



Planning Session Facilitation Guide

The purpose of this Facilitation Guide is to prepare the Wellness Sponsor and Champion to engage the Wellness Committee to develop a goal and corresponding objectives for your worksite wellness initiative. Results of these conversations will guide your intervention selection.

Materials

1. Ensure you have the following materials available for your 60 minute Planning session:
 - a. Copies of the Wellness Program Goal and Objectives document provided by Working on Wellness that pertain to your top priority area(s) for all meeting attendees
 - b. Colored markers
 - c. Flipchart paper
 - d. Painter's tape (to tape flipchart to the wall)

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Develop Goal Statement

DEFINITION OF A GOAL

A projected state of affairs that a person or a system plans or intends to achieve. Identifies in broad terms how your initiative is going to change things in order to solve the problem you have identified.

EXAMPLE

Promote a tobacco-free workplace and support employees in living tobacco free.

Activity 1: Goal Statement Development

(Suggested time: 20 minutes)

1. Wellness Sponsor and/or Wellness Champion will introduce their role as facilitator: ***to guide conversation around the table and ensure active and full participation among Wellness Committee members.***
2. The purpose of this conversation is to come to consensus on a goal statement for the priority area.
3. Review the goal statement provided on the Wellness Program Goal and Objectives document for your priority area.
4. **Select Goal Statement Ideas** – Individual reflection and then group dialogue
 - a. Ask participants to think about the wellness priority area from the Prioritization Exercise, review the provided goal statement, and think about what you want to accomplish with the wellness program.

Probing questions to consider include:

 - i. What is the desired state or outcome for this priority area?
 - ii. What are we trying to achieve?
 - iii. What do we need to do in this priority area to significantly change the current state and move toward a desired state?
 - b. Encourage each group member to share their reflection as a brainstorm, and document all ideas on the flipchart.
5. After the goal development exercise, read the goal statements and ask:
 - a. What do you like?
 - b. What needs to be clarified or changed?
 - c. What needs to be added?
6. **Finalize the Goal Statement:** As a group, review the feedback received and use it to guide conversation. Come to a decision about which goal statement is most suitable by providing everyone the opportunity to vote. Write the statement clearly on the flipchart.

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Develop Objectives

What are Objectives?

- Describe the steps that will take place to achieve the behavior change(s) described by your goals.
- Break down goal statements into manageable parts -- typically 2-4 action-oriented phrases to specify what you are trying to achieve in each goal.

Objectives are **SMART**:

Specific (what will be achieved--a behavior or outcome, by whom, how much, and when)

Measurable (progress or attainment can be determined qualitatively or quantitatively)

Achievable (taking into account available time, staffing, and resources; it doesn't make sense to set your initiative for failure by creating objectives that are impossible to attain)

Relevant (to the mission, goal, needs, and interests of the organization or partnership)

Time-phased (includes a time frame for achievement)

EXAMPLES

- **Objective 1:** To reduce the number of employees that use tobacco products from 30% to 25% by January 2017.
- **Objective 2:** Establish a tobacco-free campus by January 2017.

Activity 2: Developing Objective

(Suggested time: 20 minutes)

1. The purpose of the next step is to select objectives for your identified priority area and goal for the next 1-2 years.
2. Review the provided list of objectives accompanying your selected goal.
3. To receive the full amount of funding, you should identify **ONE** objective from **EACH** of the following categories for a total of **THREE** objectives:
 - a. A policy OR environmental support objective
 - b. A behavior change objective
 - c. An awareness/education objective
4. Ask participants to consider:
 - a. By what date(s) will we be able to achieve these objectives?
 - i. What are realistic timeframes for proposed objectives? Consider short term vs. long term
 - b. How many policies, supports, or strategies can we implement by that date?



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5. After they have done so, ask them to **share/compare with a partner**, and then **share/compare as a large group**.
 - a. Document all ideas on the flipchart.
6. **Select Objective Statements:** As a group, review the feedback received and use it to guide conversation. Come to a decision about which objective statements are most suitable. Write the statements clearly on the flipchart.

Next Steps

Activity 3: Next Steps

(Suggested time: 10 minutes)

1. Congratulate participants for starting the process of creating a strategic plan for your worksite wellness initiative.
2. Let participants know that all flipcharts will be typed up for future reference.
3. Input the final selections for goal and objective statements into your Worksite Wellness Action Plan (WWAP).

Be sure to thank participants for all their hard work as they complete each major task! Also, make sure to communicate final goal and objective statements back to your employees!

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Tips on Group Facilitation

Role of the Facilitator	▪ Neutrality and leadership ▪ Advocate of process ▪ Unbiased and shows no preference for the outcome of the exercise ▪ Suggests ways for group get its work done and stay on course ▪ Helps group establish and maintain forward movement ▪ Help group reach consensus
Planning Session Preparation	▪ Be aware of exercise design/flow ▪ Review agenda prior to session ▪ Ensure that you are clear about objectives, goals and necessary outcomes
During the Session	▪ Remind group of objectives at start and throughout session ▪ Ensure all participants have a chance to be heard ▪ Assist the group in reaching consensus ▪ Encourage the group if the task is difficult ▪ Have an extra flipchart page to track ancillary issues and any follow-up needed (parking lot)
Leading Group Discussion	▪ State objectives for each discussion ▪ Record ideas that merit additional follow up (keep a parking lot) ▪ Help participants to summarize discussion, key points, and decisions
Facilitating Brainstorming	▪ Recommend ground rules ▪ Encourage participants to suggest ideas spontaneously without edit ▪ Request a lot of ideas (quantity often leads to quality) ▪ Record suggestions as they are brought up on flip chart for all to see
Using Flip Charts	▪ Prepare flip charts ahead of session when possible ▪ Write clearly, using large print ▪ Use lots of space, leaving room for additional notes ▪ Post flip chart sheets after presenting for easy view
Managing Conflict in Groups	▪ Acknowledge conflicts as they emerge ▪ Look for common ground and or compromise, or make a suggestion for compromise ▪ Identify alternatives or a third solution ▪ Review options