

'OHANA WORKPLACE ALLIANCE

Framework Overview - Implementation Sequence

The recommended order for using every 'Ohana Workplace Alliance template — from first orientation to ongoing measurement

Every template in the 'Ohana Workplace Alliance toolkit is designed to feed the next. This document lays out the architecture of that sequence: eight stages, each with a clear purpose and output, so an organization moving through the full process always knows what to use next — and why.

Each individual template also ends with a “Next Step” pointer to the template that follows it — so following those pointers in order will walk you through this same sequence naturally.

At a Glance

#	Stage	Template(s)	Produces
1	Orient	Quick-Start Checklist or Full Walkthrough Quick-Start Companion	A map of the whole process
2	Align	Strategy Alignment Overview	Top 2–4 priority focus areas
3	Assess	Organizational Needs & Resource Capacity	Validated needs + resource picture
4	Plan	Action Plan Checklist + SMART Goals Checklist (Refer to: 1-3 Action Plan & Implementation Guide)	Concrete goals, owners, timeline
5	Select	Resource Tool Kit (Templates 1–7)	Chosen practices
6	Formalize	Developing Standards	Written, reviewed policy
7	Launch	Manager Talking Points + Launch Announcement (Refer to: 1-3 Action Plan & Implementation Guide)	Org-wide rollout
8	Sustain	Stay/Exit Interviews + annual review (Refer to: 1-3 Action Plan & Implementation Guide , 5-a ResourceToolKit Templates Stay Interview and 5-b ResourceToolKit Templates Exit Interview)	Ongoing measurement & refresh

STEP 1 Orient Yourself

Before opening any workbook, get the shape of the whole process. Use the Full Walkthrough for a plain-language explanation of every stage, or the Quick-Start Checklist for a fast, scannable version. Either works as your map for everything that follows — pick whichever matches how you like to work.

STEP 2 Strategy Alignment Overview

Review your mission, vision, values, and strategic plan; confirm your “people strategy” supports it; check your organizational readiness; and map the stakeholders who need to be involved. This stage answers why an 'ohana-friendly program matters to your organization specifically — and produces your top 2–4 priority focus areas, the input every later stage builds on.

STEP 3 Organizational Needs & Resource Capacity

Scan your external environment and internal workforce trends, inventory the practices you already offer, and — critically — gather real data on what employees need rather than relying on assumptions. Then assess what budget, staff time, and systems you actually have. This stage turns your priority focus areas from Step 2 into a validated, resourced picture of what's realistic.

STEP 4 SMART Goals + Action Plan Checklist

Convert your validated priorities into specific, measurable goals — Specific, Measurable, Achievable, Relevant, Time-bound — then break each goal into tasks, priorities, deadlines, and resource owners using the Action Plan Checklist. This is the stage where strategy becomes an executable plan.

STEP 5 Resource Tool Kit (Templates 1–7)

With goals and a timeline in place, select the specific practices to implement from the seven practice categories — Flexible Work & Time Off, Dependent Care, Support Programs, Health, Welfare & Insurance Benefits, Financial Benefits & Assistance, Education & Career Development, and Emerging & Community-Submitted Practices. Choose practices that match the goals set in Step 4, not the other way around. Use the Recommended Sequence for a suggested order, or the Practice Finder to jump straight to a specific employee need.

STEP 6 Developing Standards

Write the formal guidelines for each selected practice: purpose, eligibility, and process. Route the draft through HR and legal review to confirm compliance with applicable Hawai'i and federal law before anything is published.

STEP 7 Manager Talking Points + Launch Announcement

Brief managers first, using the Manager Talking Points template, so they can field questions confidently — managers are the primary interpreters of any new policy for their teams. Send the organization-wide announcement 1–2 business days later, using the Launch Announcement Template's email, chat, and handbook versions.

STEP 8 Stay/Exit Interviews + Annual Review

Once the program is live, track utilization and satisfaction, and use the Stay Interview and Exit Interview templates to gather ongoing, honest feedback. Revisit the Strategy Alignment Overview and Organizational Needs & Resource Capacity workbooks at least once a year, or whenever organizational priorities shift, to keep the program current.

How the Templates Reference Each Other

The sequence above isn't just a suggested order — it's built into the templates themselves. Each workbook's closing “Next Step” section names the template that follows it, and the Strategy Alignment Overview's Communication phase links directly to the Manager Talking Points and Launch Announcement templates. The Action Plan & Implementation Guide sits alongside this entire sequence as a detailed reference — timelines, worked examples, and a full resource map — rather than being a stage of its own, so it's worth linking prominently wherever an organization first arrives at the Getting Started page.