

Assignment Sheet
Citizens – Strategic Plan Goal #5

Tasks	Committee Members	Notes
<p>5.1. Discovery: To position Citizens for continued success and greater growth, the committee will develop a report by September 2017 evaluating current operational capacity.</p>	<p>Joe Milone; Nicole Zerillo; Full Committee</p>	<ul style="list-style-type: none"> To be shared with other committees, as requested.
<p>5.1.a. By July 14, identify changing demographics of program participants (e.g., age, diagnoses, behaviors, aspirations) and evolving support needs (e.g., increase of real-time approvals)</p>	<p>Chris O'Connor; Ann Miller; Nicole Uterano</p>	<ul style="list-style-type: none"> Gather data for actionable, snapshot report that fellow committee members can use to inform their assessments.
<p>5.1.a.1. By July 14, review primary sibling contact info to identify gaps in Central Enrollment/ Medisked.</p>	<p>Joe Golio</p>	<ul style="list-style-type: none"> Gather data for actionable, snapshot report that fellow committee members can use to inform their assessments.
<p>5.1.a.2. By Aug. 4, share org chart and staffing data (e.g., number of employees in specific roles; length of service; open positions; available employee survey results)</p>	<p>Jason Persan; Chris O'Connor</p>	
<p>5.1.a.3. By Aug. 4, report on additional support positions created for Citizens' changing audiences</p>	<p>Jason Persan; Chris O'Connor</p>	
<p>5.1.a.4. By July 14, review primary sibling contact info to identify gaps in Central Enrollment/ Medisked.</p>	<p>Joe Golio</p>	<ul style="list-style-type: none"> Gather data for actionable, snapshot report that fellow committee members can use to inform their assessments.
<p>5.1.b. By Aug. 1, conduct audit of existing internal and external communications channels and collateral.</p>	<p>Nicole Zerillo</p>	<ul style="list-style-type: none"> Provide data for actionable, snapshot report that fellow committee members can use to inform their assessments.
<p>5.1.b.1. By Sept. 19, evaluate status of brand perception assessments, e.g. surveys,</p>	<p>Nicole Zerillo</p>	

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focus groups, etc.		
5.1.c. By Aug. 4, share statistics and data from incident management procedures and statistics.	Ann Miller	<ul style="list-style-type: none"> • Provide data for actionable, snapshot report that fellow committee members can use to inform their assessments.
5.1.d. By Aug. 7, share statistics and data on customer acquisition, engagement and service provision.	Joe Golio	<ul style="list-style-type: none"> • Provide data for actionable, snapshot report that fellow committee members can use to inform their assessments.
5.1.d.1. By Aug. 7, create a comprehensive list of existing vendors.	Joe Golio; Nicole Zerillo	
5.1.d.2. By Aug. 7, create a comprehensive list of organizations that have volunteered over the past three years.	Nicole Zerillo	
5.1.e. By Sept. 19, complete brand environmental scan, including comparative matrix of competitors.	Chris O'Connor; Joe Milone; Nicole Zerillo	<ul style="list-style-type: none"> • Provide data for actionable, snapshot report that fellow committee members can use to inform their assessments.
5.1.f. By TBD, identify legislative agenda, along with governmental and policy issues impacting the organization.	Nicole Zerillo	<ul style="list-style-type: none"> • Provide data for actionable, snapshot report that fellow committee members can use to inform their assessments.
5.2. Strategy Development: By end of April 2018, assess findings as a committee, brainstorm in specialty areas in response to:	Joe Milone; Nicole Zerillo	<ul style="list-style-type: none"> • Committee chairs convene meeting with committee members. • Discuss snapshot report of recommendations for areas to explore to develop organizational capacity. • Proposed ideas finalized in report, with recommendation for next steps and additional committee members.
5.2.a. Staffing and training resources needed to strengthen current services and support future growth opportunities.	Nicole Uterano; Jason Persan	<ul style="list-style-type: none"> • Benchmarked beside existing resources, propose opportunities to strengthen existing programs now and over the next three years. • Provide snapshot report of recommendations.

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5.2.b. Quality assurance resources needed to strengthen current services and support future growth opportunities.	Ann Miller	<ul style="list-style-type: none"> • Benchmarked beside existing resources, propose opportunities to strengthen existing programs now and over the next three years. • Provide snapshot report of recommendations.
5.2.c. Technological resources needed to strengthen current services and support future growth opportunities.	Tony Daniels; Joe Milone	<ul style="list-style-type: none"> • Benchmarked beside existing resources, propose opportunities to strengthen existing programs now and over the next three years. • Provide snapshot report of recommendations.
5.2.c.1. Update firewall by Q1 2017 to increase accessibility to digital assets across organization.	Tony Daniels; Joe Milone	<ul style="list-style-type: none"> • Finalize updates to firewall.
5.2.c.1.a. Connect VPN to all sites	Tony Daniels; Joe Milone	
5.2.c.2. Update Wi-Fi by Q1 2018 to increase accessibility to digital assets across organization.	Tony Daniels; Joe Milone	<ul style="list-style-type: none"> • Roll out of updated Wi-Fi. • Equipment ordered to enhance Wi-Fi.
5.2.c.3. Finalize installation of Avaya phone system , including on-site coverage off site through Outlook, phone and app with testing through Q3 2017 and Q3 2018 roll out.	Tony Daniels; Joe Milone	<ul style="list-style-type: none"> • Evaluate metrics from testing of system. • Complete roll out of system. • Installation complete.
5.2.c.3.a. App in testing.	Tony Daniels; Joe Milone	<ul style="list-style-type: none"> • App in testing (on schedule).
5.2.c.4. Update Intranet for end of Q1 2018 to offer more accessible online venue to	Tony Daniels; Joe Milone	<ul style="list-style-type: none"> • Roll out of updated Intranet.

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access necessary employee information.		
5.2.d. Leadership, linkages and affiliation needed to strengthen current services and support future growth opportunities.	Joe Golio; Nicole Zerillo	<ul style="list-style-type: none"> • Benchmarked beside existing resources, propose opportunities to strengthen existing programs now and over the next three years. • Provide snapshot report of recommendations.
5.2.d.1. Evaluate opportunities to strengthen strategic alliances with partners, donors, and volunteers.	Nicole Zerillo	
5.2.d.2. Evaluate areas of opportunities for fundraising and grants.	Nicole Zerillo	
5.2.d.2.a. Leverage wealth prospecting software to increase funding.		
5.2.e. Examine existing marketing/communications resources with current services and support future growth opportunities.	Nicole Zerillo	<ul style="list-style-type: none"> • Benchmarked beside existing resources, propose opportunities to strengthen existing programs now and over the next three years. • Provide snapshot report of recommendations.
5.2.e.1. Clarify brand promise, attributes, key messages and drivers to respond to the findings and ideas generated by the committee.	Nicole Zerillo	
5.2.e.1.a. Develop content marketing calendar to update on ongoing basis to align with findings and opportunities.	Nicole Zerillo; Nicole Uterano	

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5.2.e.2. Refine placement in brand architecture.	Nicole Zerillo	
5.2.e.3. Create brand standards to ensure consistency across brand vehicles.	Nicole Zerillo	
5.3. Implementation: Through August 2018, continue sustainable development of recommended growth opportunities for:	Joe Milone; Nicole Zerillo	
5.3.a. Program pipeline.	Chris O'Connor; Nicole Uterano	
5.3.b. New business.	Joe Golio	
5.3.c. Quality benchmarks, such as medical policies and procedures anticipating growth.	Ann Miller	
5.3.d. Fundraising and grants	Nicole Zerillo	

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5.3.e. Technology	Joe Milone	
5.3.f. Brand awareness	Nicole Zerillo	
5.3.f.1. Implement brand identity guidelines including organizational access to materials bank.	Nicole Zerillo	
5.3.f.2. Roll out updated branding.	Nicole Zerillo	
5.3.f.3. Begin implementation of integrated content marketing plan for building brand awareness of specific programs among key audiences.	Nicole Zerillo	
5.3.f.3.a. Identify and connect with team members across organization through brand ambassador program to respond to timely topics and create features.	Nicole Zerillo	
5.3.f.3.b. Develop guidelines for staff to share their contributions to the organization's mission, through newsletters, editorial schedule for blog and advocacy opportunities.	Nicole Zerillo	

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5.4. Begin implementation of monitoring and measurement of marketing communications initiatives.	Nicole Zerillo	<ul style="list-style-type: none">• Content consumption metrics set.• Lead generation metrics set.• Sales metrics set.