

# Assets and Liabilities • Vision and Mission

## Conduct an Assessment of Financial and Human Assets and Liabilities

**Goal:** Create a baseline of information and identify human and organizational needs.

**Focus:** Review a variety of information to better understand past and current conditions regarding health-care utilization, organizational culture, demographic overview, and health-promotion initiatives.

Data collection plays an important role in planning, monitoring, and evaluating a wellness program. It will also set the baseline for continued and future evaluations of program efficiency, effectiveness, and feasibility.

### Actions:

- **Claims review (health care, pharmaceutical):**
  - What have been the 10 most costly major disease categories in each of the past five years? What are the number of claims and dollars paid for each?
  - What have been the 10 most costly therapeutic classes of drugs in each of the past five years? What are the number of claims and dollars paid for each?
  - What have been the 10 most frequently prescribed and filled therapeutic classes of drugs in each of the past five years? What are the number of claims and dollars paid for each?
- **Demographic analysis of employee population (may include dependents):**
  - List your number of employees, by gender, for each of the past five years and the percentages of males and females by age groups.
  - Think about any other factors that may have affected the health of your employees and their use of the health-care system. This may include mergers, acquisitions, workplace trauma, employee strikes, layoffs, early retirement offers, etc.
- **Management survey:**
  - Conduct surveys of mid-level management to understand their concerns and measure their level of interest and buy-in.
  - Employee-interest survey: Gather information to find out what the employees want and to measure the level of participation, satisfaction, and “success” of any previous activities.
- **Risk data (health-risk assessments):**
  - Is there any data from health-risk appraisals over the past five years?
- **Participation in similar activities:**
  - List and describe all wellness initiatives that have been implemented over the past five years, including participation rates.
- **Design of the health plan, and anticipated changes:**
  - Have there been any significant changes in the health plan’s design in each of the past five years, such as a change from an HMO to a PPO, increased co-payments or deductibles, or increased employee contributions?

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## Create Clearly Stated Vision, Mission and Outcomes

**Goal: Establish a clear vision of program direction, expectations, and measures.**

**Focus: Setting a vision, mission, goals and objectives to keep your worksite wellness program focused toward its desired outcomes. It will answer the questions, “Where are we going?” and “How will we know when we get there?”**

### Actions:

- Identify two to five clearly stated goals. Be sure that your program is capable of having an impact in the area desired, and be sure that you are capable of measuring that impact.

### Example Goal: Employees having access to healthier food options

- Establish two to five measurable objectives that specifically state what your program is going to accomplish, by when, how, and how it will be measured.

Example Objective: Modify all vending machines to include 50 percent healthy food options.

- Identify several activities that will help you achieve your objective. Activities are very specific.

Example Activity: Work with vending machine owners to identify healthy food options and restock with 50 percent of items that are healthier food options..

- Identify who is going to do what, by when, and what resources are needed.

Example Detail: The Program coordinator will contact XXX Vending Company by September 30.

