

▶ Strategic Planning for Employer Well-Being Initiatives

Process

Employers with a formal written plan for wellness are 56% more likely to report positive cultural and health outcomes (HERO scorecard study, 2016). Trained Findley Davies facilitators can support your strategic planning process, helping engage leadership and other internal stakeholders in developing a 3-5 year health and wellness roadmap. Through this process we:

- Identify key wellness initiatives which may include: champion network, wellness dashboard, future incentive approach, expanding program to cultural initiative
- Determine objectives, which may include: cost strategy, how benefits should support wellness, what employer and employees should each be responsible for, what training and communications are needed
- Review existing resources and brainstorm opportunities for more effective use and collaboration
- Gain consensus on priorities
- Develop plan, owners, and timing to achieve wellness objectives

Format

We use a “Compression Planning” technique which is a proven process to reach consensus on strategic objectives in a compressed timeframe. The steps include:

- 2-hour planning meeting with you to develop framework (session objectives, background, brainstorming questions, topics, attendees, timing, logistics)
- Within one week, we review background, evaluate gaps, and finalize session design
- 3-4 hour brainstorming session with key leaders and stakeholders (executives, finance, HR, others)
 - Interactive process using story boards and participant collaboration to prioritize objectives and steps
 - Our firm’s leader facilitates session
 - FD (with support from client) shares background information and notes any gaps, inefficiencies, and opportunities
 - We asks a series of questions, starting broadly then narrowing focus, to identify objectives and create a prioritized action plan

Deliverables

The deliverables include the session report and 3-5 year wellness roadmap.

- After Compression Planning, you receive an initial report with ideas, priorities, and immediate action plan from session
- Building from the session report, we create a 3-5 year wellness roadmap/action plan with prioritized objectives of wellness, a quarterly action plan to achieve objectives over a multi-year period, and tasks, timing, and approximate needed resources to complete each step. Also included in this report are recommendations to more effectively leverage and promote collaboration of existing resources and an infrastructure and governance model.

“With your help, we developed a strategic plan to prioritize our wellness initiatives and created a communications workplan with consistent messaging. As a result, we had four times more people participate this year, surpassing our goals.”

*Kate Lawrence
Associate Director of
Employee Health & Wellness
MetroHealth*

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