



Women of Wellness

Stronger together through .love

Four-Phase Wellness Program Planning Template

Lead with Well-Being: A Woman's Strategic Guide to Transforming Workplace Culture

Your Organization: _____ Date: _____

Current Phase: ☐ Phase 1: Assessment ☐ Phase 2: Goal-Setting ☐ Phase 3: Implementation ☐ Phase 4: Measurement

PHASE 1: ASSESSMENT WITH INTERSECTIONALITY

Assessment Methods I'll Use: (Check all that apply)

- ☐ Anonymous surveys
- ☐ Focus groups (specify groups: _____)
- ☐ Individual interviews
- ☐ Existing data analysis (HR/health data)
- ☐ Other: _____

Demographics I'll Disaggregate By:

- ☐ Gender ☐ Race/ethnicity ☐ Caregiving status ☐ Department ☐ Role level ☐ Other: _____

Key Questions to Explore:

1. What are our biggest wellness gaps?
-



Women of Wellness

Stronger together through .love

2. Who is underserved by current programs?

3. What barriers prevent participation?

Baseline Metrics to Establish:

- Current participation rate: _____% | EAP utilization: _____% | Turnover rate: _____%

- Engagement score: _____ | Absenteeism rate: _____% | Other: _____

Timeline: Start: _____ Complete by: _____

PHASE 2: GOAL-SETTING & PROGRAM DESIGN

Our Wellness Vision (1-2 sentences):

SMART Goals by Dimension:

Dimension	Specific Goal	Baseline	Target	Timeline	Owner
-----------	---------------	----------	--------	----------	-------

Mental Health

Work-Life Integration

Equity & Inclusion



Women of Wellness

Stronger together through .love

Dimension	Specific Goal	Baseline	Target	Timeline	Owner
-----------	---------------	----------	--------	----------	-------

Physical Health

Programs We'll Design/Enhance: (Based on assessment findings)

1. _____
2. _____
3. _____

How These Goals Support Business Objectives:

PHASE 3: IMPLEMENTATION & LAUNCH

Launch Strategy:

- **Pilot program(s):** _____
- **Pilot timeline:** Start: _____ Feedback review: _____ Full launch: _____
- **Communication channels:** ☐ Email ☐ Town halls ☐ Posters ☐ Manager meetings ☐ Other: _____

Visible Leadership Actions:

- ☐ Executive sponsors publicly announce commitment



Women of Wellness

Stronger together through .love

- ☐ Leaders participate in programs
- ☐ Wellness integrated into leadership goals
- ☐ Other: _____

Measurement Infrastructure Setup:

- ☐ Participation tracking system in place
- ☐ Post-program feedback surveys ready
- ☐ Dashboard template created
- ☐ Privacy protocols established

Quick Wins (0-3 months):

1. _____
 2. _____
-

PHASE 4: MEASUREMENT & CONTINUOUS IMPROVEMENT

Key Metrics I'll Track Monthly:

1. _____
2. _____
3. _____

Metrics I'll Review Quarterly:

- ☐ Participation by demographic ☐ Health outcomes ☐ Engagement scores ☐ Financial metrics (ROI)

How I'll Analyze for Equity:



Women of Wellness

Stronger together through .love

- Disaggregate all data by: ☐ Gender ☐ Race ☐ Caregiving status ☐ Department ☐ Other: _____
- Identify participation gaps and investigate root causes

Feedback Loop Plan:

- **Share results with employees:** ☐ Monthly updates ☐ Quarterly reports ☐ Annual comprehensive review
- **Channels:** ☐ All-hands meetings ☐ Newsletter ☐ Dashboard (accessible to all) ☐ Other: _____

PDSA Cycle Commitment:

- **Plan:** Based on data, what will I adjust?

- **Do:** Launch change/pilot (Timeline: _____)
- **Study:** Measure outcomes (Review date: _____)
- **Act:** Scale what works, stop what doesn't (Decision date: _____)

IMMEDIATE NEXT STEPS (List 3 actions you'll take THIS WEEK):

1. _____
 2. _____
 3. _____
-

ACCOUNTABILITY



Women of Wellness

Stronger together through .love

Who I'll share this plan with:

My support team:

Progress check-in dates: _____

Resources & Support: Download additional templates at womenofwellness.love/lead-with-well-being-book

Notes/Reflections:

This template works best when you:

- Complete it collaboratively with your wellness committee or leadership team
- Revisit and update quarterly as you move through phases
- Use data to inform each phase (not assumptions)
- Center equity and intersectionality in every decision