



Action Planning



Prevention Campaign Fact Sheet

Vision of the [National Prevention Strategy](#): Working together to improve the health and quality of life for individuals, families, and communities by moving the nation from a focus on sickness and disease to one based on prevention and wellness.

Action planning is a systematic change-management process that allows Worksite Health & Wellness Coordinators to address program shortcomings and develop actionable plans for improving the weaknesses. Action plans can help Coordinators set, achieve, and evaluate goals. A successful action plan:

- Establishes vision, conveys positive energy, and motivates change;
- Aligns with organizational strategy and culture;
- Clearly outlines timelines, responsibilities, and needed resources; and
- Identifies internal sources of knowledge or capabilities and ensures an actionable change strategy.

Needs assessments and evaluations can form the foundation for the development of action plans. For more specific information, please see the U.S. Office of Personnel Management's (OPM) fact sheets on: (1) Needs Assessments, and (2) Program-Development Evaluation Model.

ACTION PLANNING PROCESS



1. ENGAGE STAKEHOLDERS

Stakeholder engagement enables agencies to obtain input and participation from people who will be affected by the results of the action plan. The approach for obtaining involvement can be: (1) employee driven (bottom-up); (2) leadership driven (top-down); or (3) a combination of both. Employees are usually the best source for information identifying main programmatic issues, and stakeholder involvement optimizes the effectiveness of the action planning process. Agency leaders should also be involved to help quickly and effectively address issues and to help set priorities.

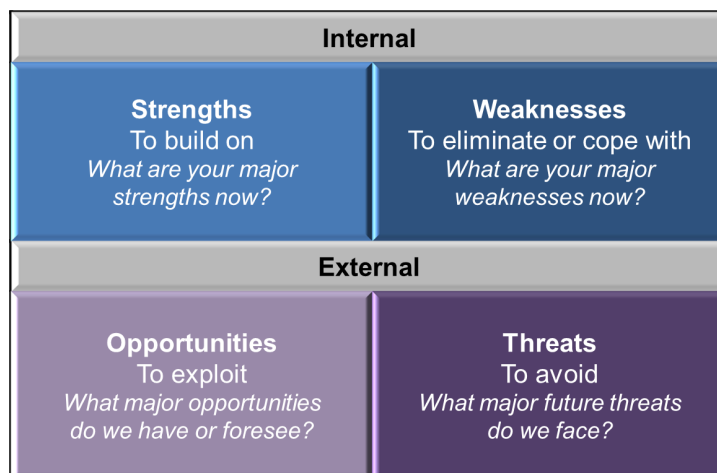
2. IDENTIFY AND PRIORITIZE OUTCOMES

Agencies should identify and prioritize outcomes that enable worksite health & wellness programs to transition to a desired future state. Agencies' action planning teams should identify the strengths and challenges with the specific program, discuss the findings, and group the strengths and challenges by clusters and labels. The strengths and challenges should then be prioritized for action based on:

- **Burden** (number of employees affected, magnitude of health effects, economic cost, etc.)
- **Feasibility** (level of difficulty in implementing the change, time and cost considerations, etc.)
- **Control** (who has the ability to implement the program changes)
- **Impact** (health benefit of the program, evidence-based interventions, availability, etc.)

3. **ANALYZE CONDITIONS**

Agencies should analyze people, technology, processes, and financial resources required to accomplish outcomes. A good way to do this is through a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis. SWOT is a tool that allows for a subjective assessment of a program's current position and potential future.



4. **DEVELOP ACTIONS AND GOALS**

Agencies then develop actions that result in clearly defined outcome goals, using a Specific, Measurable, Achievable, Realistic, and Time-bound (SMART) approach. Agencies may then determine appropriate new actions to support employee health, as well as building upon current activities.

5. **SPECIFY ACTION STEPS**

Agencies should specify action steps by determining: what needs to be done; when; who will be responsible; and what resources are needed. Create timelines and an itemized budget. Define roles and responsibilities, and consider partnerships.

6. **EVALUATE**

Agencies should also regularly evaluate the progress of programs (see OPM's fact sheets on: (1) Evaluation Overview for Worksite Health & Wellness Programs, and (2) Program-Development Evaluation Model).

(Adapted from [Workplace Health Promotion-Workplace Health Improvement Plan](#), 2013; [Healthier Worksite Initiative – Planning](#), 2010; OPM's EAP Administrator Training, 2014)

RESOURCES & GUIDANCE FOR WORKSITE HEALTH & WELLNESS COORDINATORS

[OPM's Health & Wellness Evaluation Page](#)

This website describes Federal resources that can be used to evaluate worksite health & wellness programs. Agencies are encouraged to use those that best meet the needs of their agency.

[U.S. Department of Health and Human Services \(HHS\) Centers for Disease Control and Prevention \(CDC\) Workplace Health Promotion – Workplace Health Improvement Plan](#)

Here you can access many resources and information to create an action plan for worksite health & wellness programs.

[HHS CDC's A Framework for Evaluation](#)

This website showcases a systematic way to improve and account for public health programs.