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| **Overview of where we are and where we’d like to be** |
| *Current Situation* | *Desired Achievement* |
| What policies & practices do we have in place regarding the following? | How would we like our initiative to affect these existing policies & practices? |
| Physical work environment |  |  |
| Employee personal health resources |  |  |
| Company community involvement |  |  |
| Psychosocial work environment |  |  |
|  |
| What is our current workplace culture? | What is our desired workplace culture? |
| Core Values |  |  |
| Other assessments |  |  |

What are the obvious gaps between where we are (current situation) and where we’d like to be (desired achievement)?

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| **Baseline Assessment** |
| What are our current wellness initiatives? |
| Initiatives |  |
| Resources used (staff, space, time…) |  |
| After reviewing the sample baseline assessment surveys and information-gathering tools on the Healthy Workplace Framework website, work with staff members in Human Resources, Wellness or Health Promotion, Occupational Health, Health & Safety, Accounting etc. to determine the kinds of information you can feasibly assess (and with confidentiality): |
| *Employee Health Status*(examples include employee demographics, formal health-risk assessments, surveys to assess employee lifestyle behaviours etc.) |  |
| *Employee Participation*(examples include, employee health concerns, types of health programmes employees find valuable, employee perceptions of workplace culture, workplace stress, job satisfaction etc.) |  |
| *Objective Analytics*(examples include sickness & injury data, workplace related injuries & illnesses, short-term & long-term disability, employee turnover/retention, union grievances, concerns that have arisen from workplace inspections etc.) |  |
| *Financial Review*(examples include budgets, utilisation & allocation of resources etc.) |  |

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| **Setting Objectives** |
| Based on your findings on *Employee Health Status*, what areas need improvement? |  |
| Based on *Employee Participation*, what areas are staff most concerned about? |  |
| Based on the *Objective Analytics*, what areas need improvement? |  |
| Based on the *Financial Review* are there any opportunities for sharing resources or optimising budgets? |  |
|  |
| Use the above information to set objectives that reflect your needs. |
| *Objective 1* |
| What, specifically do we want to achieve with this objective?(Who & What) |  |
| How will we measure success of this objective?(By How Much) |  |
| Is this objective realistic or feasible?(How) |  |
| Is this objective relevant to our core values or the overall goal of our workplace wellness pursuits? (Why) |  |
| What is the timeframe for achieving this objective?(When) |  |