



# Strategic Plan

## 2010

# Table of Contents

Executive Summary.....	1
Programs/Grants/Initiatives.....	2
Administration/Operations.....	4
Fund/Resource Development.....	6
Public Awareness.....	8
Acknowledgements.....	10



## Executive Summary

The Living Well Foundation's (LWF-formally The Ward Five Healthcare Foundation) 2010 Strategic Plan is a result of the dedicated effort of the Board of Directors, Community Professionals and LWF Staff. The LWF 2010 Strategic Plan will guide the organization's operations and budget process and advance the LWF 2008 Community Plan and its three priorities: *Healthy Lifestyles, Pre-Natal/Infant Care and Access to Healthcare.*

It will also address four identified focus areas: *Programs/Grants/Initiatives, Administration/Operations, Fund/Resource Development and Public Awareness.*

The Strategic Plan provides for a concise and timely plan of action that will enable Board of Directors and Staff to successfully carry out the mission and vision of the LWF. It is our goal that our community be positively impacted in the areas of health and wellness.

### **Mission Statement**

The Mission of the Living Well Foundation is to improve the health and wellness of residents in the eight parish LWF service area.

### **Vision Statement**

To be a recognized leader of health-related initiatives, services and resources that enable residents of the Living Well Foundation service area to improve their quality of life.

\* Reviewed and updated by the Planning/Operations Committee on 12/09.

\* Reviewed and approved by the LWF Board of Directors on 1/5/10.

# LWF 2010 Strategic Plan

## PROGRAMS/GRANTS/INITIATIVES

Description:

Grant-making and Foundation driven initiatives will address the priorities identified in the LWF Community Plan.

### Areas to Address:

#### ✓ **Priorities**

- Healthy Lifestyles
  - Childhood obesity
  - Lack of physical activity
  - Poor nutritional habits
  - Family participation
  - Literacy

**Action Needed:** Three school-based pilot programs addressing healthy lifestyles for 5<sup>th</sup> graders.

**Outcome:** Increase physical activity and nutritional habits and decrease obesity

**Timeline:** 2008 - 2010

**Resources Needed:** Schools, activity centers, materials, funding

**Responsibility Of:** Programs/Grant Review Committee

- “Give a Kid a Smile” Day

**Action Needed:** Coordinate with school based health clinics (SBHC) and University of Louisiana at Monroe (ULM) and dentists

**Outcome:** Pre-screening of children and referrals for future care to dentists

**Timeline:** 2008 - 2010

**Resources Needed:** Facility, ULM, Dentists

**Responsibility Of:** LWF Staff, Programs/Grant Review Committee and SBHC Staff in conjunction with community volunteerism

- Pre-Natal/Infant Care
  - Teenage pregnancy
  - Sexual risk
  - Responsibility

**Action Needed:** Pilot programs within the school system that focus on the above areas through a grant process

- **Outcome:** Education and increased awareness

**Timeline:** 2008 - 2010

**Resources Needed:** Organization(s) that can provide those educational services

**Responsibility Of:** Programs/Grant Review Committee and LWF Staff

#### Access to Healthcare

- School Based Health Clinics

**Action Needed:** Ongoing funding for existing clinics; addition of SBHC(s) in East Ouachita Parish

**Outcome:** Access to basic medical services for students; reduce absenteeism of students; reduce time off from employment for working parents

**Timeline:** 2008-2010

**Resources Needed:** Funding, locations for new SBHC

**Responsibility Of:** Programs/Grant Review Committee and LWF Staff

- Virtual Community Clinic

**Action Needed:** To develop and establish needed partnerships

**Outcome:** Provide access to healthcare services for the individuals that are working but unable to afford adequate healthcare coverage and services

**Timeline:** 2008 - 2010

**Resources Needed:** Organization(s) to sponsor and administer

**Responsibility Of:** Programs/Grant Review Committee and Staff

## **ADMINISTRATION/OPERATIONS**

Description:

The administration/operations will provide the clerical and administrative functions necessary to support the ongoing services of LWF. This will include the annual review of the Strategic Plan as well as the review of the progress/performance of LWF grants.

### **Areas to Address:**

#### **✓ Board Oversight**

- To conduct an Annual Planning Meeting for the Board of Directors

**Action Needed:** Set up annual planning meetings

**Outcome:** Annual review/update of the Strategic and Community Plan as well as the Budget, Audit and Investment

**Timeline:** February of each year

**Resources Needed:** Location for event, Sponsor(s) for meal/event

**Responsibility Of:** Vice-Chair of Planning/Operations Committee, Audit Committee, Finance/Investment Committee and LWF Staff

- Annual Salary Reviews of the LWF Staff will be accomplished in November with results effective January 1<sup>st</sup> of the following year
- Annual Performance Reviews of the LWF Staff (conducted by the Executive Committee) will be separate from Salary Reviews and conducted in September

**Action Needed:** Salary/Performance reviews

**Outcome:** Reach peak performance for all employees

**Timeline:** September and November of each year

**Resources Needed:** Performance Review Forms and cost associated to annual raises

**Responsibility Of:** Executive Committee and Planning/Operations Committee

#### **✓ Staff Development**

- Training and Conferences

**Action Needed:** Provide access to training/conferences relevant to conduct Foundation activities

**Outcome:** Follow-up report by CEO/Staff after training/conference and setting goals relevant to Foundation activities

**Timeline:** Ongoing

**Resources Needed:** Funds to attend training/conferences

**Responsibility Of:** LWF Board of Directors (for approval), Planning/Operations Committee and LWF Staff

✓ **Staffing**

**Action Needed:** Review staffing needs on ongoing basis

**Outcome:** Staff according to the needs of current and future initiatives

**Timeline:** Ongoing

**Resources Needed:** As needed

**Responsibility:** Planning/Operations Committee and CEO

✓ **Annual Report to the Community**

**Action Needed:** Coordinate an annual meeting during the first week in November of each year, luncheon to report to the community

**Outcome:** Update the community as to the LWF highlights and updates for the year

**Timeline:** Ongoing

**Resources Needed:** Facility, Sponsor(s) for the luncheon

**Responsibility:** Executive Committee and LWF Staff

✓ **Annual Review of Strategic and Community Plan**

**Action Needed:** Review areas of focus and priorities

**Outcome:** To ensure our current method of operation matches the needs of our community

**Timeline:** February of each year

**Resources Needed:** To be included with the Annual Planning Meeting

**Responsibility:** LWF Board of Directors, Planning/Operations Committee and CEO

### ✓ Grant Review/Evaluation

**Action Needed:** Annual review of grants provided through LWF

**Outcome:** To ensure goals and objectives of grants provided are being met.

**Timeline:** Quarterly; annually at Annual Planning Meeting

**Resources Needed:** Evaluation results

**Responsibility:** Programs/Grant Review Committee and LWF Staff

## **FUND/RESOURCE DEVELOPMENT**

Description:

The fund/resource development area will focus on maintaining existing and securing additional resources and revenue through grants and contributions. This will be accomplished through grant-seeking/writing, investment development and appeals to the faith-based and civic organizations as well as private/corporate business communities.

### **Areas to Address**

#### ✓ Fund Development

- Accessing Grants

**Action Needed:** Research to determine if LWF is eligible to receive grants to administer programs or help organizations receive grants.

**Outcome:** Awareness of available resources to allow LWF or LWF funded organizations to be able to increase/leverage funding

**Timeline:** Ongoing; report to the LWF Board of Directors

**Resources Needed:** Contacting local, state, federal foundations

**Responsibility Of:** Planning/Operations Committee and CEO

#### ✓ Accessing Donors

- Charitable Giving
  - Donors

**Action Needed:** Develop charitable giving model; Make charitable giving model available to the community

**Outcome:** A charitable giving model that will allow for increased funding/resources for the Foundation

**Timeline:** Ongoing

**Resources Needed:** Model program, donors

**Responsibility Of:** Planning/Operations Committee and CEO

- Corporate Sponsors

**Action Needed:** A system to contact and present to Corporations

**Outcome:** Corporate funding sponsors for specific initiatives/events

**Timeline:** Ongoing

**Resources Needed:** Model to present to corporations to consider giving/partnering

**Responsibility Of:** Planning/Operations Committee and CEO

- Investment Management

**Action Needed:** Quarterly review of results; annual review of policy

**Outcome:** Increase investment

**Timeline:** Ongoing quarterly/annually

**Resources Needed:** Reports

**Responsibility Of:** Finance/Investment Committee, Planning/Operations Committee and CEO

### ✓ **Resource Development**

- Advisory Council

**Action Needed:** Plan to develop council

**Outcome:** An Advisory Council to support the ongoing efforts of LWF

**Timeline:** 2009 - 2010

**Resources Needed:** Plan of action; volunteers

**Responsibility Of:** Planning/Operations Committee and CEO

- Corporate, Faith Based, Civic Partnerships

**Action Needed:** Establishing partnerships

**Outcome:** Utilize resources/services that support the LWF operations/services

**Timeline:** 2008 – 2010

**Resources Needed:** Partners that believe and support the LWF mission and vision

**Responsibility Of:** CEO

- Annual Meeting

**Action Needed:** Develop presentation packet to allow new partners opportunity to contribute to or serve with LWF

**Outcome:** Increase resources through additional partners

**Timeline:** Annually

**Resources Needed:** Information describing how to become involved with LWF

**Responsibility Of:** Executive Committee and LWF Staff

## **PUBLIC AWARENESS**

Description:

The public awareness area will serve as a voice for the Foundation in establishing and branding our name and identity as well as communicating the purpose, mission, vision and successes of the Foundation. This will be accomplished through efforts of the Board of Directors, Advisory Council, staff and professional services.

### **Areas to Address**

#### **✓ Printed Material**

- Brochures
- Annual Report
- Logo

**Action Needed:** Develop printed material for ongoing and annual needs; logo to be on all material directly/indirectly associated with LWF

**Outcome:** Informing the general public about LWF

**Timeline:** Ongoing

**Resources Needed:** Layout and printing of material and funds to develop

**Responsibility Of:** LWF Staff

✓ **Communications**

- Public Service Announcements
- Radio/TV Appearances
- Newspaper semi-annual/annual (LWF highlights)
- Newsletter (electronic paper copies)

**Action Needed:** Requesting the services to be donated from media as activities and needs avail themselves

**Outcome:** Informing the community of LWF services and activities

**Timeline:** Ongoing as activities dictate the need

**Resources Needed:** Communication - advertising services through mass media

**Responsibility Of:** CEO

✓ **Special Events**

- Annual Report to the community – “Luncheon”

**Action Needed:** Coordinate annually with WM/WO Chamber of Commerce a 1<sup>st</sup> Friday Luncheon

**Outcome:** Connect LWF name and identity with services to the community

**Timeline:** 2008 - 2010

**Resources Needed:** Facility, food, information to present

**Responsibility Of:** LWF Staff

## ACKNOWLEDGEMENTS

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