



# Beyond Fear: The FUNdamentals of Planning for impact in your program!

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# Goals



- Understand the importance of planning for outcomes
- Understand the **FUN**damentals of planning
- Create goals and steps to implement at your worksite

# Why Plan?



- ✓ Worst Planning Experience
  - ✓ Think about your most difficult planning experience
    - ✓ Share with the person next to you three things that made it so hard
  
- ✓ Best Planning Experience
  - ✓ Think about your best planning experience
    - ✓ Share with the person next to you three things that made it FUN!
  
- ✓ Report to the group what you discovered



# What is the FUN in planning??



- Focus and define your programs for impact
- Understand the needs of your participants/ company
- kNow what works



# Why do I need to look at data?



- Brainstorm.....
  - To determine risk areas
  - To determine employee interest
  - To see trends
  - To plan for impact
  - To evaluate success
  - To make course corrections along the way

# What data?



- Utilization
- Pharmacy
- EAP
- Health Assessment
- Employee Interest
- Information on Organizational Health
- Workers Compensation
- Participant Evaluations
- Other?



# Where do I get the data I need?



- Carriers – Utilization, Pharmacy, EAP
- Vermont data – VDH
- National Data – CDC/ NIH
- Employee surveys and evaluations
- Health Assessment
- Program evaluations
- Other?



# Now that I have data, what do I do with it???????



- Review all data to determine your risk areas and costs
- Create Measurable Goals and Objectives
- Create a plan with activities, timeline, lead people, and evaluation
- Plan, Do, Check, Act!!!



# Moving from Activity to Outcome



# What are the steps along the way?



- Vision
- Mission
- Goals
- Measurable Objectives
- Activities
- Evaluation



# Vision and Mission



- **Vision:** Defines desired or intended future state in terms of fundamental objective and/or strategic direction.
  - Future/ Long term
  - Source of inspiration
  - Provides clear decision-making criteria/ describe what we want to be
- **Mission:** Defines the fundamental purpose, succinctly describing why it exists and what it does to achieve its Vision.
  - defines the customer and the critical processes
  - Informs desired level of performance

# Goals and Objectives



- **Goals**
  - Can't be validated as is
  - Broad, General intentions, Intangible, Abstract
- **Objectives:**
  - Can be validated
  - Narrow, Precise, Tangible, Concrete

# Measures for success!



What kinds of measures are there?

- Input
- Output
- Process
- Outcome



# Input

Inputs measure resources dedicated to specific programs, or what we put in.



# Output

Output measures are often stated in nonfinancial terms, and report what comes out.





These measures compute either inputs/outputs or inputs/outcomes indicators and provide information on how efficient an organization is at achieving its program goals.



Outcome measures gauge how well a program accomplished its goal.



# Outcome-Based SMART Goals & Objectives



**S**  
**M**  
**A**  
**R**  
**T**

**Specific**  
**Measurable**  
**Achievable**  
**Relevant**  
**Time Based**



# Do I have the “right” Measures?

## A quick checklist!



- ✓ Metrics/data available
- ✓ Relevant to objective
- ✓ Inform process
- ✓ Most Appropriate
- ✓ Agreement



# For Best Results...



Have and use a mix of measures and be sure they are SMART!

- Input
- Output
- Process
- Outcome





- | Item                         | GOOD | BETTER | BEST |
|------------------------------|------|--------|------|
| > Vision/Mission Statement   | GOOD | BETTER | BEST |
| > Goals and Objectives       | GOOD | BETTER | BEST |
| > Timelines                  | GOOD | BETTER | BEST |
| > Roles and Responsibilities | GOOD | BETTER | BEST |
| > Itemized Budget            | GOOD | BETTER | BEST |
| > Marketing Strategies       | GOOD | BETTER | BEST |
| > Evaluation Procedures      | GOOD | BETTER | BEST |

# From Goal to Action!



- Action Plan
  - Using the sample action plan work in teams of 2-3 to create a plan and fill in the template.
  - What did you find?
  - What worked?
  - What was challenging?
  - How might you use this tool in your program?

# Putting the puzzle together



Data  
Analysis

Communication  
Plan

Programming

Best Practices

Winning  
Wellness  
Programs

Incentive  
Design

Evaluation

Reporting

Resources

# A winning strategy!!



- Have a PLAN!
- Alignment with other programs
- Support from Leadership
- Utilize all Resources
- Employees Input
- Build on best practice
- Evaluate to make course corrections along the way

# SUCCESS!!



- Better planning and communication
- More strategic focus
- Better outcomes
- And happier employees!



Questions?



**Thank you!!!!**

