



Module 3.2 Transcript

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Welcome to the second Module of the Planning Development Cycle Step.

This module shows you how to select a goal and objective statements and how to choose appropriate interventions based on your program priority.

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Congratulations... you are almost half way through the Development Cycle! Lets continue to focus on planning your worksite wellness initiative.

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In this module you will learn how to write a strategic plan as a roadmap for the worksite wellness initiative.

By the end of this module, you will be able to:

- Articulate the elements of a worksite wellness strategic plan,
- Describe how your organization will use the strategic planning process to develop your Worksite Wellness Action Plan,
- Utilize the strategic planning process to select goals and objectives statements to support an identified health priority,
- Select interventions to support a goal and objectives, and
- Understand the fundamentals of program evaluation as an element of a worksite wellness initiative and strategic plan.

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You have already started to complete the planning section of the Worksite Wellness Action Plan. In this step, we'll be digging in deeper and completing the rest of the planning section to create the strategic plan for your wellness initiative.

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The Planning section of the Worksite Wellness Action Plan will address these elements:

- Program priorities and the policy and environmental supports that align with those priorities
- Staffing responsibilities
- Program rationale
- Goal
- Objectives
- Interventions

- Community Resources, and
- An evaluation plan

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In order to facilitate the development of your plan, we are providing information on a process called Strategic Planning.

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As we've explained thus far, planning is a very important step. Planning can also be a very time consuming step. To help keep this process moving, we are providing you with tools that will give you an easy and efficient way to work through your plan's development. The Strategic Planning Process that we are sharing with you is a collaborative and interactive process to develop goals and objectives.

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The next step is to download the Planning Facilitation Guide from the Resources tab. We recommend that the Sponsor and Champion meet and review the guide and then schedule the planning session. The planning session with your Wellness Committee takes approximately one hour to complete. If you are interested in a more in-depth planning facilitation guide, from the Resources tab, access the supplemental Planning Facilitation Guide available in the Healthy Workplaces Toolbox.

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Once you have agreed upon your top program priority, you will want to select a goal and objectives that reflect the identified priority that you are going to focus on first.

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Let's look at an example. In the Assessment step, it is well known at this workplace that there are a lot of smokers and county health data indicated that over 21% of the county population are tobacco users and tobacco cessation was the top identified wellness interest by employees. The Champion and Committee recognize the impact this has on employees' health and productivity. So they have identified tobacco cessation as the top program priority. The Committee agreed upon the goal statement as 'To create a tobacco free work culture'. The next step is to select the objectives. There can be multiple objectives to support a single goal.

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To help you with this step, we've created some sample goal and objective statements based on common program priorities such as nutrition and healthy eating, tobacco cessation, physical activity and ergonomics.

Download the Goal and Objectives Guidance Document from the Resources tab and have it handy in your planning meeting with your Committee.

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The entire Wellness Committee should now come together to work on selecting a goal and objectives based upon the program priority that you have decided to focus on first.

In this step the Committee will use your top program priority from the first module in planning, to select one goal and supporting objective statements.

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Our next step is to identify the specific interventions that will support your goal and objectives.

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Interventions are methods used to influence, facilitate or promote behavior change. The types of interventions are: awareness and education, behavior change and worksite policies and environmental supports.

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Awareness and education interventions focus on topics related to employee needs and interests and provide information to employees to raise awareness of health topics.

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Examples of awareness and education interventions are:

- Posting signs or sending emails about healthy choices related to nutrition, physical activity, tobacco, etc.,
- Providing a series of educational seminars, workshops, and classes or post availability of community seminars, and
- Providing brochures, videos, pamphlets, news articles, or other written materials that address the benefits of engaging in healthy choices.

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Behavior change programs focus on skill development and activities to enable employees to consider their health behaviors, address any barriers to change behaviors, and finally change behaviors to reduce health risk and vulnerability.

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Examples of Behavior change interventions include:

- Providing free or subsidize one-on-one or group lifestyle coaching and/or counseling in the workplace or the community (e.g., for depression or high blood pressure),
- Providing education opportunities to teach skills to make healthy choices,
- Subsidizing or providing discounts on healthier foods and beverages offered in vending machines, cafeterias, snack bars, etc., and
- Provide or subsidize physical fitness assessments, follow-up counseling and physical activity recommendations either on-site or through a community exercise facility.

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Worksite policies and environmental supports are organizational policies, norms and physical factors that support a healthy work culture and foster healthy choices. These interventions also create a workplace environment that supports and enables healthy lifestyles. These interventions demonstrate organizational commitment and support of worksite health promotion at all levels of management. Be sure to link back to the policy and environmental

support considerations that you selected for your program priority in the first module of planning.

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Some examples of Worksite policies and environmental supports interventions are:

- Creating and implementing policies that restrict or ban tobacco at the worksite,
- Creating and implementing organization-wide healthy meeting guidelines,
- Providing a dedicated quiet space that employees can engage in relaxation activities such as deep breathing exercises, and
- Ensuring that workloads are moderate enough to avoid excessive fatigue and risk of injury.

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Now let's look at how the intervention types will be applied across a specific objective.

If the objective is to support employees in living tobacco free by creating a tobacco-free workplace, here are how the various types of interventions would play out. Be sure to focus on multiple intervention strategies (awareness and education, behavior change and supportive work environment) for maximum impact.

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Now that the Wellness Committee has identified one goal and multiple objectives, the next step is to select the specific interventions that you will implement to accomplish your goal. Once again we'll go back to the Worksite Wellness Action Plan to continue working on the Planning section of the document.

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To help you plan your wellness initiative using evidence-based interventions, we've put together some intervention ideas for common priority areas (e.g., nutrition and healthy eating, physical activity, ergonomics, stress management, and tobacco cessation). These are also in the Goals and Objectives Guidance Document you downloaded earlier. Remember, you only need to complete a Worksite Wellness Action Plan for your top program priority. This includes one goal statement and supporting objectives and interventions. Be sure to look at the categories listed: policy and environmental support, behavior change and education/awareness to ensure that you are selecting a variety of types of evidence-based interventions.

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How will you know if your interventions have been successful? Let's begin by discussing what evaluation is and why it is crucial to the success of your wellness initiative.

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You have been progressing through the Worksite Wellness Action Plan. The final step in the Planning section is to identify evaluation strategies for each objective.

For worksite wellness initiatives to succeed, evaluation is required to ensure ongoing quality assurance and improvement. Evaluation helps organizations celebrate successes and improve

initiatives to meet the needs of the organization and its employees. Evaluation also enables senior management and the wellness team to measure the impact and outcomes of interventions, and to plan for future efforts. In addition, evaluation can be used to assess the performance of the team.

It is important to plan the program evaluation in concert with planning the program. It is essential to identify how each intervention will be evaluated and assessed as part of the overall Worksite Wellness Action Plan. Evaluation and assessment should be considered at various points in the initiative. For example, it might be conducted at the end of an activity or month, depending on the type of intervention. Ongoing evaluation allows for mid-course changes or adjustments based on feedback and response from the participants. Evaluation at the end of a specific program assesses the impact on knowledge, attitudes, skills, beliefs and behaviors of the participants. Ideally, evaluation plans should be developed as part of the planning process and before beginning the intervention activities.

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Let's explore the different types of evaluation measurements.

Process measures.

Process measures examine all the steps and activities taken in implementing a program and the outputs they generate. For example, this might be the number and type of educational materials distributed to employees for a weight management class. They are useful for keeping implementation of the program on track and also for determining if program implementation met the quality and other standards to which the program aspired. This is important so that, if a program does not achieve its intended outcomes, it can be determined if the program was the wrong approach or if it was a strong program that simply was not implemented correctly.

Process measures also can assess issues such as the costs of operating a program, the numbers of employees reached, the most successful program locations, or comparisons of the program's design and activities to others. This is the type of evaluation on which you will focus in the first year of your initiative. As your initiative matures and you have more elements to evaluate, you will then move on to impact and outcome evaluation.

Impact measures. Impact measures assess the impact the initiative is having on such things as employees' behaviors and risk factors.

Outcome measures.

Outcomes are events or conditions that indicate initiative effectiveness. As a rule, these are considered as short-, intermediate, or long-term. Long-term measures, in the context of workplace health promotion, typically relate to things like reductions in disease or injury and the costs associated with them. These are often similar to the goals of the program and these long-term outcomes often take years to observe.

Baseline measures

Some subset of the process or outcomes measures may need to be collected from the very start of the intervention as "baseline" measures. The need for baseline measures is one key reason for designing the evaluation plan before implementation begins.

Baseline measures establish a starting place and frame of reference for the workplace health initiative. These can usually be developed from data collected during the initial assessment activities and summarized in the evaluation report. This tool will be covered in the evaluation module later in the developmental cycle.

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Since you will be using mostly process evaluation in the first year of your initiative, let's look at a few of the types of questions that process evaluation will answer.

What activity was implemented? How much did it cost? Who did it impact?

Was it implemented in the way you planned? Were employees satisfied with the programs they attended?

Keep these questions in mind, as you develop the evaluation plan for each program objective and intervention.

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From the Resources Tab, download XYZ's Worksite Wellness Action Plan. You can see how they have completed the document up to this point.

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Using the Worksite Wellness Action Plan that you started completing in the first module of planning, complete the remaining sections of the Worksite Wellness Action Plan.

Sections include:

- Staffing responsibilities,
- Program rationale,
- Goal,
- Objectives,
- Interventions,
- Community Resources, and
- An evaluation plan.

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Once you have completed the step to define your goal and objectives, a companion step is to establish a budget for these items.

You may remember that in the Buy In step we introduced the Budget Planning Template. At that time, we asked you to keep budget in mind throughout the planning process.

Now is the time to put pencil to paper (or fingers to the keyboard) and create the budget for each objective. We realize at this time you may not have all the information you need to fully plan each intervention in complete detail. That will come later in the Implementation step when you do your detailed intervention planning. For now, the goal is to do a high level budget that can be submitted with your completed Planning section of the Worksite Wellness Action Plan

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Let's see how XYZ is doing in their planning process. From the Resources tab, download the XYZ's Budget Planning Worksheet. It is best to look at both XYZ's Worksite Wellness Action Plan where they defined their goal and objectives along with the Budget Planning Worksheet. You'll see the alignment of both documents with supporting detail on the awareness and education programs, as well as the behavior change and supportive environment.

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In this module, you learned:

- How to facilitate a planning session using the Strategic Planning process,

- How to select goal and objective statements that support the program priority,
- The various types of interventions and how to identify interventions that support the goal and objectives of your wellness initiative, and
- You also learned about program evaluation and how it helps identify what is working well, or what needs to be changed or improved. Evaluation helps define the value and effectiveness of the wellness initiative.
- With all this information, you are able to complete the Planning section of the Worksite Wellness Action Plan.

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The next steps are to review the Planning Facilitation Guide, and schedule a planning session with the Wellness Committee. During the planning session with the Wellness Committee, you will determine one goal and supporting objectives for your wellness initiative. Lastly, you will select the interventions for each objective statement and complete the Planning section of the Worksite Wellness Action Plan and create your Wellness Initiative budget. For a summary, don't forget to download the Key Takeaways and Action Item Checklist document from the Resources tab. The references for this module are also available for download in the Resources tab.

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Congratulations! This concludes Module 2, the last module in Planning. If interested in additional Planning tools to supplement what you've learned, click on the Resources tab to access them. These supplemental tools are optional. The next step in the Wellness Program Development Cycle is Community Partnerships. See you there!

Now you'll complete a short quiz. Click the Planning quiz link below to get started.