



# 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](http://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