**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](http://hero-health.org/wp-content/uploads/2016/08/A-attachment-SWOT-Analysis-to-Board-1.pptx) 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 July18, 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](http://hero-health.org/wp-content/uploads/2016/08/HERO-Member-Survey.pdf) Set, an Executive Summary of [Survey Results](http://hero-health.org/wp-content/uploads/2016/08/E-Member-Survey_-summary.docx) and preliminary long range goals that HERO’s staff prepared relating to [HERO Scorecard Trends and Domains.](http://hero-health.org/wp-content/uploads/2016/08/F-HERO-Board-Goals-Review-Scorecard-data.pptx)

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](http://hero-health.org/2016/07/hero-research-think-tank-proceedings/) and detailed [Research Meeting notes.](http://hero-health.org/wp-content/uploads/2016/08/G-Research-TT-Discussion-Summary-7.16.docx)

1. **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.

1. **SWOT: Strengths, Weaknesses, Opportunities, Threats**

HERO’s [SWOT analysis](http://hero-health.org/wp-content/uploads/2016/08/A-attachment-SWOT-Analysis-to-Board-1.pptx) 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](http://hero-health.org/wp-content/uploads/2016/08/B-HERO-SWOT-Analysis.xlsx) 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.

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| **Summary of** |  |  |  |  |
| **Strategies** | **Strength** | **Weaknesses** | **Opportunity** | **Threats** |
| **Related to** |
|  |  |  |  |
| **SWOT** |  |  |  |  |
| **Reengineer the**  **Value**  **Proposition** | 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. |
| **Advance Think**  **Tank Research**  **Agenda** | 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. |
| **Lead the**  **Movement from**  **Wellness to Well-**  **Being** | 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. |
| **Improve**  **Industry Public**  **Relations** | 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 |

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|  |  | 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](http://hero-health.org/2016/07/hero-research-think-tank-proceedings/) and detailed [Research Meeting](http://hero-health.org/wp-content/uploads/2016/08/G-Research-TT-Discussion-Summary-7.16.docx) [notes.](http://hero-health.org/wp-content/uploads/2016/08/G-Research-TT-Discussion-Summary-7.16.docx)

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.

1. **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.

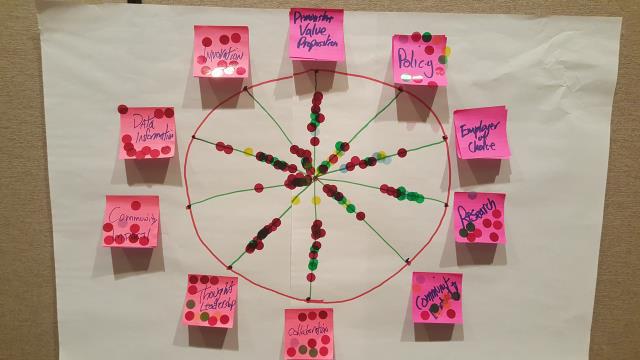
The Core Elements of the **HERO 2011-2015 Business Plan** are summarized in the table below. Each of the elements will be carried forward into this next five year 2016-2021 HERO plan as indicated in the HERO 2016 Internal Performance Scorecard summary below, and as detailed in the HERO Scorecard document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

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| **Elements from 2011- 2015**  **Plan** | **Goals on 2016 HERO**  **Performance Scorecard** |
| 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](http://www.qualitydigest.com/magazine/1997/may/article/strategic-planning-hoshin-process.html)” 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 consider “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)

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| **Drivers** | **HERO Status** | **Outcomes** | **HERO Status** |
| Research | strong | Demonstrate Value | strong |
|  |  | Proposition |  |
| Collaboration | strong | Thought Leadership | strong |
| Data Management | moderate | Policy Influence | weak |
| Community | weak | Community Impact | weak |
| Involvement |  |  |  |
|  |  | Innovation | weak |

1. **“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

1. **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.

1. **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.
   1. Increase the ratio of employer to provider members to be at or above an employer majority.
   2. By2018, revise as needed and repeat the HERO member satisfaction survey.
   3. 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.
   * 1. Recruit new, non-HERO member organizations to contribute to Think Tanks, Forum, and webinars.
     2. Recruit preferred providers globally to advance HERO’s International

Scorecard.

* + 1. Pursue grant funding that advances awareness about the employer’s role in community health.

1. Improve evidence informed best practices in the workplace that advance health and well-being worldwide.
   * 1. By 2021, the total users of the HERO Scorecard will increase by 100% over the June 30, 2016.
     2. 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.
     3. 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.
     4. 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%.
        1. Increased strategic planning by 50%
        2. Increased participation in health assessments, screenings and health coaching.
        3. Increased measurement and evaluation by 50%
        4. Increased family offerings by 20%
        5. Increased organizational and cultural support by 40%
2. Increase evaluation and research in individual level satisfaction with, and outcomes from, wellness programs.
   * 1. Strengthen individual level data collection tools in the revision of the PHA-HERO Measurement and Evaluation Guide.

* + 1. Increase the number of sessions dedicated to the importance of individual level satisfaction metrics at HERO educational venues and through HERO research.
    2. 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.
    3. 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.
  1. Increase American workplaces’ interest in, capacity for, and involvement with employee health and wellness programs along with their contributions to community health improvement.
     1. 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
     2. Increase marketing and public relations initiatives that communicate the business case for, and proven effectiveness of workplace health and well-being initiatives.
     3. 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.

1. **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.

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| **2016 HERO Performance Scorecard** | | | | | | |
| **2016 Annual Objectives** | **Activities** | | **Timeline** | **Accountability** | | **Measures** |
| Increase number of HERO  *Employer* Members |  | Engagement and  membership  committee | Annual  review | Paul and  Board and  HERO team | | Ratio of  employer/provider |
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| Positive operating fund balance | Budget  management | | Finance  committee  qtrly review |  | Paul and  Board of  Directors | % Goal annually |
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| 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 |
| **5 Year Breakthrough Objectives** | | | | | |
| 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 |
| **2016 Targets to Improve** | | | | | |
| 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 |
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| 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 |
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|  | Scorecard in  conference  presentations  and in industry  trade journals |  |  |  |
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| 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 |

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| --- | --- | --- | --- | --- |
| 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](https://www.google.com/webhp?sourceid=chrome-instant&ion=1&espv=2&ie=UTF-8)” 5/17/06. (accessed 8.2.16)