

# **HERO Five Year Strategic Plan 2016-2021**

*HERO will accomplish our goals through research, collaboration, education and dissemination.*

## **Executive Summary**

HERO members and our Board's leaders are passionate about health and well-being and share a desire to give back to the health promotion profession. Visioning exercises reveal a strong interest in advancing the application of science to practice and a serious intent to solidify the business case for investing in health and well-being. The "2011-2015 Business Plan" and the subsequent successes in building a solid organizational infrastructure has laid the foundation for HERO to continue growing as an organization. This "HERO 2016-2021 Strategic Plan" adds goals intended to influence nationwide trends in the use of evidence informed best practices in health promotion.

The HERO Health and Well-being Best Practices Scorecard in Collaboration with Mercer© (HERO Scorecard) has been considered by staff and Board members alike as a key vehicle for advancing best practice concepts, identifying where more education and advocacy is needed, and measuring progress over time. Our research and education objectives will be re-oriented and organized in support of the achievement of these goals.

HERO's members, Board of Directors, and staff were all actively involved in providing guidance and substantive direction for HERO's long term strategic plan for 2016-2021. The following plan provides detailed input garnered during our HERO Think Tank sessions, from a HERO member survey, and during planning sessions with the Board and staff.

Our goals include influencing an increase in the use of individual-level assessments of corporate health and well-being program satisfaction, perceived organizational support, health equity, and well-being. In addition to influencing quality improvement in corporate health and well-being initiatives, our goals include advancing the business case for employers connecting with the health needs of their communities. Our major goals for the next five years are:

- 1) Fortify HERO's sustainability through smart growth strategies.
- 2) Increase collaborations and partnerships between HERO member organizations and with other organizations nationally and internationally who are also leading in the advancement of employee health.
- 3) Improve evidence informed best practices in the workplace that advance health and well-being worldwide.
- 4) Increase evaluation and research in individual level satisfaction with, and outcomes from, wellness programs.
- 5) Increase American workplaces' interest in, capacity for, and involvement with employee health and wellness programs along with their contributions to community health improvement.

## **Our HERO Planning Framework**

- 1) Resources and Preparation for Planning
- 2) HERO'S Vision, Purpose, and Values
- 3) SWOT: Strengths, Weaknesses, Opportunities, Threats
- 4) Context for the HERO Five Year Plan
- 5) "Do the Duh" Problem Statement
- 6) HERO's Planning Approach and Rationale
- 7) Goals & Objectives
- 8) Evaluation: HERO Operations Plans/Activities

### **1. Resources and Preparation for Planning**

HERO's Board of Directors, members, and staff were actively involved in providing guidance and substantive direction for HERO's long-term strategic plan for 2016-2021. In 2015, a complete [SWOT analysis](#) was conducted with members during a HERO Think Tank Session. HERO's Leadership Committee Chair, Jack Curtis, led this session, and the results were summarized and grouped by then HERO member volunteer, Paul Terry, for review with the HERO Board. Also in 2015, the Board embarked on a significant revision of HERO's vision statement. This was led by then Board Chair, LaVaughn Palma-Davis, and facilitated by Seth Serxner. The resulting new HERO vision is presented in the next section. Another strategic planning exercise with HERO members was conducted at our Think Tank in February 2016 in San Diego and these sessions and results were presented to the HERO Board and staff and described in the Hoshin Planning section below.

A preliminary set of long range goals were drafted by the HERO Team and presented at the July 18, 2016 HERO Board Meeting in Minneapolis, MN. These plans were put in the context of our staff's Internal Performance Scorecard our 2016 HERO Member [Survey Complete Data](#) Set, an Executive Summary of [Survey Results](#) and preliminary long range goals that HERO's staff prepared relating to [HERO Scorecard Trends and Domains](#).

Our July 2016 Research Think Tank was organized around the "Big How" of HERO's work in partnering with others to advance well-being for employees, families, and communities. Member discussions and recommendations were captured via a [Think Tank Proceedings](#) and detailed [Research Meeting notes](#).

## 2. HERO's Vision, Purpose, and Values

### **Our Vision:**

*All workplaces will positively influence the health and well-being of employees, families and communities.*

### **Our Purpose:**

Advancing health, well-being and performance through employer leadership.

### **Our Values:**

- Leadership: We advance our vision and purpose through collaboration and partnerships with thought leaders in workplace health and well-being and other organizations that have a stake in employee and community health.
- Excellence: We are committed to improving quality in health promotion nationwide by advancing professional best practices that are based on research and documented outcomes.
- Integrity: We adhere to strict ethical standards in how we conduct research and interact with HERO members and other organizational leaders and in the way we partner with other organizations.

## 3. SWOT: Strengths, Weaknesses, Opportunities, Threats

HERO's [SWOT analysis](#) offers considerable insight into how our members perceive HERO, along with where they consider the field of worksite health promotion has been and where it needs to go in the future. The attachments offer considerable detail from our member planning sessions. The following is high level SWOT feedback derived from the [detailed SWOT results](#) in each domain.

### Strengths:

1. Broadening the value proposition: HERO and our members are broadening the value proposition for our field by engaging a cross-section of stakeholders. We are providing research-based guidance on culture, engagement, and economic value through methods such as our shareholder value study.
2. Adding to the evidence base: We are credited with contributing reliable evidence that guides programs and services and communicates it effectively.
3. Purpose driven: HERO and our members are passionate and collaborative. We are influencing business strategy and are well-positioned to contribute to culture and well-being.

## Weaknesses and Threats:

1. Fragile sustainability and accountability: The focus on the individual, vs the role of environment, policy, culture and infrastructure; the foibles of return on investment (ROI) research, the preference for short-term benefits, and the inconsistent definitions held about the field of health promotion are concerns.
2. Weak communications and marketing for the field: With web streaming of media, un-monitored blogging, and the tendency of mainstream media to favor controversial stories over garden variety success stories, our field and HERO has been vulnerable to capricious attacks. Impactful communication about HERO's vision and goals has not consistently occurred.
3. Lack of consumer focus: A narrow focus on risk reduction, an aging model for change in a fast-moving tech era, and history of having a benefits and cost containment strategy rather than a talent, performance, and engagement strategy are concerns.
4. Other weaknesses specific to HERO relate to the continuity of our memberships and the tendency for only one member from an organization to be committed to the relationship. Too often, when that person leaves the membership is discontinued. Other HERO weaknesses are: a perception that members are not inclusive; an old boys club, confusion about what is open to non-members and limited resources for advancing the HERO brand and making membership more sticky.

## Opportunities:

1. Cross disciplinary collaboration: A strong interest in culture and environment as precursors to successful health improvement has been established in the field. Most recently, well-being has become a broader outcome of interest. Related to this, engaging with organizational development experts, behavioral economists, and community health agencies is of interest.
2. Measuring value on investment: Merging individual data such as that collected via an employee satisfaction survey or net promoter scores (NPS) with best practices metrics such as those collected via the HERO Scorecard could provide the substance needed for a broader value proposition.
3. Expanding the workplace health paradigm: Increasing sensitivity to generational differences and the nature of our changing workforce, adopting measures of well-being including assessments of meaning and purpose, high performance, and sustained engagement.
4. Advancing the case for connecting with communities: The employer's role in advancing employee, family, and community health is of interest to HERO members and is aligned with funding agencies such as the Robert Wood Johnson Foundation.

The HERO Board reviewed and discussed the following summary of strategies that were considered related to the 2015 results from the member SWOT analysis.

Summary of Strategies Related to SWOT	Strength	Weaknesses	Opportunity	Threats
<b>Reengineer the Value Proposition</b>	Value proposition. Purpose driven industry. Recognized as effective and imperative business strategy.	Focus on ROI can to set unrealistic expectations on medical outcomes. Communication and lack of clarity of scope and definition of workplace health & well-being.	VOI measurement. Change the way employer and employee gets care. Consistent terminology. Technology and data. Global competitiveness.	Security and confidentiality. Definitions. Lack of participatory and consumer oriented approaches. Effectively communicating the business case and integrating value into core business objectives. Difficulty of integration. Employers exiting the healthcare role.
<b>Advance Think Tank Research Agenda</b>	Evidence based. Purpose driven industry.	Weak public relations. Have not addressed the global market. Have not engaged small employers.	Research what leads to engagement in health and wellness and the contributions to resiliency, retention, performance, culture, cost, and overall personal, professional and organizational success.	Not knowing what works.
<b>Lead the Movement from Wellness to Well-Being</b>	Overall well-being and culture of health.	Value of health to the individual. Lack of sustainability of our efforts.	Address whole person. Redefine the target: well-being, engagement, performance. Collaboration. Break down silos.	Generational differences. Lack of foundational culture.
<b>Improve Industry Public Relations</b>	Mix of multi-stakeholder members. Passion of members.	Lack of accountability. Lack of collaboration between program	Packaging HERO research.	Criticism - internal and external/ Effectively communicating the business case and

		development and other key industries. Research not easy to translate for practitioners without research training.		integrating value into core business objectives / Difficulty of integration / Employers exiting the healthcare role/ Government and regulatory environment.
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### The 2016 July Research Think Tank Planning Implications for SWOT

Some of the themes from the 2015 SWOT were reiterated during the 2016 Research Meeting, particularly those relating to broadening partnerships and collaborations, and expanding the value proposition that the interest in well-being represents. Similarly, issues related to improving public relations, marketing, and more clearly articulating a value proposition were also continuing priorities. There were, however, additional opportunities and priorities evident given the Think Tank was organized around “how” HERO members can better collaborate. In particular, an interest in participatory research approaches where employer partners actively inform the research agenda were proffered. Connecting employers to communities continued as an opportunity theme, however, in 2016, the contribution of community collaboration in the context of employer’s role in sustainability was emergent. Member discussions and recommendations were captured via a [Think Tank Proceedings](#) and detailed [Research Meeting notes](#).

A summary of member outputs from research meeting table topic exercises included:

- Incorporate “voice of the consumer” into HERO initiatives. How do we measure at the individual level (NPS concept) as well as at the organization and population levels?
- Expand our footprint to influence organizations outside of our current membership, including other disciplines and geographic reach, particularly the west coast.
- Broaden work with communities.
- Continue to leverage the HERO Scorecard data to understand gaps, identify best practices, track trends, and educate on how to close gaps.
- HERO needs to distill research into language and terms that employers understand. Strengthen the employer point of view and design deliverables with employer use in mind. Translate deliverables into “plain English” and make available in many different formats.

### 5. Context for the HERO Five Year Plan

This year’s planning activities occur in the context of growth and changes at HERO and in the health promotion profession. They include:

- Mainstream worksite wellness: Surveys suggest wellness has become commonplace in America, though there is some abatement in the use of incentives tied to outcomes, and a

decline in sponsorship of screenings and health coaching. Building a “culture of health” and striving for “well-being” have been concepts associated with a maturation of wellness.

- Demographic changes: The millennial generation has now surpassed the Baby Boomers as America’s largest demographic and immigration trends will continue to influence a changing workforce. There is a marked increase in telecommuting and professional development offerings with employee engagement continuing as a watchword for human resources departments and c-suites.
- HERO growth and Board stability: HERO membership has experienced gradual and steady growth to 125 members over the past five years. The Board of Directors is comprised of top professional leaders, many of whom have been active in workplace health promotion for decades. Four veteran members will be leaving the Board in 2017.
- Accomplishments of the 2011-2015 business plan: Under the leadership of Jerry Noyce and a committed Board, the “Business Plan for 2011-2015” and the orientation toward building HERO’s Infrastructure and Operations have largely been accomplished.
- HERO staff is stable and leadership is growing. Paul Terry assumed the CEO role and Karen Moseley was promoted to Vice President of Education. Karen and Jessica Grossmeier, Vice President of Research, both increased their hours to full time status for HERO in 2016.

The Core Elements of the **HERO 2011-2015 Business Plan** are summarized in the table below. Each of the elements will be carried forward into this next five year 2016-2021 HERO plan as indicated in the HERO 2016 Internal Performance Scorecard summary below, and as detailed in the HERO Scorecard document at the end of this plan.

<b>Elements from 2011- 2015 Plan</b>	<b>Goals on 2016 HERO Performance Scorecard</b>
Grow Membership	Increase employer members 5%
Grow Research	Two research studies published per year, 8 peer-review journal submissions per year
Expand Educational Outreach	Increase HERO Forum attendance and webinar attendance
Develop Collaborations	Increase member committee engagement
Develop Industry Standards	Increase HERO Scorecard completions domestically and globally
Enhance Media Presence	Increase retweets and email blast effectiveness
Shape Public Policy on Health	Feature the HWHC results and website in conference presentations

*HERO will accomplish our goals through research, collaboration, education and dissemination.*

## **Hoshin Planning**

In addition to SWOT exercises, we conducted “[Hoshin Planning](#)” exercises with HERO members at our Think Tank session in San Diego in February 2016. As shown in the “dot voting” photo below, the vision elements considered most important to our members were posted; and those who put dots close to the outside of the circle next to the element considered that HERO was already strong in that area. Those who put their dots close to the inside of the circle considered us to be weak in that area of interest. Overall results indicate HERO members consider our work in collaborative research, thought leadership, and demonstrating the value proposition for our field to be strong. In contrast, while connecting employers and workplaces to help address community health needs is held as a value by HERO members, our capacity to be involved with communities and have an impact on community health are deemed to be relatively weak.



HERO Members Voting on Hoshin Planning Elements

We asked the participating visioning groups to draw arrows from those vision elements they considered to be causing or influencing other elements to happen. In the Hoshin planning convention, arrows that go out from one element to another are considered “drivers” of the vision. When a vision element has many incoming arrows, these are considered the “outcomes” of interest in the vision. The table below shows the results of this exercise. Our research and collaboration are considered strong drivers of our vision and our work in demonstrating value in the field are an important outcome of interest.



## Vision Exercise with HERO Members (San Diego Think Tank 2016)

<b>Drivers</b>	<i>HERO Status</i>	<b>Outcomes</b>	<i>HERO Status</i>
Research	strong	Demonstrate Value Proposition	strong
Collaboration	strong	Thought Leadership	strong
Data Management	moderate	Policy Influence	weak
Community Involvement	weak	Community Impact	weak
		Innovation	weak

### 6. “Do the Duh” Problem Statement

HERO Board Chair, Ron Goetzel, once explained his profession to his nephew Rafi. After hearing about how Ron’s work related to helping people quit smoking or sustain a healthy weight, Rafi exclaimed: “Duh! Everybody knows that already.” The problem, of course, is that few act on what they know. In fact, less than two percent of our population currently practice the American Heart Association’s “Simple Seven” health practices. Accordingly, our challenge remains one of changing our culture, environments and organizational practices in such a way that healthier individual choices are encouraged and supported. Or, as Ron says, get more people to “do the duh.” Challenges that have been named in the planning attachments referenced here include:

- Impact of national health policies and programs such as the Affordable Care Act.
- Unintended consequences of incentive models that have “muddled carrots and sticks”
- The need to translate HERO and other research to be more accessible for business leaders
- A perception that HERO is parochial and something of an old boys’ network
- The voice of the consumer has been underrepresented
- A lack of strong marketing and public relations acumen in the health promotion field

### 7. HERO’s Planning Approach and Rationale

HERO members and our Board’s leaders are passionate about health and well-being and share a desire to give back to the health promotion profession. Visioning exercises with HERO Board members reveal a strong interest in advancing the application of science to practice and a yearning to solidify the business case for investing in health and well-being once and for all. As a sampling of Board member vision statements shows, the dream is big but the ideas are doable.

- “HERO proves wellness is worth it.”
- “We knew what works so HERO put it into practice.”
- “HERO shows the Fountain of Youth has been here all along.”
- “The community is your workplace. HERO connects business to their community’s needs.”
- “HERO moves organizations to ‘do the duh.’”

- “Health and well-being engagement reaches 100% and employees say: ‘I’ll pay for that.’”
- “HERO is that beacon for understanding. Wellness is no longer caught up in buzz words.”
- “A culture of health is advanced by HERO. Leaders are trained in organizational development.”

## **HERO Member Survey Results**

HERO’s planning approach has also been informed by member input during Think Tank gatherings and recently through a survey. In the first quarter of 2016, we developed a HERO member questionnaire to assess satisfaction with membership and gather information about the value we provide to members and their organizations (see attachment ‘Exec. Summary’). Our findings include:

- The top three areas of greatest value to members are networking with others, staying current in the profession, and learning about HERO research and having the chance to exert leadership within the profession.
- The top reasons for joining HERO were networking and getting access to HERO resources.
- The most important point of value for members are in-person events such as Think Tank meetings, the Research meeting, and informing public policy.
- They frame the problem as too much of a bad condition/behavior or not enough of a good condition/behavior.
- The top engagement opportunities that members appreciate are webinars, HERO communications, the Resource Center, and participation in study committees.

## **8. Goals & Objectives**

The “2011-2015 Business Plan” and the subsequent successes in building a solid organizational infrastructure has laid the foundation for HERO to continue growing as an organization. The work of the past five years also enables new stretch goals that relate to growing the effectiveness, credibility, and health impact of the profession. To that end, this “HERO 2016-2021 Strategic Plan” adds goals intended to influence nationwide trends in the use of evidence informed best practices in health promotion. The HERO Scorecard has been considered by staff and Board members alike as a key vehicle for advancing best practice concepts, identifying where more education and advocacy are needed, and measuring progress over time. Our research and education objectives will be re-oriented and organized in support of the achievement of these goals.

Where the HERO Scorecard is a self-administered, organizational level assessment tool, showing progress in health and well-being in companies and communities will also benefit from individual-level assessments, especially if put in the context of organizational practices. Accordingly, our goals include influencing an increase in the use of individual level assessments of corporate health and well-being program satisfaction, perceived organizational support, health

equity, and well-being. In addition to influencing corporate health and well-being initiatives, our goals include advancing the business case for employers connecting with the health needs of their communities.

*HERO will accomplish our goals through research, collaboration, education and dissemination.*

**HERO Goals and Objectives for the next five years are:**

1. Fortify HERO's sustainability through smart growth strategies.
  - i. Increase the ratio of employer to provider members to be at or above an employer majority.
  - ii) By2018, revise as needed and repeat the HERO member satisfaction survey.
  - iii) Increase investments in HERO's brand and improve the stickiness of membership.
2. Increase collaborations and partnerships between HERO member organizations and with other organizations nationally and internationally who are also leading in the advancement of employee health.
  - i. Recruit new, non-HERO member organizations to contribute to Think Tanks, Forum, and webinars.
  - ii. Recruit preferred providers globally to advance HERO's International Scorecard.
  - iii. Pursue grant funding that advances awareness about the employer's role in community health.
3. Improve evidence informed best practices in the workplace that advance health and well-being worldwide.
  - i. By 2021, the total users of the HERO Scorecard will increase by 100% over the June 30, 2016.
  - ii. By 2021, the number of cohorts represented in the HERO database, that is, time over time users, will increase by 25% over the June 30, 2016 number.
  - iii. Increase the number of sessions dedicated to evidence informed best practices at HERO educational venues, through HERO research projects, and via dissemination of HERO research findings.
  - iv. By 2021, the use of evidence informed best practices, as measured by the average scores of organizations completing the HERO Scorecard through June 30, 2016, will improve by 25%.
    - a. Increased strategic planning by 50%
    - b. Increased participation in health assessments, screenings and health coaching.
    - c. Increased measurement and evaluation by 50%
    - d. Increased family offerings by 20%
    - e. Increased organizational and cultural support by 40%
4. Increase evaluation and research in individual level satisfaction with, and outcomes from, wellness programs.
  - i. Strengthen individual level data collection tools in the revision of the PHA-HERO Measurement and Evaluation Guide.

- ii. Increase the number of sessions dedicated to the importance of individual level satisfaction metrics at HERO educational venues and through HERO research.
  - iii. By 2020, the HERO Scorecard and/or other scorecards will be used in connection with individual-level data collection such as Net Promoter Scores, the AHA person-level assessments, or the NIOSH well-being assessment form.
  - iv. By a jointly determined date, the HERO Scorecard will include new measures in engagement, well-being and culture of health. These could be developed, adapted, or adopted measures.
5. Increase American workplaces' interest in, capacity for, and involvement with employee health and wellness programs along with their contributions to community health improvement.
- i. By a jointly determined date, the HERO Scorecard will include new measures in engagement, well-being, a culture of health and community connectivity. These could be developed, adapted, or adopted measures
  - ii. Increase marketing and public relations initiatives that communicate the business case for, and proven effectiveness of workplace health and well-being initiatives.
  - iii. By a mutually determined date, the HERO Scorecard will include measures, survey methods and implementation strategies that positively influence workplace responsiveness to health inequities, health disparities and social determinants of health.

## 9. Evaluation: HERO Operations Plans/Activities

Strategic plans need to be responsive to changes in the organization, the business climate, and the needs and interests of members we serve. Accordingly, the goals and objectives named in this long range plan will be subject to regular reviews and specific metrics that will be monitored via HERO's internal performance scorecard. This scorecard is also reviewed periodically by HERO's Board of Directors. The goals and objectives above are reflected in the following matrix that shows tasks and activities along with timelines and accountabilities for each objective.

2016 HERO Performance Scorecard				
2016 Annual Objectives	Activities	Timeline	Accountability	Measures
Increase number of HERO <i>Employer</i> Members	Engagement and membership committee	Annual review	Paul and Board and HERO team	Ratio of employer/provider
Positive operating fund balance	Budget management	Finance committee qtrly review	Paul and Board of Directors	% goal annually

Research and professional journal publications	Education and Research committee leaders charters	Annual targets	Jessica and Paul and Research Committee	# Peer review submissions and # publications annually
Three year strategic plan and quality improvement priorities	Gather inputs from members, staff and board	New Plan in 2016. Review annually	Paul and Board Executive Committee	Plan drafted and converted to performance metrics.
Forum quality and attendance	Kaizen events, faculty recruitment, promotions	Annual conference	Karen and Education Committee	Paid attendance and conference reviews
<b>5 Year Breakthrough Objectives</b>				
Sustain research articles submitted to peer-reviewed journals per year	Initiate, partner and manage research projects	Annual research agenda	Jessica, Paul and Research Committee	Submitted articles
Strategic grant applications of interest to employers	Initiate partner and manage grants	Annual grants agenda	Paul, Karen, Jessica and Healthy Workplaces Committee	Submitted grants
<b>2016 Targets to Improve</b>				
Kaizen quality improvement Events	Events in data, conference and communications	Annual Kaizen agenda	Paul and HERO staff	Improvements documentation
Average number of participants in webinars	Host HERO webinars and partner with AJHP	Quarterly webinar schedule	Paul and HERO staff	Internal scorecard monitoring
Execute at least one HRP funded project per year	Create proposals, recruit data suppliers, recruit research partners	HERO Annual Report	Jessica and Paul and Research Committee	Internal scorecard monitoring
Increase the number of times members are featured on Twitter	Mention members in Tweets	Daily	Marlene and Emma and team	Internal scorecard monitoring
Increase unique HERO Scorecard completions nationally	Promote HERO Scorecard in conference presentations and in industry trade journals	Quarterly Internal Scorecard	Jessica and Paul and Mercer partnership	Internal scorecard monitoring
Increase unique HERO Scorecard completions globally	Leverage Mercer partnership to increase global awareness. Promote HERO	Quarterly Internal Scorecard	Jessica and Paul and Mercer partnership	Internal scorecard monitoring

	Scorecard in conference presentations and in industry trade journals			
Increase total financial contributions from sponsors	Direct recruitment, member referral process.	Monthly tracking spreadsheet	Pat and Paul	Sponsor progress plan and documentation.
Increase Twitter engagement (clicks, retweets, mentions, likes, quotes, replies of HERO)	Post engaging items	Daily	Marlene and Emma	Internal scorecard monitoring
Increase member committee engagement (by company)	Planned events, planning meetings, convening chairs	Monthly tracking spreadsheet.	Karen and HERO Team and Committee Chairs	Internal scorecard monitoring
Measure publication reach articles and bylines	Invited experts, webinar and conference follow ups.	Web based monitoring	Committee Chairs and PR consultant(s)	Requested data feeds from consultant(s)
Number of new members	Send out new member packet	Connect at time of application, follow up later with social media templates and quarterly if possible.	Paul and Marlene and HERO Board	Internal scorecard monitoring
Number of dropped members	Reach out to non-renewed members.	Connect with member at time of notice and 6 months later as a follow up	Paul and Marlene and HERO Board	Internal scorecard monitoring
Impact scores of peer-reviewed published studies (average from peer-reviewed journals)	Pursue publication in higher-impact journals	Quarterly Internal Scorecard	Jessica and Paul and Research Committee	Internal scorecard monitoring
Increase email blast effectiveness (opens, click-through)	Communications improvements / Make the click-through more noticeable plus do not saturate the blast with too many links	This should be an ongoing process with all email blasts	Marlene and Emma and team	Internal scorecard monitoring

Maintain low unsubscribes from mailers	Communications improvements	Monitor after each mailing	Marlene and Emma and team	Internal scorecard monitoring
Number of publication downloads	Marketing and Public relations investments	Documenting downloads	Marlene and Emma and team	Internal scorecard monitoring

Reference: Portions of this planning format were taken from “Prevention by Design: Strategic Planning [Tip Sheet](#)” 5/17/06. (accessed 8.2.16)