2014-2015 TAHU Strategic Plan

Mission Statement:
The mission of the Texas Association of Health Underwriters is to inform and protect the consumer by enhancing the professional growth of its members.

Vision Statement:
To protect the future of consumer healthcare financing through education and advocacy while maintaining the highest standards of Ethics and Integrity.

Chair	Goal	Steps To Achieve Goal		Due Date	Completed	NOTES
Membership	Maintain positive growth each quarter	Hold a membership blitz	1st Q	9/30/14	NO	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
		Short range contests	1st Q	9/30/14	NO	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
		Follow award criteria - keep up throughout the year to include gathering documentation for the dropbox.	1st Q	9/30/14	9/30/14	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
	Maintain retention rate at 85%	New Member Electronic Kit	1st Q	9/30/14	9/30/14	85.70%
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
		Work the lapsed list on a monthly basis	1st Q	9/30/14	9/30/14	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
		Short Range Contests	1st Q	9/30/14	NO	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
Marketing	Obtain a sponsor for 4th quarterly board meeting	Development of sales approach to potential sponsors	4th Q	5/6/15		
	Assist convention committee with obtaining sponsors	Development of sales approach to potential sponsors	2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	5/8/15		
Awards						
	Apply for NAHU awards (Landmark, Pres Citation, DSA, Osler, Spirit of Freedom, Lege, Others as Necessary)	Communicate award criteria and timeline with chapters - Landmark Pres Citation and Website Legislative Excellence and Media Relations	1st Q	9/30/14	9/30/14	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
		Set up NAHU awards dropbox folder for TAHU Board	1st Q	9/30/14	9/30/14	
		Hold awards training at TAHU Convention	3rd Q	5/7/15		
	TAHU Online award submissions	Have first training with local chapters on dropbox submission process	2nd Q	12/31/14		
		Have 25% of awards submitted through dropbox	3rd Q	2/6/15		
Professional Development	Improve professional development activities for members and the ability for them to obtain various designations, etc.	Consolidate chapter reports to TAHU dropbox	1st Q	9/30/14	NO	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
		Update TAHU course list with NAHU-spoonsored programs through reciprocity.	1st Q	9/30/14	NO	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
		Hold quarterly conference calls/personal contact (other than email) to promote industry designations with local chapter chairs	1st Q	9/30/14	9/30/2014	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		

		Review of courses due to expire and contact the instructor on whether to renew or develop a new course	1st Q	9/30/14	9/30/2014	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
		Develop the CHRS designation for TAHU members.	4th Q	6/30/15		
Media	Increase chapter awareness of press release protocol	Quarterly conference calls with chapter media chair and president	1st Q	9/30/14	9/30/2014	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
	Increase chapter motivation to reach out to local media outlets	Distribute success stories/articles	1st Q	9/30/14	9/30/2014	Via Facebook and verification stories picked up
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
		Keep a chapter "report card" on accountability	1st Q	9/30/14		
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
	Increase social media awareness	Set up a LinkedIn account for TAHU	2nd Q	12/31/14		
		Updating Facebook page with press releases	1st Q	9/30/14	9/30/14	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
	Improve communication with NAHU Media Relations	Make frequent contacts with NAHU	1st Q	9/30/14		
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
Newsletter	Keep the membership informed on association activities with articles to enhance knowledge and member development.	Keep magazine at 32 pages per contract	1st Q	9/30/14	NO - 24	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
		Receive articles and pictures from at least 10 of 14 chapters	1st Q	9/30/14	9/30/14	13
			2nd Q	12/31/14		10
			3rd Q	3/31/15		
			4th Q	6/30/15		
		Include a "box" of informational links of where to find industry-related information, ie., designations, LPRT, etc.	1st Q	9/30/14	9/30/14	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
		EC Memorandum (once per quarter)	1st Q	9/30/14	NO	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
TAHU Enews	Keep membership informed of state chapter activities on a regular basis.	Distribute Enews quarterly to include information regarding chapter activities	1st Q	9/30/14	9/30/14	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
Convention	Achieve or exceed budgeted attendance	Develop a appealing and catchy theme	2nd Q	12/31/14		
		Engage local chapter's participation in attendance & serving on the commit	2nd Q	12/31/14		
		Actively market exhibitors and sponsors early	2nd Q	12/31/14		
		Actively market to other Associations with similar interests	2nd Q	12/31/14		
		Marketing emails to each chapter	2nd Q	12/31/14		
		Marketing through social media	2nd Q	12/31/14		
		Re-evaluate the structure of the Hollis Roberson awards dinner	3rd Q	3/31/15		

Legislation	Keep membership informed on all association, state and federal legislative activities.	Have a Legislative Day focused on industry happenings with regard to ACA	4th Q	4/1/15		
		Hold Monthly Legislative Teleconferences with the Legislative Council and Local Chapter Legislative Chairs and Chapter Presidents.	1st Q	9/30/14	9/30/14	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
		Develop global positions for board consideration	1st Q	9/30/14	10/24/14	
		Distribute a minimum of 3 Operation Shouts at the TAHU level	4th Q	6/30/15		
		Develop and offer a presentation on "How To Track A Bill" to all chapter Legislative Chairs	4th Q	6/30/15		
		Distribute the Postcards From The Ledge with a minimum of 12 by 4th Q	1st Q	9/30/14	NO	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
		Develop legislative press releases with a minimum of 12 by 4th Q	1st Q	9/30/14	NO	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
	Confirm commitment with current Key Contacts	Provide role description and confirm future participation	1st Q	9/30/14	In process	
	Identify new Key Contacts for exiting/replacement offices	KC Chair, Lobbyist, Chapter Presidents and Lege Council work together to identify	4th Q	6/30/15		
	Increase TAHUPAC/HUPAC contributions.	25% growth focusing on past contributors as well as new "small ball"	1st Q	9/30/14	NO	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
		Build relationships with local PAC chairs with goal of increasing communication/gaining contributors on a monthly basis	1st Q	9/30/14	9/30/14	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
		Top 3 TAHUPAC Contributor Recognition	4th Q	5/7/15		
Chapter Presiden	Improve membership numbers and attendance at local chapter meetings/functions.	Increase member attendance at monthly meetings by including focus on relevant industry-related presentations	1st Q	9/30/14	9/30/14	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
		Plan quarterly programs in advance and distribute to membership	1st Q	9/30/14	9/30/14	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
		Offer incentives to non-members to become members	1st Q	9/30/14	9/30/14	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
		Actively promote member participation in TAHU state events and TAHUPAC and HUPAC	1st Q	9/30/14	9/30/14	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
	Improve chapter communications to the membership	Utilizing the chapter website to provide relevant information, ie., press releases, newsletters, video testimonials, etc., and social media	1st Q	9/30/14	9/30/14	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
Public Outreach	Educate/improve the public perception of what association members do and how the association assists the consumer	Reach out to the chapter presidents for chair representation	1st Q	9/30/14	9/30/14	
		Hold CHIP Event with the Community	3rd Q	3/31/15		
		Publish articles for the TAHU News; 1 on CHIP and 1 on Chapter	3rd Q	3/31/15		

		Support	4th Q	6/30/15		
SysOp		State and chapter board rosters updated	1st Q	9/30/14	9/30/14	
Technology	Improve the traffic to the TAHU website and win the NAHU website award	Improve the content on the website and keep it current	1st Q	9/30/14	NO	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
Chapter Support	Improve relations with small chapters	Meet with small chapter presidents to discuss obstacles/challenges	2nd Q	12/31/14		
	Investigate new chapter development	Re-establishing a chapter in the Valley	3rd Q	3/31/15	In process	
Immed Past Pres	Increasing awareness and garnishing support for the TAHU Honorees Corporation	Highlighting its importance and purpose at all board meetings and Association events.				
			1st Q	9/30/14	NO	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		
	P&P Sunset Review	Monitor all TAHU P&Ps	1st Q	9/30/14	9/30/2014	
			2nd Q	12/31/14		
			3rd Q	3/31/15		
			4th Q	6/30/15		