

2010-2011 Strategic Plan -

The Vision: To be the pioneer of wellness innovation for the employers we serve

Your Mission: Inspiring the successful integration of wellness best practices in the workplace through access to quality resources and forums

Initiative	Goals	Objective	Tasks	Subtasks*	Champion	Progress
Develop a viable administrative structure and financial base	Creation of a Coalition structure and program format	Determine Organizational Structure by June 15	Consult legal experts to determine appropriate structure of Coalition	Considerations: Approach Miller Canfield, NEW, Rehmann; liability issues, insurance needs, feasibility of dues, administrative support	Michelle and Kent	
			Create governance structure	Considerations Bi-laws or charter, oversight, committee(s) structure, calendar, coalition meetings formats, etc?	Scott, Tom	Task pending completion coalition structure task.
			Define membership: individual, corporate, sponsor.	Membership criteria for participation in Coalition meetings as presenter, sponsor, etc		
		Determine Financial Structure by June 15, 2010	Draft a Coalition operating budget	Considerations Determine outside budgeting consultant, identify outside firm to conduct audits and other	Michelle (Jodi) tentative	
			Identify funding sources (short and long-term)	Considerations Define sponsorships, investors, grants, related guidelines, dues structure	Kent and Jamie	
			Determine signatory(s), etc.		Michele	
		Determine Technology Needs - Gap Analysis by Sept 1, 2010	Determine current Coalition technology resources and their status		Scott	Task pending completion coalition structure task.
			Determine technology needs for 2012			
			Conduct gap analysis and identify options for meeting future state needs.			

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		Align Marketing Strategy with current Vision and Mission by Sept 1, 2010	Develop marketing plan and promote alignment of Coalition branding materials with Vision and Mission		CONSIDER* HEIDI AND HOPE	SUSAN WILL APPROACH THEM,
			Develop communication standards	Considerations Who is in charge of which communications, types of branding on communiqués, info to be communicated	Scott	Task pending completion coalition structure task.
			Develop a media plan	Considerations Develop relationship with key media to promote and communicate the Coalition initiatives Promote messaging of the Coalition events/ideas within other businesses Maintain the Coalition newsletter	CONSIDER* HEIDI AND HOPE	SUSAN WILL APPROACH THEM,
		Define guidelines for the Coalition meetings' program content and quality of content by December 1, 2010	Establish criteria and protocols for use as presentation guidelines at Coalition meetings.		Susan Scott as support	
			Establish guidelines for networking and solicitation of members and for self promotion at Coalition meetings			

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Increase engagement level and membership of corporations and organizations that are contemplating, implementing or maintaining wellness initiatives.	Maintain annual retention of existing membership at 95%.	Establish engagement baseline data for organizational and individual participation by March 1, 2010	Baseline data-Measure and report : 1 number of people in data base 2 meeting attendance per month 3 website hits/click throughs		Scott	Complete.	
		Present report to Executive Committee on key tactics for increasing Coalition participation by Oct 1, 2010	Research other appropriate organizations with like interests to identify key programs and initiatives for membership.		Michele		
	Increase net number of new Coalition members by 10% annually.	10% expansion membership of key individuals or organizations in 2010 compared with 2009	Utilize and evaluate existing metrics to identify tactics for successful recruitment and retention of membership	Develop and implement recruitment and retention plan Develop annual networking venue and protocols for event Continuing engaging Oakland Chamber Network in outreach efforts	Considerations: Baseline metrics, survey results	Laurie Gustafson & Erin Zeckzer	Laurie Gustafson & Erin Zeckzer have agreed to be co-champions
	Provide access to innovative resources, opportunities and best practices.	Provide a bi-monthly meetings forum where innovative resources, opportunities and best practices are shared and discussed	Maintain high-quality formats emphasizing evidence-based content for all 2010-2011 Coalition events and endeavors	Considerations Develop criteria for speakers presenting, and for sponsors hosting at Coalition meetings. Present criteria to Executive Committee	Susan, Jamie		

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		Create engagement with businesses & other organizations in ongoing Coalition initiatives	Promote messaging of wellness programs in business venues		CONSIDER MITSY and SUSAN EMERY	Susan Emery has agreed to work on this objective. Mitsy is no longer able to be a champion. Until the Exec. Committee provides further direction Susan plans to be a greeter at the Full meetings
		Establish 2011 calendar of special events by October 15, 2010.	Present Executive Committee with proposed calendar of special events at October meeting		Susan	

*Considerations: These are suggested items to be considered by the task champion who will be responsible for delineating the subtasks needed to complete the related tasks and fulfill the objective

*CONSIDER: Champions have been nominated and these individuals have yet to give their approval of undertaking the championship.