

## Global Wellness Institute (GWI) Initiative Best Practices & Guidelines

### I. What is a GWI Initiative?

The GWI's mission is to “Empower Wellness Worldwide” through its four pillars: research, initiatives, roundtables and [wellnessevidence.com](http://wellnessevidence.com). By supporting a variety of industry initiatives, we are furthering the international conversation about wellness in its diverse forms. An initiative chair, who is a renowned thought leader in his or her particular area of focus, leads each GWI initiative.

### II. How do we choose which Initiatives to Launch?

Initiatives are borne of passion and commitment. They come to life because someone expressed a strong desire to lead an effort to educate people about a topic of importance. They reflect industry trends and issues of global importance to the wellness community. Occasionally, our team will identify an important trend and reach out to a renowned thought leader to take part. In the end, passion is the fuel that drives these initiatives.

### III. How to Begin an Initiative: Communication Guidelines & Best Practices

- Anyone interested in starting an initiative should reach out to Beatrice Hochegger at [Beatrice.hochegger@globalwellnessinstitute.org](mailto:Beatrice.hochegger@globalwellnessinstitute.org) to set up an initial call with the GWI team.
- If you are nominating yourself to chair an initiative, please be prepared to submit a short description and why you feel it would contribute to the GWI mission. It would also be helpful to identify a few (at least three) people you would like to be part of your initiative. Please remember that global representation is important.
- The initiative name will be decided at the beginning, so please be prepared to suggest one that will then be discussed and decided in concert with the GWI team. It is important to be consistent with other existing initiatives. We find straightforward names work best: Hot Springs Initiative, Consulting Best Practices, Mental Wellness, etc.
- We would like the chair to decide on a vice-chair, who will support them and fill in if they're unavailable for a scheduled call. This helps to keep the projects flowing, as schedules understandably have an impact. Consistency of communication and collaboration is key to the success of an initiative.
- We encourage global representation on the initiative rather than a concentration of members from a single country. We find having around six to 10 members tends to work well and is a manageable size.
- Initiative chairs should make it clear that, if somebody joins their initiative, they are visible on our website for one year through the annual Global Wellness Summit. After the Summit, the chair and the GWI team will review the initiative and its members to ensure it still aligns with the goals of the GWI and remains relevant to the industry.
- Initiative chairs are asked to submit bios and photos of themselves and each member, an introductory video (click [here](#) to learn more) and a written statement regarding goals/objectives. All of these will be used to create the initiative's page on the website.
- We encourage initiative chairs to use the GWI logo as part of their email signature. This not only helps spread the word about the GWI and its important work, but current chairs feel it carries cache globally. It's good for everyone.



- We suggest initiative chairs hold monthly meetings with their members. Below are some best practices:
  - Establish a call on the same day at the same time every month. (For example, the first Thursday of every month at 10:00 am EST). This can be tricky at first, as members tend to be in different time zones. Once established, it's important to consistently have the call and this is where a vice-chair can be helpful.
  - Set up your own Zoom account to use for calls (we recommend a Pro account for \$14.99/month – link to sign up: <https://zoom.us/pricing>). This allows for video conferencing, which is ideal, but also allows people to call in from anywhere in the world.
  - Send out a reminder a week or so before the call and confirm the Zoom specifics.
  - Send out a reminder the day before with an agenda. We find it's critical to the ongoing work of an initiative to have an agenda to follow, as it helps ensure that objectives are met.
  - Record your calls so people who are unable to join the call can listen to it afterwards – this can easily be done [via Zoom](#).
  - Ask someone to take notes during the call. Once the call is finished, have the person update their notes and send them to all of the initiative members along with a link to the recording.
  - Make sure to establish a meg culture where all participants “[mute](#)” themselves at the beginning in order to avoid background noise. They then unmute when speaking.
  - The GWI provides a free Dropbox folder to each initiative and its members, which should be used for saving meeting recordings, agendas, meeting notes, working materials, etc.

#### IV. Support from the GWI Team

- Each initiative is given an online presence on the [GWI website](#) including their own initiative page.
- There is an opportunity to:
  - Be part of the biweekly Brief that goes out to the database.
  - Be included in press releases.
  - Send out email communications to the GWI database relevant to your sector.
  - Suggest ways to bring the initiative to life at the following Global Wellness Summit. That might include suggesting a key speaker, presenter, breakout session, lunch topic discussion, etc.
  - Produce a valuable deliverable (e.g. a manual, directory, industry list, white paper, infographic, etc.) for the industry and have it listed on the [Initiative Projects page](#).
- Use the GWI Dropbox folder to save any relevant agendas, meeting notes, recordings and initiative materials.
- The GWI hosts quarterly initiative chair calls to exchange ideas, best practices, and discuss questions and relevant topics. These calls are recorded; however, we ask any chairs that won't be able to participate to select a representative from their committee to join the call.
- The GWI can provide collateral for presentations and networking events (e.g. GWI “At a Glance” brochures, copies of research reports, etc.). Please let the team know two to four weeks in advance so we can order and ship ahead of time.
- We consider initiative chairs “VIPs”, and as such, they will receive the Monthly Wellness Barometer that's curated by Thierry Malleret, advance notice of press releases, and special invitations to GWI events.

## V. Evolving as an Initiative: Special Projects & Involvement

- Once or twice a year, we ask each initiative to create a white paper/report/briefing that we can share with our database so that our constituents will be informed about what is being accomplished.
- Several months before the annual Summit, each initiative chair is asked to submit their vision for a presentation at the Summit. Then the co-chairs of that year's Summit, Susie and Nancy, will evaluate how/if it will fit within the framework of the program. The goal is to give visibility to the initiative and advance each initiative's mission, as well as the overall mission of the GWI.
- We ask that you mention your involvement with GWI when you speak at industry or press events. This is an important way for us to expand our reach, which helps us all.

## VI. Re-Evaluation & Ending of an Initiative

- Each year after the Global Wellness Summit, the GWI team will re-evaluate all existing initiatives. The outcome could be: a) moving forward with the initiative as is, b) merging with another initiative, c) ending the initiative, or d) changing the initiative chair. The process we have set up enables the initiatives to be fluid – they should evolve, be nimble and change over time – and at the appropriate time, come to a close.
- If a new person is going to take over a current initiative, they would decide on their vice-chair and build the group of members, which can include retaining some or all of the current members. At the end of each year, we recommend that initiative chairs re-evaluate their members and make changes, additions and updates for a successful upcoming year.

## VII. Communication with the GWI Team & Miscellaneous

- Initiative chairs should be the sole point of contact with Beatrice ([Beatrice.hochegger@globalwellnessinstitute.org](mailto:Beatrice.hochegger@globalwellnessinstitute.org)) regarding changes and updates to the initiative pages on the GWI website and other logistic-related requests.
- It is very helpful for the overall organization of the GWI's initiatives if each chair responds as quickly as possible to emails from the GWI team. At the very least, please respond within two days to ensure smooth progress. This is understandably tricky with travel schedules, commitments, and more, but we make every effort to stay current with our information and often need your input.