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PLANNING GUIDE FOR LOCAL WORKPLACE WELLNESS INITIATIVES

This planning guide is designed to help organise and coordinate a successful local workplace wellness initiative. Complete the Activity Plan to prepare for the initiative. Once completed, share it with management to review and endorse to truly embed the initiative within your organisation.

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| **Activity Name** |  | **Targeted Health Issue/ Wellness Focus** |  |

**Assess**

STAGE 1: Needs assessment

Summarise the current state related to your initiative. You many know these answers already. In some cases, you may benefit from getting feedback from employees to better understand their needs. You could do this by observation, polling during a work meeting, sending a short survey to relevant employees or facilitating a focus group.

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| **What is the current state?**  Summarise the extent of the issue or opportunity (for employees and/or the organisation). Is this issue or activity already in place elsewhere within the organisation? |  |
| **How many people in the workplace are eligible to participate in this initiative?**  Think of the maximum amount of people who this activity could reach or could potentially become involved. |  |
| **How many people would be interested in this initiative?**  Of all the eligible employees, how many are realistically likely to be involved? |  |
| **What benefits could be achieved?**  What employee and/or organisational benefits could be achieved through this activity? |  |

**Design**

STAGE 2: Designing your initiative.

Map out and detail your activity - develop your plans to make sure that it is set up for success.

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| **Activity Description**  Describe the proposed activity. |  |
| **Success Factors**  What are the goals of this activity? How do they compare to the current state (from the ‘Assess’ stage)? |  |
| **Target Group**  Which employees/groups are you seeking to engage? |  |
| **Dates**  Proposed start and finish dates of the activity. |  |
| **Times**  Proposed time of day the initiative would be on/available. Consider how to have the most convenient time for your key target groups. |  |
| **Estimated Participants**  How many people are estimated to participate? What is minimum number of participants needed to procced? What is the maximum number of participants the activity can accommodate? |  |
| **Stages of Behaviour Change**  Considering the stages of behaviour change model, which categories is this activity most relevant to? How have you factored this in to reach as many people as possible? | *Pre-contemplation, Contemplation, Preparation, Action, Maintenance (and relapse)* |
| **Barriers to success**  What potential barriers are there to the activity being successful? |  |
| **Enablers of success**  What will enable this activity to be successful? |  |
| **Environmental impacts**  How will you minimise any environmental impacts from this activity? |  |

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| **Co-ordination**  Who will be responsible for all aspects of the activity? How much time will they need to commit? Will there be external partners, if so who? |  |
| **Champions & Advocates**  Who will play a proactive role in championing this initiative? Having senior management formally endorse and actively advocating will increase participation. |  |
| **Expenses**  What expenses are there for the activity? |  |
| **Funding**  How will the expenses be funded for this activity? |  |

**Implement**

STAGE 3: Implementing your initiative.

Ensure your implementation plan is set up from the start to maximise momentum throughout.

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| **Promotion & Recruitment**  How will you promote for employees to join the activity? Consider that people often need to hear a message multiple times before action is taken. Will you offer any incentives? |  |
| **Maintaining Engagement**  How will you monitor engagement and support ongoing participation? |  |
| **Feedback**  How will you get feedback so you can adjust the activity as needed throughout implementation? |  |

**Evaluate**

STAGE 4: Evaluating your initiative.

Define your evaluation at the start so you can be sure to have any necessary baseline metrics needed for comparison later on.

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| **Success Factors**  Reflecting on your success factors/goals listed in the ‘Design’ stage, how will you re-measure these? |  |
| **Impacts**  How will you measure the impacts your activity has had?  i.e. behavioural change |  |
| **Outcomes**  How will you measure the outcomes your activity has had?  i.e. reduced sick leave |  |
| **Communications**  Who will you communicate the success of your activity with? Is it senior management and/or employees? How will you share the results? Will you use success stories to spread the news throughout the organisation, or to encourage further participation? |  |