Step 4: Develop a Plan

Strategic Plan

First, you will need to develop a strategic plan, which will set a direction for your wellness program. Identify what your goals and objectives are and then what strategies you will use to pursue them. A strategic plan is a resource for leadership and relevant stakeholders to use as a general guide for organization and management.

For more support developing your strategic plan, download The Bridgespan Group’s guide.

Operational Plan

Your operational plan includes detailed information about what your program is and how you will implement it. It answers questions such as:

- What strategies, tasks, and activities will you undertake?
- Who on your leadership team will be responsible for each task?
- When does each task need to be completed? What is your timeline?
- How will you complete each task or activity? How will you allocate resources like funding and time?

When developing the operational plan, select activities and events according to the responses you collected from the health assessment and interest surveys. This information will guide you in selecting activities that will be the most successful in addressing your participants’ needs. Your operational plan should include useful local resources and relationships for any needed materials, funding, and support. Use the checklists provided at [link] to help ensure every component of a successful wellness program is included in your intervention.

The following are some examples of wellness activities that could be offered in a program setting:

- Health education classes
- Exercise sessions (Zumba, Pilates, yoga, etc.)
- Nutrition classes and support
- Stress management training
- Healthy cooking classes
- Emotional/social support groups
- Running, walking, or biking clubs
- Subscriptions to online resources
- Participation in CSA (Community Supported Agriculture)

**Tip:** Be sure to include a Waiver and Release of Liability for employees who participate in physical activity and exercise sessions. A sample waiver is available later in this toolkit.