

Strategic Objectives and Action Plan

Best Practice	Planned Activities	Measurement (Expected Results)	Actual Results	Activity Status / Owner(s)
Assessment and Planning <ul style="list-style-type: none"> Formal, written, strategic objectives and project plan 	<ul style="list-style-type: none"> Written plan by 2/15/17 Present plan to Steering Team by 3/1/17 Update plan with report out to and feedback from leadership each quarter 	<ul style="list-style-type: none"> Complete Planned Activities 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> Draft in progress Present at Steering Team on 2/23/17
Support <ul style="list-style-type: none"> Leaders visibly participate in programs Wellness committee actively meets, plans and leads Wellness champions support local participants and plan/lead local activities 	<ul style="list-style-type: none"> Steering Team members sponsor a major wellness initiative or program – 1x/year each Leaders participate and earn incentives at a higher proportion than population Wellness committee meets in person and/or via phone at least 12x/year with 75% participation overall Champions lead or support local activities at least 2x/year each Wellness champions develop and submit written plan for local wellness activities by [date] Wellness champions meet in person and/or via phone at least 9x/year with 60% participation overall 	<ul style="list-style-type: none"> Complete Planned Activities At least x local activities per year (sponsored by wellness champions) of at least [# or % desired participation] 	<ul style="list-style-type: none"> Bi-weekly project team meetings Monthly Champion meetings <ul style="list-style-type: none"> Monthly survey tracking activities and participation of Champion-sponsored activities 	<ul style="list-style-type: none"> Ask Steering Team how they wish to be involved Define ‘leaders’ so we can track progress
Programs <ul style="list-style-type: none"> Effective administration vendor partnership Targeted programs address risk factors and offer something for everyone Healthy food strategy Environment supportive of well-being 	<ul style="list-style-type: none"> Wellness committee meets with vendor via phone/email at least 4x/year Vendor Service Level Agreement is reviewed and enforced annually Wellness committee shares written plan (this document) with vendor; vendor provides feedback on ways to support Programs delivered at the organization-wide level in at least 3 	<ul style="list-style-type: none"> Complete Planned Activities Participation in organization-wide programs of [# or % desired participation] 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> Follow-up with [vendor] to determine how to address gaps in services, share plan with them, identify resources Delivering tobacco-free plan to Steering Team for approval on 2/23

[client name]

[wellness initiative logo]

[date]

- wellness areas: screenings, volunteerism, financial health
- Programs delivered in a variety of formats to offer something for everyone (i.e., group challenge, individual challenge, coaching, etc.)
- Develop and deploy healthy food strategy addressing vending, cafeteria, food at meetings and events
- Develop and deploy written plan to go tobacco/nicotine-free organization-wide

Integration

- With safety, population health (i.e., case management, gaps in care) and others

- Develop plan to integrate with safety and population health
- Determine how well-being can impact the goals of these departments

- Initially: complete Planned Activities
- Subsequent years: Set and achieve quantifiable goals for safety and population health metrics (such as reducing accidents/near misses and Workers' Compensation; reducing gaps in care, increasing case management, reduction in chronic conditions, rolling out utilization management tools)

Participation strategies

- Effectively designed incentives that drive desired behaviors and results and intrinsically motivate
- Ongoing, engaging communications

- Develop 3-year incentives evolution plan, review with leaders, refine update each year; share plan with vendor
- Designate communication team dedicated to well-being communications
 - Team develops plan with monthly communication calendar
 - Deliver monthly materials in a variety of formats
 - Develop feedback mechanism to gather input from participants (i.e. survey)
- Create plan to cascade

- Complete Planned Activities
- x% of eligible participants earn incentive [refine further based on incentive design – i.e., goals for each incentive]
- Incentives paid within x% of budgeted payout

- Meeting with Steering Team 2/23 and follow-ups with vendor to determine how to proceed given limited resources currently available
- Annual Launch underway with many communications
- Continue working on monthly communications

[client name]

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[date]

	communications through appropriate supervisor and leadership channels		
Measurement <ul style="list-style-type: none"> HERO Scorecard Biometric reporting and risk migration Change in health claims expense and expense categories 	<ul style="list-style-type: none"> Complete HERO Scorecard annually Review annual biometric reports to identify key risk factors and progress Annually evaluate health claims to identify trends and contributing factors 	<ul style="list-style-type: none"> At least 5% improvement in total HERO score year over year Improve biometric risk for BMI, BP, cholesterol, glucose, and overall wellness score Migrate risk at least x% total for each category tracked [consider setting \$ amount of cost mitigation] 	<ul style="list-style-type: none"> HERO scorecard completed in October