Photograph: Employers receive their Corporate Health Standard awards at the Liberty Stadium, Swansea in 2016.
**Purpose and Audience**

This handbook provides guidance on the application, assessment and award processes for the Corporate Health Standard (CHS). It has been developed to provide further information to businesses and organisations applying for a CHS award, but may also be of interest to partner organisations of the CHS, along with Assessors.

It complements the CHS information pack which contains the specific criteria details for the four levels of award: Bronze, Silver, Gold and Platinum.

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</table>
INTRODUCTION TO THE CORPORATE HEALTH STANDARD

How do I apply for a CHS award?
If your business/organisation is interested in working towards a Corporate Health Standard (CHS) award, including free support and advice, please contact Public Health Wales:

E-mail: Workplacehealth@wales.nhs.uk
Facebook: Healthy Working Wales
Twitter: @Healthywork_HWW
Internet: www.healthyworkingwales.wales.nhs.uk

What is involved in achieving a CHS award?
The CHS pack sets out in detail the organisational support and specific health issues criteria that must be in place within your business/organisation for you to achieve each level of Award. The CHS is a developmental process and organisations are encouraged to work their way through each award level, however it is acknowledged that some organisations are already functioning at a high level and are able to meet the criteria for Silver or Gold at the outset. As you work through the process your Practitioner will be in a position to advise you of the appropriate level of application for your organisation.

The ethos of the CHS is to encourage and enable the development of good practice in the promotion of health and wellbeing. The process is positive in nature, always highlighting strengths and good practice and constructively identifying points for further development.

How can I demonstrate the business/organisation’s award level?
Embedding health and wellbeing within the culture of your workplace requires a planned approach and in order to sustain your wellbeing activities, and to progress with the Corporate Health Standard, you need to have some kind of working/steering group. This can be an existing group if the membership is suitable and your Practitioner can advise you on this.

You will need to complete an action plan and provide evidence to demonstrate that you meet the CHS criteria at the appropriate level. Evidence can include policies, minutes of meetings, photographs and may be provided electronically. Your Practitioner will support you in developing the action plan for which a template is available.

What should my business/organisation include in its Action Plan?
The action plan should include actions that have been completed, are under-way, on-going or to be completed. A large business/organisation should submit one action plan to cover the entire organisation. Your Practitioner will provide you with
a sample template, along with examples of good practice. You should include a brief synopsis of your business/organisation at the beginning of the action plan. An overview/summary is useful for some of the subject areas and can be added at the beginning of the appropriate section.

**What support will I receive?**
You will receive a visit from your Practitioner who will talk to you about your current business, health and wellbeing policies and practices and how they fit against the organisational support and specific health issues criteria of the CHS. Your Practitioner will stay in regular contact with you by telephone, e-mail and visits, as you work towards your Award.

**How do I request advice and an assessment in the Welsh language?**
Please contact your Practitioner who can arrange for you to receive advice and support in Welsh.

**How much will this service cost?**
The entire CHS award process, including support from your Practitioner, is free of charge. The programme is funded and accredited by the Welsh Government and delivered by Public Health Wales. It is designed to help employers improve the health and wellbeing of their employees.

**What if I am only interested in a CHS award for one department/unit of my business/organisation?**
In the main, we would encourage the whole business/organisation to apply for a CHS award, so that the benefits are available for all employees. However, we appreciate that this will not always be possible, in which case we would advise you to discuss how you wish to apply with your Practitioner. We would not want to discourage any business/organisation from applying for the award. For example, a retail chain may wish to apply for a CHS award for a region of stores or even for one store to begin with.

**What if my business/organisation is part of a UK / world-wide business / organisation?**
The part of your business that is based in Wales can apply for the CHS award, your Practitioner will discuss with you how this will work in practice.

**How will I know when my business/organisation is ready for assessment?**
You are encouraged to work with your Practitioner to decide on your readiness to undergo a mock CHS assessment. Once you have completed a mock assessment and addressed any gaps identified, you should be ready to undergo a full CHS assessment.
OVERVIEW OF ASSESSMENTS

Mock Assessment

Why is a mock assessment advised?
A mock assessment allows your Practitioner to gauge if you meet the minimum standards required for the level of award that you are aiming for, before undertaking a full assessment. It will help you to identify any gaps in evidence prior to the full assessment, gives your working group experience of what will happen on the day of the full assessment and provides you with useful feedback from the assessment team. So whilst a mock assessment is not compulsory it is highly recommended and we have regular feedback from employers that it is a helpful and positive part of the award application.

Businesses and organisations should work with their Practitioner to decide on their readiness to undergo a mock assessment, which should highlight only minor issues/gaps in evidence or criteria not fulfilled, prior to booking your full assessment. Mock assessments are available for all levels of the CHS with the exception of the Platinum award.

Who will carry out the mock assessment?
Your Practitioner and one independent Assessor.

Assessors
The Assessors are drawn from a wide variety of backgrounds and disciplines and are all specialists in their chosen fields, including health and safety, organisational development, human resources, environmental health, occupational health and health promotion. Each Assessor has held a senior position in one or more of the organisations for which they have worked. The names and biographies of your Assessors will be provided to you once the date of your assessment has been confirmed.

What will happen during the mock assessment?
The mock assessment takes a full day with approximately half of the day allocated to reviewing your evidence and the other half meeting with your working group. You will be given verbal advice throughout and at the end of the day on the findings and will be advised how best to proceed with the full assessment.

Evidence
Whilst the assessment process is robust, we do not wish to make the evidence gathering exercise too onerous. Straightforward examples to reflect your organisation’s response to each criterion, relevant to the level of award that you are seeking, will be sufficient. We encourage evidence to be presented
electronically, which could include the use of hyper-links from the action plan, and your Practitioner will be able to provide further guidance and examples of good practice. You will need to provide examples of completed, up to date risk assessments but your Practitioner will advise you with regard to this.

What is the main purpose of the meeting with the working group?
For the Assessors to hear verbal evidence from the members of your working group to strengthen or clarify your documented evidence. All members of the group will have the opportunity to tell the Assessors what the organisation has been doing in terms of health and wellbeing (e.g. what activities have taken place, how the relevant procedures and policies of the organisation work in practice) and also the opportunity to ask questions regarding readiness for the full assessment.

Full Assessment

What will happen during a full assessment?
During the full assessment a panel of Assessors will visit your business/organisation to assess how you operate against the CHS criteria. The assessment will comprise four main elements: a meeting with your Chief Executive (or equivalent), a meeting with your working group to discuss all relevant criteria; a review of all the evidence you have collected; and site visits to talk to members of your workforce.

Businesses/organisations should work with their Practitioner to decide on their readiness to undergo a full assessment and will normally have undergone a mock assessment prior to their full assessment to identify and address any potential gaps in meeting the criteria.

Who will carry out the assessment?
The full assessment will be carried out by two or three independent Assessors, depending on the level of award you are aiming for. Two Assessors are used for Bronze and Platinum level awards and three Assessors for Silver and Gold level awards. One of the Assessors will also act as Chairperson.

What is the main purpose of the meeting with the working group?
As for the mock assessment, the Assessors will hear verbal evidence from the members of your working group to strengthen or clarify your documented evidence and to tell the Assessors what is planned going forward.

How long will the assessment last?
A full assessment will take between 1 and 2 days depending on the level of award and the size of the business.
What is the main purpose of the site visits?
The Assessors like to meet a range of people working in the organisation, to gain their perspectives on what the organisation is doing to support them in terms of their health and wellbeing, and to establish if the organisation’s policies and practices are reaching individual employees. Each Assessor will visit different departments/sites so that they meet as many employees as possible. Your Practitioner will discuss your site visits with you and they will form part of your assessment timetable.

Evidence
The same evidence can be provided as for the mock assessment along with any additional information either from the mock feedback or from more recent activities or policy updates, which have taken place in the meantime.

Platinum Level Assessment
Businesses/organisations holding a current Gold level CHS award for at least 12 months are eligible to apply for a Platinum level award. This level recognises responsible employers that demonstrate an organisational commitment to support not only their employees, but also other employers and the local community, and that sustainable development is an integral part of their business practice and culture.

The Platinum level award covers a different set of criteria to the other levels and the application consists of three stages; initial approval of a case study; submission of evidence and a one-day assessment.

Re-validation
Businesses/organisations who have achieved the CHS award, and wish to remain at the same level, can apply for re-validation of their award when it is due to expire after 3 years. Re-validation can occur 3 months before the expiry date and up to 6 months following the expiry date of the previous award. Any businesses/organisations going beyond this timescale will be required to undergo a further full assessment.
MOCK ASSESSMENT PROCESS

When should a mock assessment take place?
It is advisable that the mock assessment takes place about 3 months prior to the full assessment so that there is time for the business/organisation to address any gaps identified. Your Practitioner will advise you if they think you are ready for a mock assessment based on regular discussions via emails and meeting.

What will happen during the mock assessment?
The main purpose of the mock assessment is to gauge if, and when, you are ready for a full assessment. You will be given feedback on the evidence collected so far (e.g. is it easy to follow, sufficient and appropriate) and your working group will get experience of the type of questions asked during a full assessment.

Who should be available during the assessment?
Ideally, all members of the working group should be present for some or all of the meeting plus those responsible for completing the evidence portfolio, if they are not on the working group, and they will be encouraged to contribute to the discussions.

How long will the assessment last?
The mock assessment lasts a full day, a sample timetable is provided below.

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.00am</td>
<td>CHS lead welcomes Assessors and introductions given, explain housekeeping arrangements, health and safety, e.g. toilets, fire exits, fire alarms.</td>
</tr>
<tr>
<td>9.30</td>
<td>Assessor reviews the portfolios of evidence.</td>
</tr>
<tr>
<td>11.00</td>
<td>Assessor meets the working group.</td>
</tr>
<tr>
<td>12.30</td>
<td>Lunch – If you have catering facilities it is advisable that the Assessor is taken there for lunch. Alternatively, a buffet lunch can be provided. Please inform your Practitioner if it will be necessary for the Assessor to bring their own lunch.</td>
</tr>
<tr>
<td>13.00</td>
<td>Assessor continues to meet with the working group.</td>
</tr>
<tr>
<td>14.30</td>
<td>Assessor continues to review the evidence.</td>
</tr>
<tr>
<td>15.30</td>
<td>The Assessor will provide verbal feedback to the organisation. <em>It is up to the organisation who attends this feedback session.</em></td>
</tr>
<tr>
<td>16.00</td>
<td>Close</td>
</tr>
</tbody>
</table>

Your Practitioner will provide advice and guidance on your timetable prior to submission.

Process for booking a mock assessment:
Once you feel you are ready for a mock assessment, in agreement with your Practitioner you should contact them suggesting potential dates. To provide some
flexibility 2 or 3 dates should be suggested in the first instance. If one of these dates is suitable, you will receive an e-mail confirmation including the name of the independent Assessor and the date for submitting paperwork. You should indicate the level of award that you are aiming for when requesting a mock assessment.

Three weeks prior to the assessment date, you are required to e-mail the following items to Healthy Working Wales:

- Up-to-date action plan.
- Timetable for the mock assessment.
- Background information on the organisation, or a link to the organisation’s website.
- Map and directions to the venue.
- Advice on parking arrangements.
- Contact details for named CHS lead, ideally including a mobile phone number.

The Assessor uses this information to become familiar with your organisation and to prepare for the mock assessment visit.

If the documents are too large to email you will need to provide the information on a USB stick and you will need to contact the Workplacehealth mailbox for a postal address. If you are unable to provide this information electronically please discuss this with your Practitioner without delay.

**Assessor’s requirements on day of mock assessment**

A suitable meeting room should be allocated for the duration of the assessment that is light and well ventilated with adequate space to view the evidence and to hold the working group if this meeting is to be held in the same room. It is appreciated if water, tea and coffee are readily available (this does not have to be free of charge).

**Electronic submission of evidence**

If some or all of the evidence is electronic then it will be necessary for you to provide a computer (or laptop/tablet) in the room for both the Assessor and the Practitioner (i.e. two devices) and a mouse if possible too. Please test your equipment and links prior to the assessment and write down any access and Wi-Fi codes that may be required and ensure someone is contactable should there be technical difficulties.

Your Practitioner supports you all the way through this process so will advise you on any aspects you may be unclear about and you will be sent reminders from Healthy Working Wales admin team.
At the end of the assessment
You will be given verbal advice throughout and at the end of the day on the findings and will be advised how best to proceed with the full assessment. You will also be provided a few days later with a short document summarising the development points, which your Practitioner will work with you on in preparation for your full assessment.
FULL ASSESSMENT PROCESS

When should a full assessment take place?
It is advisable that the full assessment takes place about 3 months after the mock assessment so that there is time for the organisation to address any gaps identified during the mock assessment; however if the organisation is ready this can take place sooner subject to Assessor availability. Ideally, full assessments should be carried out within 6 months of the mock to ensure that any feedback is current (and not later than 12 months otherwise another mock assessment is recommended).

What will happen during a full assessment?
The full assessment follows the same format as the mock assessment with the addition of a meeting with your Chief Executive (or equivalent) and a walk around one or more of your sites to talk to members of your workforce.

Who should be available during the assessment?
Senior personnel should be available for the initial, shorter meeting (ideally the Chief Executive, Managing Director or Chair of the Board) however if this is not possible to arrange then the Assessors will meet representatives of the senior management team. For the second longer meeting all members of the working group and those responsible for completing the evidence portfolio, if they are not on the working group, should be present for some or all of the meeting. For a Bronze level assessment, it is important that your member of staff (or external consultant) who has responsibility for Health and Safety is present during the working group meeting or at some other time during the day. If any members of the group are unable to attend, due to unforeseen circumstances, they should ideally deputise to another person who has expert knowledge on the subject area they would have been covering.

How long will the assessment last?
A full assessment for a Bronze level award will normally take a maximum of 1 day to complete. A full assessment for the other three levels of award will take between 1-2 days to complete depending on the size and type of business/organisation, the number of sites in the business and the level of award assessed. For example as a guide, medium sized organisations can require one day and large (or multi-site) organisations can require two days, Platinum assessments require 1 day to complete and Silver and Gold assessments require up to 2 days. Suggested timetables can be found on the following pages.
**Suggested Assessment Timetable for One Day Assessments**

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.00am</td>
<td>CHS lead welcomes Assessors and introductions given, explain housekeeping arrangements, health and safety, e.g. toilets, fire exits, fire alarms. The Assessors will need to spend some of this time alone to prepare for the senior management meeting that follows.</td>
</tr>
<tr>
<td>9.30</td>
<td>Assessors meet Chief Executive/Managing Director/Chair of the Board.</td>
</tr>
<tr>
<td>10.00</td>
<td>Assessors review the portfolios of evidence.</td>
</tr>
<tr>
<td>11.30</td>
<td>Assessors meet the working group (your Practitioner will also be present as part of your working group to provide support).</td>
</tr>
<tr>
<td>13.00</td>
<td>Lunch – If you have catering facilities it is advisable that the Assessors are taken there for lunch. Alternatively a buffet lunch can be provided (whenever possible). Please inform your Practitioner if it will be necessary for the Assessors to bring their own lunch.</td>
</tr>
<tr>
<td>13.45</td>
<td>Assessors continue meeting with the working group.</td>
</tr>
<tr>
<td>15.00</td>
<td>Site visits where Assessors will talk to members of your workforce. Assessors should be accompanied to the site where they should be introduced and left to talk to any employees.</td>
</tr>
<tr>
<td>16.00</td>
<td>Assessors will meet and continue to review the evidence.</td>
</tr>
<tr>
<td>16.45</td>
<td>Assessors will provide brief feedback to the working group.</td>
</tr>
<tr>
<td>17.00</td>
<td>Close</td>
</tr>
</tbody>
</table>
### Suggested Assessment Timetable for Two Day Assessments

#### Day One

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.00am</td>
<td>CHS lead welcomes Assessors and introductions given, explain housekeeping arrangements, health and safety, e.g. toilets, fire exits, fire alarms. The Assessors will need to spend some of this time alone to prepare for the senior management meeting that follows.</td>
</tr>
<tr>
<td>9.30</td>
<td>Assessors meet Chief Executive/Managing Director/Chair of the Board.</td>
</tr>
<tr>
<td>10.00</td>
<td>Assessors review the portfolios of evidence.</td>
</tr>
<tr>
<td>12.00</td>
<td>Assessors meet the working group (your Practitioner will also be present as part of your working group to provide support).</td>
</tr>
<tr>
<td>13.00</td>
<td>Lunch – If you have catering facilities it is advised that the Assessors are taken there for lunch. Alternatively a buffet lunch can be provided (whenever possible). Please inform your Practitioner if it will be necessary for the Assessors to bring their own lunch.</td>
</tr>
<tr>
<td>13.45</td>
<td>Assessors continue meeting with the working group.</td>
</tr>
<tr>
<td>15.15</td>
<td>Assessors will meet and continue to review the evidence.</td>
</tr>
<tr>
<td>16.15</td>
<td>Assessors will discuss arrangements for the site visits to take place on the following day with the business/organisation.</td>
</tr>
<tr>
<td>16.30</td>
<td>Close</td>
</tr>
</tbody>
</table>

#### Day Two

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.00am</td>
<td>Site visits where Assessors will talk to members of your workforce. Assessors should be accompanied to the site where they should be introduced and left to talk to any employees.</td>
</tr>
<tr>
<td>12.00</td>
<td>Assessors reflect on site visits</td>
</tr>
<tr>
<td>12.30</td>
<td>Lunch (as day one)</td>
</tr>
<tr>
<td>13.15</td>
<td>Assessors meet and continue to review the evidence and possibly speak to key members of staff.</td>
</tr>
<tr>
<td>15.45</td>
<td>Assessors will provide brief feedback to the working group, and inform you of the level of award you have achieved</td>
</tr>
<tr>
<td>16.00</td>
<td>Close</td>
</tr>
</tbody>
</table>

**NB the finish time on the second day will be dependent on the size and geographical spread of the sites.**

**What is the main purpose of the site visits?**
For the Assessors to meet a range of people working in the organisation, to gain their perspectives on what the organisation is doing to support them in terms of their health and well-being, and to establish if the organisation’s policies and practices are reaching individual members of staff. Each Assessor will visit
different departments/sites so that they meet as many staff as possible. Your Practitioner will discuss your site visits with you and they will form part of your assessment timetable. During a one-day assessment in a multi-sited business/organisation the site visits will be limited to local activities, for a two day assessment the Assessors will visit a variety of sites on the second day over a larger geographical area.

**Process for booking a full assessment**

Once you feel you are ready for a full assessment, in agreement with your Practitioner you should contact them suggesting potential dates. To provide some flexibility 2 or 3 dates should be suggested in the first instance. If one of these dates is suitable, you will receive an e-mail confirmation including the names of the independent Assessors and the date for submitting paperwork. You should indicate the level of award that you are aiming for when requesting a full assessment.

Three weeks prior to the assessment date, you are required to e-mail the following items to the Healthy Working Wales mailbox:

- Up to date action plan.
- Timetable, to include a list of possible sites/areas to visit.
- Where possible some of the organisation’s policies and procedures that relate to the CHS (e.g. Health and Safety, Alcohol and Substance Misuse, Stress/Mental Health, Tobacco/No Smoking policies, Health and Wellbeing Strategy).
- Background information on the organisation, or a link to the organisation’s website.
- Map and directions to the site/s.
- Advice on parking arrangements.
- Contact details for named CHS lead, ideally including a mobile phone number.

The Assessors use this information to become familiar with your organisation, as they will not have carried out your mock assessment, and to prepare for the assessment visit.

If the documents are too large to email you will need to provide the information on a USB stick (one for each Assessor) and you will need to contact the Workplacehealth mailbox for a postal address. If you are unable to provide this information electronically please discuss this with your Practitioner without delay.

**Assessor’s requirements on day(s) of assessment**

A suitable meeting room should be allocated for the duration of the assessment that is light and well ventilated with adequate space to view the evidence and to hold the working group if this meeting is to be held in the same room. It is appreciated if water, tea and coffee are readily available (this does not have to be free of charge).
**Electronic submission of evidence**
If some or all of the evidence is electronic then it will be necessary for you to provide a computer (or laptop/tablet) in the room for each Assessor (i.e. two or three depending on the level of assessment) and a mouse if possible too. Please test your equipment and links prior to the assessment and write down any access and Wi-Fi codes that may be required and ensure someone is contactable should there be technical difficulties.

Your Practitioner supports you all the way through this process so will advise you on any aspects you may be unclear about and you will be sent reminders from Healthy Working Wales admin team.

**Notification of award**
The Assessors will give you brief feedback at the end of the assessment, which usually consists of three or four positive points and three or four areas for development, together with confirmation on the level of award achieved (whenever possible).

**Written report**
The Chairperson of the assessment panel will send a written report outlining good practice and areas for development to the business/organisation. You will have the opportunity to make any changes to the accuracy of the content, but not to the recommendations. You would need to raise any comments on the recommendations with the assessment Chairperson in the first instance.

**Continuing Practitioner support**
Once you have received your written report your Practitioner will organise a post assessment visit or telephone call to give you guidance on taking forward the areas for development and maintaining the award.

**Conditions applied to award**
On the rare occasion that any conditions have been applied to your award they will be followed up and monitored by your Practitioner in order to ensure that they comply with the timescale imposed by the Assessors.

**When will I receive my award?**
The Welsh Government will send your award plaque and certificate to you after successful completion of the assessment and will also invite you to attend an official award ceremony.
What happens after I receive my award?
Your award is valid for 3 years however support from the Healthy Working Wales programme and your Practitioner is maintained once you achieve an award.

Can I apply for the next level of award within three years of my current award?
Yes. We would encourage you to consider working towards the next level of award at any time (although the soonest you can do this is 6 months after achieving the previous level), as this would offer increased benefits for your business/organisation and staff. Your Practitioner would continue supporting you in working towards the next level.

Evaluation of the assessment process
With the summary report, you will receive a brief evaluation form on the assessment process. Please complete this and return it to the email address provided. The Welsh Government, Public Health Wales and the independent assessment service are all keen to hear your comments on the process. This is a learning and development process for all concerned and feedback is appreciated for future improvements to the service.

Route to appeal
The route to appeal a decision of the Assessment Panel is through the Chairperson of the panel in the first instance. To begin with, the employer should speak with the Chair on the specific detail/s in question. The employer should then follow this up in writing by e-mail or letter, copied to the Welsh Government (healthyworkingwales@wales.gsi.gov.uk) and Public Health Wales (workplacehealth@wales.nhs.uk). The Chairperson will then discuss the case with the Welsh Government. Please note the business/organisation should speak to their Practitioner before beginning this process.

Complaints
In the event that you wish to make a complaint, please e-mail the Welsh Government (healthyworkingwales@wales.gsi.gov.uk) and request a call back to discuss the matter.
RE-VALIDATION ASSESSMENT PROCESS

What will happen during a re-validation assessment?
The re-validation will generally be completed by one independent Assessor, your Practitioner may also attend too, and is generally carried out during attendance at a Health and Wellbeing group meeting, or equivalent. You are expected to submit an updated action plan to demonstrate your on-going, current and planned work and a brief summary of the implementation of the essential recommendations from your previous full assessment report, together with any other information/evidence that you wish to provide. Presentations have been found to be a useful way of demonstrating the required information during the revalidation assessment.

The re-validation visit normally takes 2-3 hours. You may wish to discuss the format with your Adviser. The structure of re-validation visits will vary depending on the size and nature of the business/organisation, but an example timetable can be found below:

Suggested Timetable for Re-validation Visit

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>10:00</td>
<td>Welcome Assessors, introductions and housekeeping arrangements</td>
</tr>
<tr>
<td>10:15</td>
<td>Meet with working group (for 1-2 hours)</td>
</tr>
<tr>
<td>12:15 – 13:00</td>
<td>Additional information, which could include meeting with senior management, talking to staff and viewing further evidence.</td>
</tr>
</tbody>
</table>

Note: You will not need to undertake a mock assessment for re-validation. If approved, a new certificate will be issued from the date your last award expired and will be valid for a further 3 years. Following the employer’s first full assessment and re-validation, a second full assessment will be required as a period of six years will have elapsed from the initial assessment.

Conditions of re-validation:
The business/organisation should consider the following list of conditions, with their Practitioner, to establish their suitability for re-validation:

1. The business/organisation has not undergone any significant changes since their last assessment, i.e. re-structuring, significant increases in staffing, change of ownership etc.
2. The Health and Wellbeing group, or equivalent, has been maintained to progress and monitor the work.
3. An action plan and policies have been maintained.
4. The ‘essential’ recommendations from the full assessment report have been implemented.
5. The business/organisation has not already undergone a re-validation at this level.
RECEIVING YOUR AWARD

When will I receive my award?
Following a successful assessment you will receive an email from the Healthy Working Wales mailbox requesting what details you wish to appear on your award plaque and certificate as they are made to order. You will also receive an electronic template for the Healthy Working Wales logo. The Welsh Government will send your award plaque and certificate to you and will also invite you to attend an official award ceremony.

Guidelines for using the ‘Healthy Working Wales’ logo
The CHS provides employers with recognition for their approach to caring for the health and wellbeing of their staff, and award-holders are able to communicate this through the use of the ‘Healthy Working Wales’ logo, which includes Bronze, Silver, Gold and Platinum variations.

Businesses and organisations holding the CHS may use the ‘Healthy Working Wales’ logo on the following:

- Stationery, including letterheads and business cards;
- Website (you might wish to link to the Healthy Working Wales website: www.healthyworkingwales.wales.nhs.uk)
- Recruitment advertisements;
- Brochures, leaflets and newsletters;
- Corporate facilities including buildings and vehicles.

Using the logo
To make sure that the logo and branding is as effective and as prominent as possible there are a few guidelines that need to be followed:

- Logo colours, proportions and font style must not be altered;
- The components of the logo must not be re-arranged;
- The logo should preferably not be smaller than 40mm x 19mm;
- There should be space on all sides of the logo, equal to one tenth of the logo height.

Restrictions
The ‘Healthy Working Wales’ logo:

- Cannot be used to endorse specific products or services for commercial gain;
- Is subject to Crown Copyright and is a registered trademark. If used inappropriately, you or your business/organisation will be liable for any damages resulting from any inappropriate use, and will be asked to refrain from using the brand in the future;
- Cannot be used if your business or organisation’s award expires.
If you have any queries on using the ‘Healthy Working Wales’ logo or require the logo in an alternative format please e-mail: Workplacehealth@wales.nhs.uk
PLATINUM ASSESSMENT PROCESS

Platinum Level Assessment
Organisations holding a current Gold level CHS award for at least 12 months are eligible to apply for a Platinum level award which consists of three stages; initial approval; submission of evidence; and a workplace visit/assessment. In order to be ready and considered for Platinum the organisation must be ‘leading the way’ in four out of the six topic areas of transport, procurement, facilities management, capital build, employment and skills and community engagement and ‘getting there’ in the other two as a minimum. They also need to be able to submit a case study which covers at least one of the topic areas and which demonstrates best practice that has gone beyond legislation and shows an exemplar commitment, outside the normal business of the organisation. Due to the different topic areas covered for Platinum most organisations find that they need a separate working group to take this forward, however the existing wellbeing group should continue to ensure that the Gold criteria are maintained.

Whilst the Well-being of Future Generations Act only applies to public bodies, you should use the five ways of working from the Act to show how your business/organisation has applied the sustainable development principle below:

Long term
The importance of balancing short-term needs with the need to safeguard the ability to also meet long-term needs.

Prevention
How acting to prevent problems occurring or getting worse may help public bodies meet their objectives.

Integration
Considering how the public body’s well-being objectives may impact upon each of the well-being goals, on their objectives, or on the objectives of other public bodies.

Collaboration
Acting in collaboration with any other person or public body/organisation (or different parts of the body itself) that could help the body to meet its well-being objectives.

Involvement
The importance of involving people with an interest in achieving the well-being goals, and ensuring that those people reflect the diversity of the area which the public body serves.
Following approval and prior to the Platinum assessment the organisation must also demonstrate that it has maintained its progress at Gold level via a re-validation. Depending on the timescale of progression from Gold to Platinum, this may be carried out formally by an external Assessor and ideally should be completed as close as possible to the Platinum assessment date.

**Initial approval of case study**

The business/organisation must complete the ‘Summary case study template’ to provide an overview of the case study for initial consideration by Public Health Wales, the Welsh Government and the independent assessment service. The panel will report if the case study is appropriate for submission at Platinum level and may make suggestions as to other areas to consider which will make the case study more robust. The topic of the case study must meet the following criteria prior to being considered as suitable to progress:

- A function, product, project or service that is innovative and may be considered as “leading the way” within the relevant sector; or
- Not considered normal practice within the relevant sector; and
- Not a function, product, project or service that the business/organisation is legally or contractually obliged to undertake.

Once approved the business/organisation should then start completing the ‘Full case study template’ in readiness for their assessment.

**Submission of supporting documentation**

The business/organisation must complete the ‘Summary sustainable development templates’ to provide a brief overview of its commitment to sustainable development.

In the initial stages the ‘Summary sustainable development templates’ should be used to gauge whether or not the business/organisation is ready to apply for Platinum (i.e. are they ‘leading the way’ in four out of the six topic areas and ‘getting there’ in the other two as a minimum). If they are not meeting this requirement then they are not ready for assessment unless, for example, there is a piece of work or project in hand which will be completed by the time of assessment and will demonstrate that they are working at a high enough level.

The ‘Summary sustainable development templates’ and the ‘Full case study template’ should be submitted to the Practitioner in draft form for consideration at an early stage to ensure they fulfil the requirements in terms of content and readiness for assessment as there is no mock assessment for the Platinum level of the award.
**Workplace visit/assessment**

The assessment is conducted by two independent Assessors and attended by the Practitioner and takes one day.

The format and agenda for the day is flexible and the business/organisation can showcase their work in a variety of ways such as presentations, videos, information stands and boards, site visits and meeting those that have benefitted or been involved with any of the Platinum topic areas (and in particular in relation to the case study).

A large portfolio of evidence is not required, just a few examples and key documents for each criteria topic along with the submission document(s).

The timetable below shows an example format of the workplace visit:

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.00am</td>
<td>Arrival and introductions.</td>
</tr>
<tr>
<td>9.10 - 9.30</td>
<td>Discussion time for Assessors and Practitioner.</td>
</tr>
<tr>
<td>9.30 - 10.30</td>
<td>Presentation of the case study by key staff of the business/organisation</td>
</tr>
<tr>
<td>10.30 - 12.30 (including possible travel time)</td>
<td>Assessors and Practitioner to meet with individuals and/or groups who have benefited from the work in the case study.</td>
</tr>
<tr>
<td>12.30 - 13.30</td>
<td>Working lunch with key staff/stakeholders.</td>
</tr>
<tr>
<td>13.30 - 15.00</td>
<td>Assessors and Practitioner to meet with key staff responsible for the work areas that form the 6 criteria of the Platinum Standard.</td>
</tr>
<tr>
<td>15.00 - 16.00</td>
<td>Optional time for tours and/or meetings with further individuals/groups.</td>
</tr>
<tr>
<td>16.00</td>
<td>Feedback from Assessors and Close.</td>
</tr>
</tbody>
</table>
Summary case study template

Name of business/organisation:  
Contact name and address:

Name of Public Health Wales Practitioner:

Please describe the project

How does this project fit beyond the core role of your business/organisation?

Who are the key partners?

How does the project benefit the community?
Full case study template

1. **Title**

A very short description of the initiative: the case study should consider assessing the business's/organisation's impact as a total cost and the effect/s this can have on the health and well-being of the wider community.

2. **Background**

- Name of business/organisation
- Business or service it provides
- Number of employees
- Area/community it covers

3. **Summary**

Summary of the key points of the initiative.

4. **Rationale/Objectives**

- Why was the initiative introduced?
- What did the initiative aim to achieve?
- Who was intended to benefit from the initiative?
- What was the scope of the initiative?
- Monitoring/evaluation measures?

5. **Planning**

How was it planned in order to ensure:

- Organisational/management support
- Investment/funding
- Employee involvement
- Communication strategies
- Strengthening of policies and procedures

6. **What was delivered?**

- What was planned?
- What was achieved?
- How did it change practice?

7. **Key Issue**

- How was this work outside the scope of the remit of the business/organisation?
- How was this work above and beyond your duty to comply with legislation?
8. **Additional Information**

- Any other relevant information
Summary sustainable development templates

These summary templates should be used by employers before engaging in the Platinum Standard to self-assess the current level of the business/organisation's sustainable development and corporate social responsibility work. The summary templates should include a brief overview of your activities relevant to the following six topic areas:

- Transport
- Procurement
- Facilities management
- Capital build
- Employment and skills
- Community engagement

In each topic area you are asked to provide a self assessment of how well you think your business/organisation is doing and should consider the three statements – Starting out; Getting there; and Leading the way.

You should identify 2/3 examples of work under each of the six criteria topic areas and then decide whether each example of your work is 'starting out', 'getting there' or 'leading the way' by following the statements for each criteria as set out in the sections below and highlight the statement which best reflects your commitment in each area. You should then send the completed summary template to your Practitioner for their assessment of your readiness to apply for Platinum.

To be eligible to apply for Platinum, the business/organisation will need to be 'leading the way' in 4 out of 6 of the criteria above and 'getting there' in the remaining 2 criteria, as the Platinum Standard recognises 'exemplar' employers. If you believe you are meeting this requirement, you should contact your Practitioner to request a workplace visit/assessment. If the business/organisation has development points in any of these areas, the employer should pause their application for the Platinum Standard at this stage and contact their Practitioner for advice on the areas for development.
**Transport**

Improving transport options is an excellent way to promote good health and reduce the impact on the environment.

Possible areas for action:

- Reviewing the travel plan, including measuring targets;
- Reducing the need to travel or eliminating unnecessary journeys;
- Offering pleasant surroundings for pedestrians in and around your buildings;
- Continuing to provide good cycling facilities;
- Planning to use lower carbon options for transport, for example pool bikes, ‘green’ cars, pool cars and lease cars;
- Promotion of public access car share schemes for travel to conferences, events etc.

To help you self assess how you are doing in terms of supporting sustainable travel, which of the following statements best fits your business/organisation:

**Starting out:** there is a travel plan that promotes cycling, walking and the use of public transport.

**Getting there:** the travel plan is used, reviewed and regularly updated and sets targets to minimise car travel.

**Leading the way:** the travel plan is long term, strategic and incremental; it is supported by senior management. It sets targets to reduce emissions, increase active travel and the use of public transport. Progress is monitored and reported on annually. Staff have personalised travel plans.

- Please provide some examples in the space below:

- What evidence of these activities is available?
Procurement

Sustainable procurement means purchasing goods and services in a way that maximises positive benefits and minimises negative impacts on our economy, society and environment.

Possible areas for action:

- Implementing a procurement policy that includes sustainable procurement;
- Supporting local small and medium enterprises by communicating with them and purchasing a specified proportion of goods from them;
- Considering running costs and disposal costs in tender specifications;
- Reducing the travel distance of procured goods and services;
- Providing sustainable procurement training;
- Procuring cleaning chemicals and paints which are low in toxicity and emissions;
- Buying goods that are biodegradable, made from recycled material or re usable materials.

To help you self assess how you are doing in terms of supporting sustainable procurement, which of the following statements best fits your business/organisation:

Starting out: there is a sustainable procurement policy that promotes purchasing locally and buying biodegradable, recycled and re usable goods.

Getting there: the procurement policy is used and reviewed regularly. There are targets for purchasing specific proportions of biodegradable, recycled and re usable goods.

Leading the way: the procurement policy is long term, strategic and incremental; it is supported by senior management. It sets clear targets and progress is monitored and reported on annually. The policy’s targets include increasing local spend, and reducing carbon footprints, food miles and waste to landfill. Welsh public sector employers demonstrate best practice in procurement, working with Value Wales.

- Please provide some examples below:

- What evidence of these activities is available?
Facilities Management

Sustainable facilities management reduces environmental harm as well as saving money.

Possible areas for action:

- Putting in place systematic procedures to monitor and improve performance, for example energy consumption, waste and chemical use;
- Ensuring operational procedures and equipment encourage energy efficiency, for example energy saving light bulbs, insulation and switching off lights when not needed;
- Reducing waste through recycling and re-using materials;
- Reducing water consumption, for example low flush toilets and drinking fountains;
- Reduce excessive chemical use and purchasing products with low volatility and emissions;
- Providing usable green areas;
- Addressing biodiversity in the grounds of the business;
- Providing training on sustainable housekeeping.

To help you self assess how you are doing in terms of supporting sustainable facilities management, which of the following statements best fits your business/organisation:

**Starting out:** there is measuring and reporting on the business/organisation’s, and its contractors’, facilities usage, e.g. waste, water and energy;

**Getting there:** there are systematic procedures in place for monitoring and improving performance. These are measured as part of an audit for both the business /organisation’s and contracted out services.

**Leading the way:** There is a good environmental management system - e.g. Green Dragon (level 5), ISO14001. A sustainable impact assessment is undertaken and performance management on sustainable development. Links between sustainable development and public health are understood.

- Please provide some examples below:

- What evidence of these activities is available?
Capital Build

A sustainable building is designed to reduce waste, energy and resource use, saving money, reducing environmental harm and benefiting health.

Possible areas for action:

- Designing new buildings that maximise natural light and ventilation;
- Incorporating usable green spaces;
- Providing facilities beyond your business/organisation, for example crèches, cafes, meeting rooms;
- Recycling construction waste;
- Considering location and transport issues as part of the planning process;
- Considering energy use as part of the construction phase and the operational phase of the building;
- Using recycled and/or locally procured materials where possible.

To help you self assess how you are doing in terms of supporting sustainable building, which of the following statements best fits your business/organisation:

Starting out: the whole life cost and running cost of the building are considered at the design stage and factors such as energy use, building materials, services and location are considered.

Getting there: new building designs work with the natural environment, e.g. maximises natural light and ventilation and delivers social health benefits.

Leading the way: high quality design based on maximising health impacts and minimising environmental impacts of the building; these impacts are measured and the process has stakeholder input. The building is designed/procured to incorporate structural flexibility and meets the requirements of those using it, through consultation with end-users.

- Please provide some examples below:

- What evidence of these activities is available?
Employment and skills

Employment is one of the key determinants of health, so investing in recruiting, preparing, developing and retaining local people will not only help meet growing demands for employees in the future but will also contribute to improving population health.

Possible areas for action:

• Co-ordinating an employment strategy that provides opportunities for disadvantaged groups, provides training and skills opportunities for employees, including apprenticeships and work experience;
• Targeting locally disadvantaged groups for recruitment schemes and education and training schemes to help people into work.

To help you self assess how you are doing in terms of supporting sustainable employment and skills, which of the following statements best fits your business/organisation:

Starting out: posts are advertised locally with Job Centre Plus to attract local people; there are some entry level training schemes. There is help for staff to access childcare.

Getting there: recruitment and training schemes target specific local groups. Staff satisfaction surveys show that staff who are parents or carers are happy with the level of support offered.

Leading the way: the business/organisation works in partnership with other local agencies to plan skills development and recruitment strategies to maximise the potential of the local population. The procurement strategy is geared towards local jobs and careers.

• Please provide some examples below:

• What evidence of these activities is available?
Community engagement

Employers are an integral part of the local community and contribute to social cohesion. Working in partnership with the community can bring a wider range of opinions and expertise to the table, and can also contribute to a healthier community.

Possible areas for action:

- Having effective feedback systems (open days, mail shots) with the community;
- Working with local groups (third sector, local authorities) on projects that contribute to improving public health and well-being;
- Opening facilities to the local community (green areas, gyms etc.);
- Participating in volunteering and/or providing volunteering opportunities;
- Participating in Timebanking initiatives that use time as a unit of local currency. Participants give and receive help in exchange for time credits.

As part of this approach businesses/organisations may also be considered at the Platinum level if they can demonstrate collaborative working that supports or helps develop innovative or best practice within other businesses/organisations. Examples here could also include mentoring local/smaller businesses/organisations to develop workplace health policies and activities through the Corporate Health Standard or Small Workplace Health Award.

To help you self assess how you are doing in terms of engaging with the local community, which of the following statements best fits your business/organisation:

**Starting out**: the views of the community are important to the business/organisation and there is a system for capturing comments and complaints. Some evidence of supporting staff who volunteer.

**Getting there**: effective feedback systems e.g. regular meetings, open days or mail shots impact on how the business/organisation operates. The community and staff are actively engaged in decision making. Volunteering and voluntary organisations are actively supported.

**Leading the way**: information is regularly gathered from local people, and innovative feedback systems are used to communicate how these views have contributed to decision making. Senior management champion community engagement. The business/organisation works in partnership with voluntary and support organisations.

- Please provide some examples below:

- What evidence of these activities is available?
Completion of supporting documentation
Once you and your Practitioner feel you are ready to apply for a Platinum assessment you can complete your submission document by developing further your ‘Summary sustainable development templates’. Note that you only need to provide 2-3 pages of text for each section.

If preferred you can merge the ‘Summary sustainable development templates’ with your case study document to form one submission document. Your Practitioner can provide you with examples of Platinum submission documents.

Process for booking a Platinum assessment
You should contact your Practitioner suggesting 2 or 3 potential dates to provide some flexibility. If one of these dates is suitable, you will receive an e-mail confirmation including the names of the independent Assessors and the date for submitting paperwork.

Three weeks prior to the assessment date, you are required to e-mail the following items to the Healthy Working Wales mailbox:
- Supporting documentation i.e. final versions of ‘Summary sustainable development templates’ and case study documents.
- Timetable, to include sites/areas to be visit where appropriate.
- Map and directions to the site/s.
- Advice on parking arrangements.
- Contact details for named CHS lead, ideally including a mobile phone number.

If the documents are too large to email you will need to provide the information on a USB stick (one for each Assessor) and you will need to contact the Workplacehealth mailbox for a postal address. If you are unable to provide this information electronically please discuss this with your Practitioner without delay.
**Platinum Re-validation**

To achieve re-validation of the Platinum Standard, employers should demonstrate that the business/organisation is maintaining its practices in the areas of the Gold Standard criteria (through a Gold re-validation) and the Platinum Standard case study and six criteria.

Employers will need to up-date their existing case study and report on the maintenance and progression (where applicable) of other six Platinum criteria. Note: A new case study will be required for the second full Platinum assessment.