



Initiative Best Practices

I. What is a GWI Initiative?

The mission of the nonprofit Global Wellness Institute's™ (GWI) is to “**Empower Wellness Worldwide**” through its five pillars: research, Initiatives, Roundtables, WellnessEvidence.com, and The Wellness Moonshot: A World Free of Preventative Disease. To strengthen and expand key sectors of the wellness industry, the GWI supports a variety of Initiatives, from Mental Wellness to Wellness for Children. This allows the Institute to further the international conversation about wellness in its diverse forms. An Initiative Chair, who is a renowned thought leader in their field, leads each GWI Initiative and is assisted by a Vice-Chair. **To ensure that an Initiative Chair understands the global context, you must have attended at least one previous Global Wellness Summit.**

II. Who makes the decision to launch an Initiative?

Initiatives come to life because an individual, business, or organization expresses a strong desire to lead an effort to educate people about a topic that will benefit the wellness industry in general and, in turn, the world. Initiatives reflect industry trends and issues of global importance to the wellness community. Occasionally, the GWI team will identify an important trend and reach out to a renowned thought leader to form a related Initiative. In the end, passion and commitment are the fuel that drives each Initiative.

III. How to start an Initiative:

- **Application Form:** Anyone interested in starting an Initiative should complete and submit the [GWI Initiative application form](#). The GWI team will evaluate the level of interest and how the Initiative will contribute to the “Empowering Wellness Worldwide mission.”
- **Initiative Name:** Please work with the GWI team to choose a name before the Initiative is formed. (Be prepared to suggest one or two names for consideration.) The name should be consistent with other existing Initiatives. Straightforward names that are easily understood by people within and outside of the industry work best; examples include Hot Springs Initiative, Consulting Best Practices Initiative, Sustainability Initiative, etc.
- **Vice-Chair:** The Initiative Chair should identify a Vice-Chair, who will support the Chair and fill in if the Chair is unavailable for an activity or scheduled call. Consistent communication and collaboration are key to the success of an Initiative.
- **Number of Members:** Six to 10 members work well and are a manageable size.
- **Global Representation:** It is important to have diversity in terms of countries, ages, etc., rather than limiting members to a single country. Please see the Member Guidelines at the end of this document; they should be shared with the group, so expectations about their involvement are transparent.



- **Length of Service:** If you are an Initiative Chair, please make it clear that if somebody joins the Initiative, they will be listed on the GWI website for two years and then be subject to review.
- **Website Assets:** Initiative Chairs will be asked to submit bios and photos of themselves and each member. In addition, Chairs should be prepared to provide an introductory statement regarding goals/objectives. The GWI team will use these assets to create the Initiative's page on globalwellnessinstitute.org.
- **GWI Logo:** Initiative Chairs and the Vice Chair may use the Initiative Chair GWI signature logo as part of their email signature. This helps spread the word about the important work of the Initiative and its relation to GWI—and gives visibility and credibility to the Chairs.

II. How to run an Initiative:

- **Deliverable:** Initiative members are encouraged to produce a yearly deliverable that will be posted on the Initiative's webpage. Examples include a manual, directory, industry list, white paper, infographic, etc. We encourage Initiatives to keep it simple to ensure that objectives are easily achieved and motivating to the team. Please note that changing directions and goals during the year is welcome to move the Initiative's goal forward. In addition, each Initiative is asked to submit its 5-10 industry trends at the beginning of each year. Those will be posted on the website and shared via a press release with the GWI network.
- **Time and Talent:** A discussion about the best use of everyone's talent and time and how to best serve the wellness industry are excellent topics for the first meeting.
- **Organizing Team Members:** Initiative Chairs might want to organize their members by contributions/roles for best success, e.g. when working on a whitepaper, there could be writers, reviewers, and advisors, and all could have different hours of commitment
- **Monthly Meetings:** One-hour meetings with Initiative members on the same day of the month and time of the day via phone and/or Skype or Zoom are the most successful format to accomplish Initiative work. Chairs and Vice-Chairs should connect more frequently as needed.
- **Timing of Meeting Calls:** Establish a call on the same day at the same time every month. (For example, the first Thursday of every month at 10:00 a.m. EST). (Take into consideration the time zones where members live.) Once a meeting is established, try to maintain a consistent date and time. (Send calendar invites for the entire year so members can plan ahead.)
- **Zoom Account:** We recommend setting up a Zoom account for calls so members can easily connect at no cost. Consider a Pro account for \$14.99/month—<https://zoom.us/pricing>). This allows for video, audio, or both at the same time.
- **Reminders and Agenda:** Send out an email reminder a week or so before the call and confirm the Zoom specifics. Send out an email reminder the day before the call with an agenda. An agenda helps ensure that the meeting is focused and objectives are met.



- **Calls Recorded:** Record calls so people who cannot join the call can listen afterward; this can easily be done via Zoom by clicking the record button.
- **Notes:** Ask someone to take notes during the call. After the call, have the person update the notes and send them to all Initiative members, along with a link to the recording.

III. Support from the GWI Team

- **Website:** Each Initiative is featured on the [GWI website](#) on its own Initiative page.
- **Visibility:** There is an opportunity to:
 - Be part of the [Global Wellness Brief](#), which is sent monthly to the GWI database
 - Be included in press releases
 - Send out email communications to the GWI database that are relevant to your sector
- **Potential Event Participation:** Suggest ways to bring the Initiative to life at various events worldwide, including the annual Global Wellness Summit. Ideas include recommending a key speaker, presenter, breakout session, or lunch topic discussion—or proposing that an Initiative deliverable be featured at an event.
- **Dropbox Folder:** The GWI provides a free Dropbox folder for each Initiative and its members. This should be used to save and share meeting recordings, agendas, meeting notes, working materials, etc.
- **Quarterly Initiative Calls:** During GWI quarterly Initiative calls, all Chairs, and Vice-Chairs exchange ideas and best practices and discuss questions and relevant topics. (The calls are recorded.) If both an Initiative Chair and Vice-Chair cannot attend, the Chairs select a representative from the Initiative membership to attend.
- **Collateral:** 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 four weeks in advance so materials can be ordered and shipped ahead of time.
- **Monthly Wellness Barometer by Thierry Malleret:** Initiative Chairs and Vice-Chairs are "VIPs" and will receive the exclusive Monthly Wellness Barometer, curated by global economist Thierry Malleret.
- **Advance Notice:** They will also receive advance notice of press releases and special invitations to GWI events.

IV. Evaluation: Continuing or Ending an Initiative

- **Evaluation:** 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. Initiatives should be fluid and relevant, and they should evolve, be nimble and change over time—and, at the appropriate time, come to a close.
- **Changes:** If a new person plans to assume responsibility for a current Initiative, he or she would decide on the Vice-Chair and build the group of members, including retaining some



or all of the current members. At the end of each year, Initiative Chairs should re-evaluate their members and make changes, additions, and updates for a successful upcoming year.

- **Chair Terms:** Each Initiative Chair enters a four-year term when he/she starts an Initiative. After those four years, the Chair could step down, continue or end the Initiative.

V. Communication with the GWI Team

- **One Point of Contact:** Initiative Chairs should be the sole point of contact with [Jessi Brandt](#). Communications would include changes and updates to the Initiative pages on the GWI website and other logistical requests.
- **Response Time:** Each Chair should respond as quickly as possible to emails from the GWI team. A maximum of a two-day turnaround is ideal.

VI. Further Initiative Best Practices

- **When someone inquires via the website about their interest in your initiative, please respond to them within 24 hours.**
- **Collaboration with other Initiatives:** In case Initiative Chairs want to emphasize on synergies between other Initiatives, they are invited to reach out to other Chairs to discuss potential collaborations.
- **Collective Values:** The GWI appreciates the volunteer work and participation of each Chair, Vice-Chair, and member. Please keep in mind that your work is part of our non-profit, educational values, and purpose. We kindly ask you not to monetize on Initiatives and emphasize your company and how it could benefit from running/participating in an Initiative.
- **Chair & Vice Chair Relationship:** The Initiative Chair is the group's leader and should be shepherding the Initiative toward its goal. The selected Vice Chair is a supportive function and should be available for Initiative Chair calls in case the Chair can't join and collaborate with the Chair on an ongoing basis. We recommend and encourage Chairs and Vice Chairs to communicate in addition to monthly meetings for the best results.
- **Face to Face Time:** Some Initiatives meet once a year on a face-to-face basis to strategize about the deliverable and to get to know each other better.
- **Global Wellness Summit Attendance:** We encourage all Initiative Chairs, Vice Chairs, and members to participate in the annual [Global Wellness Summit](#) to meet with like-minded thought leaders and experience our values and mission firsthand. While Chairs do not need to attend every year, to be an Initiative Chair, it is required that you attend at least one previous Global Wellness Summit.



Initiative Member Guidelines

To ensure a smooth work environment and to clarify expectations, we outline a few guidelines for Initiative members below:

- **ALIGNMENT & COLLABORATION:** Initiative members aim to share their energies toward the larger, aligned leadership mission of empowering wellness worldwide.
- **FORMAT:** Each Initiative holds monthly one-hour-long meetings (always at the same time, e.g., on the first Tuesday of each month), attended by members, the Chair, and Vice Chair, to discuss goals and the status of the Initiative and its projects. Those meetings are usually held via phone or Zoom.
- **MEETING PREPARATION:** Initiative members are expected to review the agenda and prepare for all meetings to ensure the time together is purpose-driven and effective.
- **MEETING ATTENDANCE:** Initiative members are expected to attend at least seven monthly Initiative meetings/calls per calendar year to move Initiative projects and goals forward. The success of the Initiative depends on participating in monthly meetings. If members cannot join a call, they should read the meeting notes and listen to the recording (if applicable). If they cannot, it is assumed they do not have time to commit and suggest fully serving in a future year.
- **CONTRIBUTION:** To achieve the Initiative's goal(s), members are expected to contribute to work outside of the monthly meetings. This could include researching, helping write a paper, creating an infographic, preparing and moderating a roundtable, etc.
- **MEMBER TERM & VISIBILITY:** Initiative members' terms are **two calendar years**, and they will be listed as thought leaders on the Global Wellness Institute's website during that time. Depending on Initiative goals and projects, there may be opportunities to publish material, be on a panel at the Global Wellness Summit, etc. At the end of each year, all memberships end automatically, and the GWI and Initiative Chair will evaluate the Initiative goals and objectives, members, progress, and coming year's needs. New members may be added as needed, and previous members may or may not choose/be asked to continue.
- **VOLUNTEER STATUS:** Initiative members, Chairs, and Vice Chairs pay their transportation and registration fees for all Initiative, GWI, and GWS events in which they choose to participate. Member time is on a (much appreciated) volunteer basis.