

## Operating Plan

Having an operating plan is an important part of a successful worksite wellness program. An operating plan helps to ensure that everyone is aware of the priorities of the program and the steps to accomplish them, as well as who is responsible for which tasks and activities. An operating plan is a key component to ensure continuation of worksite wellness programming when an organization is experiencing employee turnover of members on the wellness team.

WELCOA recognizes seven components of an operating plan:

- Vision/Mission Statement
  - One or two sentences, declaring what you'd like your program to accomplish
  - Example: "Health from Hire to Retire"
- Goals and Objectives
  - Helps you to continuing heading in the right direction to accomplish your goals.
  - Goals and objectives help you to evaluate your outcomes.
  - Goals and objectives should be SMART: Specific, Measurable, Achievable, Relevant, and Time Based
- Timelines
  - Help to keep your goals and objectives realistic
  - Assists in measuring progress towards outcomes
- Roles and Responsibilities
  - Holds people accountable
  - Helps to ensure everyone plays a part, and that the workload is equitable
  - Align roles and responsibilities with talents and strengths
- Itemized Budget
  - Forces you to think through all possible costs for programming
  - Consider costs for printing, incentives, health risk appraisals, and other supplies
  - Don't forget to include costs like staff time
  - Budgeting Principles
    - Top-down: You have "X" amount of money to spend on wellness programming
    - Bottom-up: You submit a budget itemizing the program offerings. In this scenario, you must be able to justify initiatives and cost.
  - Budget Justification
    - Plan programs that produce results at different intervals in order to always have some data to present to management
    - Determine, with management, when cost justification data will is expected
    - Share data with management on a frequent basis

Sources:

Wellness Councils of America, 2005; [www.welcoa.org](http://www.welcoa.org)

"The Fundamentals of Evaluation," WELCOA, 2007, [www.welcoa.org](http://www.welcoa.org)

"Carefully Crafting Your Organization's Wellness Plan," David Hunnicut PhD, WELCOA, 2007, [www.welcoa.org](http://www.welcoa.org)

"Building Your Wellness Budget," Joseph A Leutzinger PhD, WELCOA, 2006, [www.welcoa.org](http://www.welcoa.org)



- Budget Sustainability
  - Work on having resources consistently dedicated on an annual basis, so other “hot” issues don’t threaten your funding.
  - Target inefficient programs. Eliminating these programs frees up resources.
  - Integrate some initiatives with another department. You may decrease your control of the initiative, but you also increase resources for the program, as well as the program exposure and credibility.
- Marketing/Communication Strategies
  - Communicate early, often, and in several formats (written, oral, and electronic)
- Evaluation
  - Determine what you’re going to measure for each initiative, how you’re going to measure and when
  - What to Measure: participation; participant satisfaction; changes in knowledge, attitudes, behaviors, environment, and culture; productivity; biometric measures; medical claims
  - How to Measure: program registration sheets; participant satisfaction surveys (mid & post); self-reported behavior surveys; HRA results, biometric testing, screening results; productivity questionnaires; medical claims comparisons
  - When to Measure:
    - Ongoing—participation, participant surveys
    - Annual—personal health assessments/HRAs, wellness interest survey, annual health fair with individual screenings
    - Bi-annual—medical claims analysis, organizational health and productivity audit

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