2022-23 TAHU Strategic Plan					
Mission Statement:				9/30/22	
The mission of the Texas Association of Health Underwriters is to inform and protect the consumer by enhancing the professional growth of its members.				12/31/22	
				3/31/23	
Vision Statement:				6/30/23	
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**	**Complete?**
EC Immed Past Pres	TAHU Honorees Corporation	Emphasize importance of all opportunities for contributions at BOD meetings	1st Q	9/30/22	
		conference calls and TAHU Events	2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
	Establish a Governance committee to review Bylaws and P&Ps	Monitor all TAHU P&P's/Sunset review and ensure they are current and up to da	1st Q	9/30/22	
			2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
	Bylaws review		4th Q	6/30/23	
	Promote LPRT program and achieve blue ribbon status	Educate the chapters on the program by promoting through blast emails and	1st Q	9/30/22	
		working with them in gathering information necessary to achieve blue	2nd Q	12/31/22	
		ribbon status.	3rd Q	3/31/23	
			4th Q	6/30/23	
EC Secretary					
Membership	Maintain positive growth each quarter and increase retention		1st Q	9/30/22	
Growth			2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
	Increase Awareness and Share Best Practices	Monthly chapter calls with Chapter Presidents, Membership/Retention Chairs	1st Q	9/30/22	
			2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
		Provide NAHU membership powerpoint presentation for local chapters to use	1st Q	9/30/22	
		during luncheons and events			
		Distribute prospective new member packet (NAHU Packet)	2nd Q	12/31/22	
	Monthly Outreach	Monthly Chapter eMail with Membership Results/Updates/Reminders	1st Q	9/30/22	
			2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
	Membership Recruitment-Landmark Award	Hold a membership blitz	1st Q	9/30/22	
			2nd Q	12/31/22	
			3rd Q	3/31/23	
	Membership Campaign-Landmark Award	100% Board recruitment contest	1st Q	9/30/22	
			2nd Q	12/31/22	
			3rd Q	3/31/23	
	Membership Campaign-Landmark Award	Ongoing membership campaign lasting 3-6 months roadshow	1st Q	9/30/22	
			2nd Q	12/31/22	

			3rd Q	3/31/23	
	Landmark Award Documentation	Call minutes and attendance template-Send to Awards Chair	2nd Q	12/31/22	
Membership	Increase retention rate to 85%		1st Q	9/30/22	
Retention			2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
	Equip Membership/Retention Chairs	eCommerce Training	1st Q	9/30/22	
		Monthly Email Reminders to Local Membership/Retention Chairs to pull	1st Q	9/30/22	
		the new member report/lapse report/billed not paid	2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
Chapter Liaison	Reach out to Chapter Presidents in advance of EC visits to	Determine if chapters need assistance with marketing efforts and	1st Q	9/30/22	
	see how their marketing of the membership meetings is going	membership recruitment to concide with their events	2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
	DEI Marketing piece		2nd Q	12/31/22	
	Value of Membership Education roadshow	Schedule monthly conference calls to discuss issues, hold webinars and CE	1st Q	9/30/22	
		at luncheons and special events	2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
Medicare Chair	Hold a medicare Summit in august 2023	Planning and sponsorships completed by Q2/Q3	2nd Q	12/31/22	
			3rd Q	3/31/23	
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	9/30/22	
Development	presentations				
		Schedule initial and monthly PD Calls	1st Q	9/30/22	
		Meet with PD chairs and develop scheduling plan of action	1st Q	9/30/22	
		Provide training for Virtual CE sessions for PD Chairs	1st Q	9/30/22	
			2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
Awards	Apply for NAHU Awards	Communicate award criteria and timeline with board chairs - Landmark,	1st Q	9/30/22	
		Presidential Citation, Media Relations, Legislative Excellence, Website	2nd Q	12/31/22	
			3rd Q	3/31/23	
	Continue online submissions	Continue process for TAHU chapter submissions	1st Q	9/30/22	
			3rd Q	12/31/22	
			4th Q	3/31/23	
	Conduct monthly meetings with local awards chairs		1st Q	9/30/22	
			2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
Vanguard	Provide communication and support for chapter goals	provide specific initiatives for chapter levels	1st Q	9/30/22	
		succession planning	2nd Q	12/31/22	
		provide information to chapters to attend NAHU calls	3rd Q	3/31/23	

			4th Q	6/30/23	
		Host a vanguard event during the year	1st Q	9/30/22	
			2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
		work with colleges with insurance/risk management	1st Q	9/30/22	
			2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
LPRT	Promote LPRT	4 times a year	1st Q	9/30/22	
			2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
EC 2nd VP					
Legislation	Keep membership informed on all association, state and	Have a Legislative Day focused on industry legislative and	3rd Q	3/31/23	
	federal legislative activities.	regulatory developments			
		150 attendees at DATC and 20 agencies at roundtable function	3rd Q	3/31/23	
		Proactive communications with respect to major state or federal issues	1st Q	9/30/22	
		weekly	2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
		Hold Monthly Teleconferences with the Legislative Council	1st Q	9/30/22	
			2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
		Hold Monthly Legislative Teleconferences with the Legislative Council and	1st Q	9/30/22	
		Local Chapter Legislative Chairs and Chapter Presidents	2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
		Develop 2 legislative press releases/ OpEd by 4th quarter	4th Q	6/30/23	
	Develop Robust Key Contacts Program	100% of assignment to targeted legislators	4th Q	6/30/23	
	Industry Relations	8 meetings by the 4th quarter	4th Q	6/30/23	
	Increase member participation in HUPAC and TAHUPAC	100% of State and Local Board participation	1st Q	9/30/22	
			2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
		Top 3 TAHUPAC Contributor Recognition	4th Q	6/30/22	
	Legislative Article in TAHU magazine	One per issue of the magazine	1st Q	9/30/22	
			2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
EC 1st VP					

Media	Actively engage with Chapter Presidents for Press Release to local media	Hold quarterly conference calls	1st Q	9/30/22	
			2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
	Actively engage with Chapter Presidents for Op Ed pieces to local media	Hold quarterly conference calls	1st Q	9/30/22	
			2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
	Actively engage with Chapter Media Chairs for Press Release to local media	Hold quarterly conference calls	1st Q	9/30/22	
			2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
	Actively engage with Media Chair for Op Ed pieces to local media	Hold quarterly conference calls	1st Q	9/30/22	
			2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
	Gather Media contacts from local Media Chairs	Update media contacts	1st Q	9/30/22	
	Submit Press Releases to Media	awards for state board and awards	1st Q	9/30/22	
			2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
	Submit Op Ed Pieces to the Media	op-eds	1st Q	9/30/22	
			2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
	Increase Social Media presence	goal: weekly posts with industry content, photos from meetings	1st Q	9/30/22	
			2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
	Present Working With The Media presentation at the Strategic Planning Meet	Present Working With The Media presentation at Leadership Training	1st Q	9/30/22	
	Submit National Media Award	Send award requirements to Awards Chair as they are received.	3rd Q	3/31/23	
TAHU Enews	Keep membership informed of state chapter activities	Distribute Enews bi-monthly to include information regarding chapter	1st Q	9/30/22	
	on a regular basis.	activities.	2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
		Update format and look to include Hot links to FB, etc.	1st Q	9/30/22	
Newsletter	Keep the membership informed on association activities	Have electronic issues published on time each quarter.	1st Q	9/30/22	
	with articles to enhance knowledge and member	(Per issue requirements and due dates will be distributed to Chapter	2nd Q	12/31/22	
	development.	Presidents and TAHU Board by August 1, 2022)	3rd Q	3/31/23	
			4th Q	6/30/23	
Technology	Improve the traffic to the TAHU website and win the NAHU website award	Work with awards chair	1st Q	9/30/22	
			2nd Q	12/31/22	
Technology	Review and update the website		2nd Q	12/31/22	

SysOp	Keep communication channels open and current	Update state and chapter board rosters	1st Q	7/15/22	
EC President Elect					
Convention	Achieve or exceed budgeted attendance and sponsorship goals	Develop an appealing and catchy theme	1st Q	9/30/22	
		Identify important topics of interests for brokers/members by survey	1st Q	9/30/22	
		What is their main focus and concerns as well as target population			
		Save the date in Enews & TAHU News	1st Q	12/31/22	
		Save the date to potential exhibitors & sponsors that includes an offer to	1st Q	9/30/22	
		sponsor the same event.			
		Build agenda with dynamic speakers focused around the needs identified	1st Q	9/30/22	
		by brokers/members and driving increased attendance	2nd Q	12/31/22	
		Expand list of exhibitors and sponsors	1st Q	9/30/22	
		Actively market to exhibitors & sponsors	2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
		Engage local chapter's participation and increase marketing emails to each	2nd Q	12/31/22	
		chapter.	3rd Q	3/31/23	
			4th Q	6/30/23	
		Actively market to other associations and trade industries - Build List of Contacts	2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
		Marketing through social media	2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
		Expand list of attendees to include non-members	1st Q	9/30/22	
		Thank you to Exhibtors/Sponsors - Discuss commitment for next year	4th Q	6/30/23	
		Host a Vanguard event at the conference	4th Q	6/30/22	
Chapter Presidents	Promote 100% TAHUPAC participation by local board members	Include on every board meeting agenda for discussion	1st Q	9/30/22	
			2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
	Promote 100% HUPAC participation by local board members	Include on every board meeting agenda for discussion	1st Q	9/30/22	
			2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
	Promote 100% Day at the Capitol and Convention attendance by local board r	Include on every board meeting agenda for discussion	1st Q	9/30/22	
			2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	
	Promote Triple Crown and LPRT		1st Q	9/30/22	

			2nd Q	12/31/22	
			3rd Q	3/31/23	
			4th Q	6/30/23	