

At A Glance: The six steps for planning a health promotion program

STEP 1: MANAGE THE PLANNING PROCESS

Purpose: to develop a plan to manage stakeholder participation, timelines, resources, and determine methods for data-gathering, interpretation, and decision making.

Plan to engage stakeholders, including clients and staff, in a meaningful way. Establish a clear timeline for creating a work plan. Plan how you will allocate financial, material, and human resources. Consider the data required to make decisions at each step and include adequate time for data collection and interpretation. Establish a clear decision-making process. (e.g., by consensus, by committee)

STEP 2: CONDUCT A SITUATIONAL ASSESSMENT

Purpose: to learn more about the population of interest, trends, and issues that may affect implementation, including the wants, needs, and assets of the community.

This step involves identifying: what is the situation; what is making the situation better and what is making it worse; and what possible actions you can take to address the situation. Use diverse types of data (e.g. community health status indicators, stories/testimonials; evaluation findings; “best practice” guidelines), sources of data (e.g. polling companies; community/partner organizations; researchers; governments; private sector); and data collection methods (e.g. stakeholder interviews or focus groups; surveys; literature reviews; review of past evaluation findings or stakeholder mandates/policies).

STEP 3: IDENTIFY GOALS, POPULATIONS OF INTEREST, OUTCOMES AND OUTCOME OBJECTIVES

Purpose: to use situational assessment results to determine goals, populations of interest, outcomes and outcome objectives.

Ensure program goals, populations of interest and outcome objectives are aligned with strategic directions of your organization or group:

- goal: a broad statement providing overall direction for a program over a long period of time.
- population(s) of interest : group or groups that require special attention to achieve your goal
- outcome objective: brief statement specifying the desired change caused by the program

STEP 4: IDENTIFY STRATEGIES, ACTIVITIES, OUTPUTS, PROCESS OBJECTIVES AND RESOURCES

Purpose: to use the results of the situational assessment to select strategies and activities, feasible with available resources, that will contribute to your goals and outcome objectives.

Brainstorm strategies (e.g. health education, health communication, organizational change, policy development) for achieving objectives using one or more health promotion frameworks such as the Ottawa Charter for Health Promotion or the socioecological model. Prioritize ideas by applying situational assessment results. Identify specific activities for each strategy, including which existing activities to start, stop, and continue. Select outputs and develop process objectives. Consider available financial, human and in-kind resources.

STEP 5: DEVELOP INDICATORS

Purpose: to develop a list of variables that can be tracked to assess the extent to which outcome and process objectives have been met.

For each outcome and process objective consider the intended result and whether: the intended result can be divided into separate components; the intended result can be measured; there is appropriate time for observing a result; required data sources are accessible; and the resources needed to assess the result are available. Define indicators to measure each outcome and process objective and perform a quality check on proposed indicators ensuring they are valid, reliable, and accessible. Indicators are used to determine the extent to which outcomes and process objectives were met.

STEP 6: REVIEW THE PROGRAM PLAN

Purpose: to clarify the contribution of each component of the plan to its objectives, identify gaps, ensure adequate resources, and ensure consistency with the situational assessment findings.

A logic model is a graphic depiction of the relationship between all parts of a program (i.e., goals, objectives, populations, strategies, and activities) and is one way in which a program overview can be communicated. Review the plan to determine whether: strategies effectively contribute to goals and objectives; short-term objectives contribute to long-term objectives; the best activities were chosen to advance the strategy; activities are appropriate to the audiences; and the resources are adequate to implement the activities.

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At a Glance

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