



STEP 5:

MAKING DECISIONS  
ON WHERE TO FOCUS  
YOUR EFFORTS

# CONSIDERATIONS

## STEP 5: MAKING DECISIONS - WHERE TO FOCUS YOUR EFFORTS

Now that you have completed the analysis of the worksite assessment, employee survey and other available data (Step 3) and looked at the array of program strategies to be considered (Step 4), it is time to narrow your focus. This can be a very simple process or can be done in a very structured manner – it is up to you.

At this point, you are ready to lay out your wellness program for the year. By planning a year out, you will be able to focus on a coordinated plan instead of putting together a disjointed set of activities.

Here is a summary of what to consider for this step:



**Review Your Data**

**Review Your Assessment Checklist**  
**Review Employee Survey Data**  
**Consider Other Data: Health Assessment, Health Claims and Pharmaceutical Use, if available**



**Select Strategies with Greatest Impact (Reach x Dose)**

**Strategy 1**



vs.

**Strategy 2**



**Create an Annual Calendar and Action Plan**

Strategies	I	E	P	Activities	Who	When	Resources	Evaluation
Provide a pedometer walking campaign	X			Walking Challenge	Jim	April – June	Teams, Captains, pedometers	Pre/Post survey



# REVIEW YOUR INFORMATION

Start with the Worksite Assessment Checklist (Appendix B) that you completed in Step 3. Do a “first cut” by looking at the strategies that you placed in each category (Yes, In Process and No) and determine ones that are potential priorities to improve or implement as new strategies. Now take what you have learned from the employee survey and see if that information changes the list at all. If you have other data from sources such as health risk assessments, health claims information, or pharmaceutical utilization, use those sources as additional background in making your decisions.

At this point, you might be able to decide where to focus your efforts. However, an additional step can help you decide where you will get the most impact, by comparing the relative value of implementing each strategy.

By looking at your current programming, you should be able to see the gaps in areas where there are additional strategies that could be implemented. By identifying those gaps and comparing them with the current health habits and interests of your employees found in the employee survey, you should be able to match high priority gaps with high priority employee needs or interests. Finally, by answering questions about the potential impact to employees, importance, cost, time and effort when implementing program strategies, you will be ready to select what will be included in your wellness program. A model to walk you through this process is included later in this chapter in the form of a Recommendation Table.



## PRIORITIZE: NARROW THE SCOPE

### SCOPE OF IMPACT


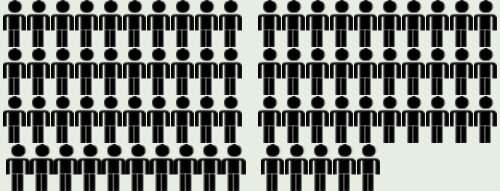
**IMPACT = REACH (# employees) x DOSE (how long and often they participate)**

The key component when making decisions on what strategies to use is to ask the question how much impact will there be with a selected strategy? Although you cannot answer this question specifically, you can estimate the impact by looking at the “reach” and “dose” of the strategy. Reach would be the number of employees who would likely be participating and dose would be how long and how often they would participate in the strategy.

#### **Physical Activity Example: Worksite with 100 Employees**

For purposes of this physical activity example, there are 100 employees and one dose of activity is equal to 10 minutes. The adult goal is at least 30 minutes per day or three doses.

*One dose = 10 minutes. Adult goal is 30 minutes per day or three doses. Reach = number participating*

Scenario 1 - Worksite holds a 1-day event where 75% of staff walk for 30 minutes (3 doses).		Scenario 2 – Worksite institutes a new policy that encourages daily 20-minute “walk breaks” at lunch.	
<ul style="list-style-type: none"> <li>75% of staff participate</li> <li>Impact is 3 doses x 75 people = 225</li> </ul>		<ul style="list-style-type: none"> <li>25% of staff participate regularly (3+ days/ week)</li> <li>Impact is 2 doses/day x 25% of staff = 50 doses/day x 150 days = 7,500</li> </ul>	
<p>Total impact = 225</p>  <p>1 person icon = 100</p>		<p>Total impact = 7500</p> 	

In this example, the noontime walking policy will have considerably more impact. That is not to say that a 1-day event is not a good idea to increase visibility or kick-off a longer campaign, but the noontime policy will have significantly greater impact.

Although impact is often the most important consideration in prioritizing what strategies to use, you should also consider factors such as:

- ❖ How important is the strategy (high in interest survey, identified gap in assessment, etc.)?
- ❖ How much will it cost?
- ❖ How much time and effort will it require to implement?

### Be realistic!

Limit your initial set of activities so you can focus your efforts and have some early successes. You can always expand your program as it matures, but a realistic set of objectives to begin with will require fewer resources and will keep you from being overwhelmed.

## ANNUAL CALENDAR and ACTION PLAN

### CALENDAR AND ACTION PLAN

After determining your priorities and prior to starting your wellness program or prior to each new year, your wellness committee should lay out your activities for the year. Creating an annual plan will deliver a better-coordinated program and identify the resources and timing needed to have the most impact. Many programs have some activities running year long, but they focus on quarterly initiatives to increase the opportunity for more “doses” over a concentrated 6 - 12 week period.

If you have a well-developed wellness program, that might mean looking for programming through a variety of ways. A starter list of possibilities might consist of components such as a kick-off promotion, education materials, presentations, training/class opportunities, tracking campaigns, policy changes and

environmental changes. Provided below is a sample of what a high-level calendar might look like (see Appendix E for a blank worksheet).

ANNUAL CALENDAR												
	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Topic Focus Components	Emotional Well-Being			Physical Activity		Nutrition			Financial			
Biometric Screenings												
Health Assessment												
Employee Survey												
Education Materials												
Coaching												
Webinar												
Campaign												
Trainings (Employee Wellbeing)												
Environment Change (Cultural Wellbeing)												
Policy Change (Org Wellbeing)												
Other												

After you lay out your high-level annual plan, you need a more specific action plan that describes specific activities and the related resources needed to make it happen. To expand on the annual plan shown above, here is a more detailed example of a physical activity initiative for the spring quarter from April to June. Knowing that physical activity is the focus would mean that you could look for ways to incorporate that into your programming and strategies.

### Action Plan

Record specific information in an action plan to implement the programming you have selected. The action plan would include:

- ❖ The overall goals and objectives of your wellness program
- ❖ Specific recommendations on strategies to implement. These need to be clearly stated and measurable or your evaluation won't be meaningful
- ❖ The chosen activities
- ❖ The staff, resources and materials needed to make it happen
- ❖ The time frame for completion
- ❖ The evaluation plan to measure results



ACTION PLAN WORKSHEET - SAMPLE (Blank form in Appendix F)								
Focus Area			Implementation dates					
Strategy Description and Type			Describe the strategy and whether it's individual programming (I), an environmental change (E) or a policy change (P)					
Activities			List the activities required to meet the recommendation					
Who			Lead person(s) responsible for the activity					
When			Date or date range when the activity will occur					
Materials and Resources Needed			List the resources and tools they need to get the job done.					
Time Frame			When will implementation begin? How long will it take to finish?					
Evaluation			How will you measure your successes and/or misfortunes?					
Focus Area: Physical Activity			Implementation Dates: Specific Months of <u>April to June</u> or All Year _____					
Strategies to Implement	I	E	P	Activities	Who	When	Materials and Resources	Evaluation Method
1. Provide incentive based programs to encourage activity (i.e. pedometer walking campaigns).	x			Walking "Challenge"	Jim	3 months April- June	Walking teams, Team Captains Pedometers, Recording sheets	Pre/Post survey of activity levels
2. Develop and post walking maps of varied distances from the worksite.		x		Print maps of varying distances	Mary	By April 1	Mary Smith	Pre-post count of number of staff walking
3. Support physical activity during duty time (flextime).			x	Draft and implement company policy on use of break and lunch time for activity	Bob	By March 1	Wellness committee and staff input Management OK	Policy in place. Include in annual survey.

(A blank version of this worksheet is in Appendix F)

The above sample illustrates one way to think about tying your potential programming together in a focused way. By “packaging” your strategies on a specific focus area, the activities build off each other rather than presenting a variety of unconnected activities. This coordinated mix of program strategies can provide a multiplier effect that is greater than the effect of adding up individual activities. “Packaging” related strategies will lead to greater participation and long-term success. For instance, having a policy that encourages physical activity on break time, coupled with using pedometers as incentives and then providing maps or on-site trails to get staff out walking will lead to greater success than any one of these strategies done in isolation. *One warning about packaging:* Keep in mind that it is better to take on less and do a great job with high participation rates rather than try to do too much and have a poorer response.

