



**Development Cycle Step: Planning**  
**Module 2: Selecting goal and objectives and**  
**choosing appropriate interventions based on program priority**  
**Key Takeaways and Action Checklist**

## Key Takeaways

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In this module you learned:

1. **How to facilitate a planning session using the Strategic Planning Process**  
The Strategic Planning process is a process of facilitating a discussion on initiative goals and objectives
2. **How to select a goal and objective statements that support the program priority**  
The goal and objective statements identify the specific focus of the initiative for the next year.
3. **Choose appropriate interventions to support the goal and objectives**  
The interventions are the specific programs or policies that will be implemented to achieve the goal/objectives.
4. **What program evaluation is and how it helps identify what is working well and what needs to be changed or improved.**  
Evaluation helps to define the effectiveness of the wellness initiative.
5. **Complete the Planning section of the Worksite Wellness Action Plan**  
The Planning section defines the details of what the initiative will accomplish and how it will be accomplished. This document will be used to guide the initiative implementation.

## Action Items Checklist

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1. **Select Goal and Objective Statements**  
The Champion and Sponsor review the *Planning Facilitation Guide* to organize the planning session to select goal and objectives statements. Download the *Goal and Objectives Guidance Document*. Complete the goal/objective section of the *Worksite Wellness Action Plan* document.
2. **Select Interventions and Complete WWAP**  
The Champion and Wellness Committee select the interventions for each objective statement and the Planning Section of the Worksite Wellness

Action Plan. Be sure to link identified baseline data with the evaluation column of the WWAP.

- 3. **Budget Planning**  
The Champion and Wellness Committee identify the high-level budget for each objective. Complete the ***Budget Planning Worksheet*** document.
  
- 4. Update the **WWAP and Budget Planning Worksheet in the Online Portal**. Enter the ***Worksite Wellness Action Plan***, with planning section complete, and ***Budget Planning Worksheet*** to the online learning portal.