

**WELCOA's 7 Benchmarks**

Benchmark #4: Carefully Crafting An Operating Plan

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# Carefully Crafting Your Organization's Wellness Plan

Essential Elements That Can Take Your Program  
From Good To Great

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By David Hunnicutt, PhD



WELCOA (The Wellness Council of America) is one of the nation's most-respected resources for building high-performing, healthy workplaces. Over its 25+ year history, WELCOA has perfected its patented Well Workplace protocol which is the key to developing, delivering, and sustaining a healthy corporate culture. Whether you are a workplace wellness practitioner, human resources professional, business leader, or consultant/broker, WELCOA's tools, trainings, and resources will help you better promote organizational well-being and, at the same time, contain escalating health care costs.

### **THE MISSION**

Transforming organizations into high-performing cultures by improving the health and well-being of their employees.

### **FAST FACTS**

- » WELCOA was founded 30 years ago as a resource for building and sustaining results-oriented workplace wellness programs.
- » The WELCOA Nation is the largest network of health promotion professionals in the world made up of over 5,000 Member organizations, 30,000 subscribers and followers, and millions of employees around the globe.
- » More than 1,000 organizations have achieved WELCOA's Bronze, Silver, Gold, Platinum or Small Business Well Workplace Award status.
- » WELCOA has certified over 1,500 health promotion professionals in all 50 states and 5 countries.

## WELCOA's 7 Benchmarks

# Benchmark #4: Carefully Crafting An Operating Plan



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## Introduction

In building a results-oriented worksite wellness program, it is essential to have an operating plan. Indeed, this is the fourth benchmark in the WELCOA model.

From where we sit, the operating plan is the central document that serves as the key piece of communication as to what your program will accomplish. Believe it or not, many organizations underestimate the value and utility of the wellness operating plan. Time and time again, we have seen organizations fail in their attempts to establish a worksite wellness initiative and much of it can be linked back to the lack of an operating plan.

At the Wellness Councils of America, we believe that there are seven essential components of an exceptional operating plan. These seven components include:

1. A Vision/Mission Statement For The Wellness Program That Incorporates The Organization's Core Philosophies;
2. Specific Goals and Measurable Objectives That Are Linked To The Company's Strategic Priorities;
3. Timelines For Implementation;
4. Roles And Responsibilities For Completion Of Objectives;
5. Itemized Budget Sufficient To Carry Out The Wellness Plan;
6. Appropriate Marketing Strategies To Effectively Promote The Wellness Plan;
7. Evaluation Procedures To Measure The Stated Goals And Objectives.

When taken together, these seven components become very powerful in providing you with the empowerment and alignment essential to keep your program moving forward. No matter what the sophistication of your present efforts,

your operating plan will need attention and updating every single year. With that in mind, let's take a brief look at each of the seven essential components of a results-oriented operating plan.

## 1. Vision/Mission

In essence, the vision/mission statement is simply a one or two sentence declarative on what you'd like your program to ultimately accomplish. While many times people struggle with the idea of developing the vision/mission statement, it really doesn't have to be so complicated. Literally, the word vision means "to see." Consequently, the vision statement is what you see in the future for your program. For example, a large health care system developed the vision statement of "Health From Hire To Retire," as their ultimate declarative destination. You can see in one simple phrase, this company has a unique vision of what they want and see for their employees throughout their working history.



## 2. Goals & Objectives

Goals and objectives are an extremely important part of any results-oriented operating plan. In fact, clear goals and measurable objectives will ultimately tell you if you are moving in the right direction. Believe it or not, if you don't have clear goals and objectives, you can't really evaluate any outcomes—because your outcomes are based on what you said you would accomplish. Sadly, many programs don't wrestle with writing goals and objectives up front and as a result, suffer greatly when it comes to demonstrating outcomes. Specifically, you should strive to write SMART objectives.

- S = Specific
- M = Measurable
- A = Achievable
- R = Relevant
- T = Time Based

## 3. Timelines

Picking up from where the goals and objectives section leaves off, it is important to declare specific timelines on when things should get done. Timelines are absolutely important in any operating plan because they overtly state not only what you would like to accomplish, but also when you would like to get it done. Timelines help to hold everyone accountable and provide an excellent measure for how your team is doing. Be warned, timelines are not difficult to write, but they are very challenging to meet. There is an art to setting timelines. Think of it like a pressure cooker—not enough heat and nothing gets done, too much heat and a meltdown occurs.

## 4. Roles & Responsibilities

Identifying the specific roles and responsibilities that your team members should play is the fourth critical part of a results-oriented operating plan. Although it seems straightforward, it is surprising how many operating plans don't specifically identify who or what group is going to be doing what and what they should be doing. When you think about assigning roles and responsibilities, it is important to think of this component in terms of individual strengths and talents.

When taken together, these seven components become very powerful in providing you with the empowerment and alignment essential to keep your program moving forward.

In essence, the people on your team will bring three basic and innate talents/strengths to the table. First, there are relators. Relators are “people” people. They like to interact and they're good at establishing relationships. These people are very important to any team because they bring the human element. Second, there are achievers. Achievers are those people who are uniquely wired to get things done. They like checklists and specific tasks and challenges. These kinds of people are critical to the success of teams because they keep the team on track in terms of getting things done. Finally, there are thinkers. Thinkers like to analyze what needs to be done and to carefully think through how things fit together. Thinkers are critical when it comes to tasks like analyzing data and thinking through the strategic ramifications of this kind of information.

The bottom line on roles and responsibilities is this. Roles and responsibilities should be aligned with individual strengths/talents. Saddling a “thinker” with “relating” responsibilities will only frustrate and complicate the dynamics of your team. Once again, the key is to align and empower individuals with roles and responsibilities that fit their unique strengths and talents.

## 5. Itemized Budget

The itemized budget is the fifth component of a results-oriented wellness program. Although budgeting doesn't get most people excited, it is a very important part of the planning process. It's important because it forces you to think through what you plan to invest in your wellness program and specifically what everything will cost. You'll want to include not only the costs associated with things like health risk appraisals, newsletters, brochures, and incentives, but also to think through what the “softer” costs will be. Softer costs include things like staff time, release time for employees to participate, and team strategic planning meetings. All of these things have very real price tags, so if your budget is to be complete and accurate, it's important to think through how much everything will cost.

## 6. Marketing Strategies

The sixth component of a results-oriented operating plan is the execution of innovative marketing communications strategies. While this section sounds more complicated than it needs to be, there really is no mystery in this component. Marketing and communication strategies simply force you to think through how you're going to communicate the program to your employees and specifically what the messages should be. A good mix of marketing and communication strategies should be used. This mix should include written, oral, and electronic messages. In essence, no one in your organization can be expected to get involved in the program if they don't know what's going on and specifically how they can participate. That's the challenge and the purpose of this component.

## 7. Evaluation

The evaluation section of your plan is the seventh and final component of a results-oriented operating plan. The evaluation section simply and straightforwardly outlines how you plan to measure and evaluate the results that occur from your program. Evaluation measures can and should include things like participation, participant satisfaction, changes in knowledge, attitudes and behaviors, and ultimately changes in environment and culture. Some like to think of evaluation in terms of keeping low-risk employees at low-risk and helping high-risk employees return to low-risk status. However you choose to structure your evaluation efforts, it is essential that your evaluation methods link back directly to the program's goals and objectives.

## Summary

These seven elements should be considered essential to your operating plan. By paying particular attention to the details in each of the elements, you will increase your chances for success exponentially. Remember, the old adage of “failing to plan is planning to fail,” is absolutely true when it comes to worksite wellness programs. ★