2019-2020 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:

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Chair	Goal	Steps To Achieve Goal		Due Date	Complete?	NOTES
EC Immed Past Pres	TAHU Honorees Corporation	Emphasize importance of all opportunities for contributions at BOD meetings	1st Q	9/30/19		
		conference calls and TAHU Events	2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	6/30/20		
	P&P Sunset Review	Monitor all TAHU P&Ps and ensure they are current and up to date	1st Q	9/30/19		
			2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	6/30/20		
	Promote LPRT program and achieve blue ribbon status	Educate the chapters on the program by promoting through blast emails and	1st Q	9/30/19		
		working with them in gathering information necessary to achieve blue	2nd Q	12/31/19		
		ribbon status.	3rd Q	3/31/20		
			4th Q	6/30/20		
EC Secretary						
Membership	Maintain positive growth each quarter and increase retention		1st Q	9/30/19		
Growth			2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	6/30/20		
	Increase Awareness and Share Best Practices	Monthly chapter calls with Chapter Presidents, Membership/Retention Chairs	1st Q	9/30/19		
			2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	6/30/20		
		Provide membership powerpoint presentation for local chapters to use	1st Q	9/30/19		
		during luncheons and events				
		Distribute prospective new member packet	2nd Q	12/31/19		
	Monthly Outreach	Monthly Chapter eMail with Membership Results/Updates/Reminders	1st Q	9/30/19		
			2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	6/30/20		
	Membership Recruitment-Landmark Award	Hold a membership blitz	1st Q	9/30/19		
			2nd Q	12/31/19		
			3rd Q	3/31/20		
	Membership Campaign-Landmark Award	100% Board recruitment contest	1st Q	9/30/19		
			2nd Q	12/31/19		
			3rd Q	3/31/20		
	Membership Campaign-Landmark Award	Ongoing membership campaign lasting 3-6 months	1st Q	9/30/19		
			2nd Q	12/31/19		
			3rd Q	3/31/20		
	Landmark Award Documentation	Call minutes and attendance template-Send to Awards Chair	2nd Q	12/31/19		
Membership	Increase retention rate to 85%		1st Q	9/30/19		
Retention			2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	6/30/20		
	Equip Membership/Retention Chairs	eCommerce Training	1st Q	9/30/19		
		Monthly Email Reminders to Local Membership/Retention Chairs to pull	1st Q	9/30/19		
		the new member report/lapse report/billed not paid	2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	6/30/20		
Chapter Support	Reach out to Chapter Presidents in advance of EC visits to	Determine if chapters need assistance with marketing efforts and	1st Q	9/30/19		
	see how their marketing of the luncheon is going	membership recruitment to concide with their events	2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	6/30/20		
	Work with West Texas and San Angelo chapters to increase membership	Schedule monthly conference calls to discuss issues, hold webinars and CE	1st Q	9/30/19		
		at luncheons and special events	2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	6/30/20		
EC Treasurer						
Professional	Educate chapter PD chairs on development process in providing dynamic	Prepare and Disbribute Potential Speaker list to all PD Chairs	1st Q	9/30/19		
Development	presentations					
		Schedule initial and monthly PD Calls	1st Q	9/30/19		
		Attend Chapter Leadership NAHU Monthy Calls	1st Q	9/30/19	7/24/19	
		Meet with PD Chairs and Develop Scheduling Plan of Action	1st Q	9/30/19		
		Meet with Misty and Nicole and re: Certification Courses?	2nd Q	12/31/19		
Awards	Apply for NAHU Awards	Communicate award criteria and timeline with board chairs - Landmark,	1st Q	9/30/19		
		Presidential Citation, Media Relations, Legislative Excellence, Website	2nd Q	12/31/19		
			3rd Q	3/31/20		

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	Combine award applications with award guidebook	Emulate Pacesetter award application and clean up awards guidebook criteria	1st Q	9/30/19		
	Begin process of aligning state awards criteria with NAHU criteria for the same or similar awards	Emulate NAHU awards applications	1st Q	9/30/19		
			2nd Q	12/31/19		
	Begin process to set up online submissions	Work with NAHU to build out process	4th Q	5/31/20		
EC 2nd VP						
Legislation	Keep membership informed on all association, state and federal legislative activities.	Have a Legislative Day on 2/5/20 focused on industry legislative and regulatory developments	3rd Q	3/31/20		
		100 attendees at DATC and 15 agencies at rountable function	3rd Q	3/31/20		
		Proactive communications with respect to major state or federal issues (minimum of 3 over next 12 months)	1st Q	9/30/19		
			2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	6/30/20		
		Hold Monthly Teleconferences with the Legislative Council	1st Q	9/30/19		
			2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	6/30/20		
		Hold Bi-Monthly Legislative Teleconferences with the Legislative Council and Local Chapter Legislative Chairs and Chapter Presidents	1st Q	9/30/19		
			2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	6/30/20		
		Develop 2 legislative press releases by 4th quarter	4th Q	6/30/20		
	Develop Robust Key Contacts Program	100% of assignment to targeted legislators	4th Q	6/30/20		
	Industry Relations	6 meetings by the 4th quarter	4th Q	6/30/20		
	Increase member participation in HUPAC and TAHUPAC	100% of State and Local Board participation	1st Q	9/30/19		
			2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	6/30/20		
		Top 3 TAHUPAC Contributor Recognition	4th Q	6/30/20		
	Legislative Article in TAHU magazine	One per issue of the magazine	1st Q	9/30/19		
			2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	6/30/20		
EC 1st VP						
Media	Actively engage with Chapter Presidents for Press Release to local media	Hold quarterly conference calls	1st Q	9/30/19		
			2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	6/30/20		
	Actively engage with Chapter Presidents for Op Ed pieces to local media	Hold quarterly conference calls	1st Q	9/30/19		
			2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	6/30/20		
	Actively engage with Chapter Media Chairs for Press Release to local media	Hold quarterly conference calls	1st Q	9/30/19		
			2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	6/30/20		
	Actively engage with Media Chair for Op Ed pieces to local media	Hold quarterly conference calls	1st Q	9/30/19		
			2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	6/30/20		
	Gather Media contacts from local Media Chairs	Update media contacts	1st Q	9/30/19		
	Submit Press Releases to Media		1st Q	9/30/19		
			2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	6/30/20		
	Submit Op Ed Pieces to the Media		1st Q	9/30/19		
			2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	6/30/20		
	Present Working With The Media presentation at the Strategic Planning Meeting	Present Working With The Media presentation at Strategic Planning Meeting	1st Q	9/30/19		
	Submit National Media Award		3rd Q	3/31/20		Actual deadline is February 20th, 2020
	Media Relations chair attends Annual Convention		4th Q	6/30/20		
	Media Relations chair attends Cap Conference		3rd Q	3/31/20		

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TAHU Enews	Keep membership informed of state chapter activities	Distribute Enews bi-monthly to include information regarding chapter	1st Q	9/30/19		
	on a regular basis.	activities.	2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	6/30/20		
		Update format and look to include Hot links to FB, etc.	1st Q	9/30/19		
Newsletter	Keep the membership informed on association activities	Have electronic issues published on time each quarter.	1st Q	9/30/19		
	with articles to enhance knowledge and member	(Per issue requirements and due dates will be distributed to Chapter	2nd Q	12/31/19		
	development.	Presidents and TAHU Board by August 1, 2019)	3rd Q	3/31/20		
			4th Q	6/30/20		
Technology	Improve the traffic to the TAHU website and win the NAHU website award	Work with awards chair	1st Q	9/30/19		
			2nd Q	12/31/19		
SysOp	Keep communication channels open and current	Update state and chapter board rosters	1st Q	9/30/20		
EC President Elect						
Convention	Achieve or exceed budgeted attendance	Develop an appealing and catchy theme	1st Q	9/30/19		
		Identify important topics of interests for brokers/members.	1st Q	9/30/19		
		What is their main focus and concerns as well as target population				
		Save the date in Enews & TAHU News	1st Q	9/30/19		
		Save the date to potential exhibitors & sponsors that includes an offer to	1st Q	9/30/19		
		sponsor the same event.				
		Build agenda with dynamic speakers focused around the needs identified	1st Q	9/30/19		
		by brokers/members and driving increased attendance				
		Actively market to exhibitors & sponsors	2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	4/30/20		
		Engage local chapter's participation and increase marketing emails to each	2nd Q	12/31/19		
		chapter.	3rd Q	3/31/20		
			4th Q	4/30/20		
		Actively market to other associations and trade industries	2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	4/30/20		
		Marketing through social media and convention app	2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	4/30/20		
Chapter Presidents	Promote 100% TAHUPAC participation by local board members	Include on every board meeting agenda for discussion	1st Q	9/30/19		
			2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	6/30/20		
	Promote 100% HUPAC participation by local board members	Include on every board meeting agenda for discussion	1st Q	9/30/19		
			2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	6/30/20		
	Promote 100% Day at the Capitol attendance by local board members	Include on every board meeting agenda for discussion	1st Q	9/30/19		
			2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	6/30/20		
	Promote 100% Convention attendance by local board members	Include on every board meeting agenda for discussion	1st Q	9/30/19		
			2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	6/30/20		