2026-27 NABIP-TX Strategic Plan

Mission Statement:

The mission of the National Association of Benefits and Insurance Professionals, Texas Chapter 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	Complete?
EC Immed Past Pres	Texas Honorees Corporation	Emphasize importance of all opportunities for contributions at BOD meeti	1st Q	9/30/26	
		conference calls and NABIP-TX Events	2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
	Continue Governance committee to review Bylaws and P&Ps	Monitor all NABIP-TX P&P's/Sunset review and ensure they are current a	1st Q	9/30/26	
			2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
	Approve Bylaws	Bring revised back to board and have membership meeting to approve	1st Q	9/30/26	
	Promote LPRT program and achieve blue ribbon status & Gold Certication-Pinnacle Producers Club (PPC) as of Jan 1 2027	Educate the chapters on the program by promoting through blast emails a	1st Q	9/30/26	
		working with them in gathering information necessary to achieve blue	2nd Q	12/31/26	
		ribbon status.	3rd Q	3/31/27	
			4th Q	6/30/27	
EC Secretary					
Membership Growth	Maintain positive growth each quarter and increase retention		1st Q	9/30/26	
			2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
	Increase Awareness and Share Best Practices	Monthly chapter calls with Chapter Presidents, Membership/Retention Ch	1st Q	9/30/26	
			2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
		Provide NABIP membership powerpoint presentation for local chapters to	1st Q	9/30/26	
		during luncheons and events			
		Distribute prospective new member packet (NABIP Packet)	2nd Q	12/31/26	
	Monthly Outreach	Monthly Chapter eMail with Membership Results/Updates/Reminders	1st Q	9/30/26	
			2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
	Membership Recruitment-Landmark Award	Hold a membership blitz	1st Q	9/30/26	
			2nd Q	12/31/26	
			3rd Q	3/31/27	
	Membership Campaign-Landmark Award	100% Board recruitment contest	1st Q	9/30/26	
			2nd Q	12/31/26	
			3rd Q	3/31/27	

	Membership Campaign-Landmark Award	Ongoing membership campaign lasting 3-6 months roadshow	1st Q	9/30/26	
			2nd Q	12/31/26	
			3rd Q	3/31/27	
	Landmark Award Documentation	Call minutes and attendance template-Send to Awards Chair	2nd Q	12/31/26	
Membership	Increase retention rate to 85%		1st Q	9/30/26	
Retention			2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
	Equip Membership/Retention Chairs	eCommerce Training	1st Q	9/30/26	7/10/26
		Monthly Email Reminders to Local Membership/Retention Chairs to pull	1st Q	9/30/26	
		the new member report/lapse report/billed not paid	2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
Chapter Liaison	Reach out to Chapter Presidents in advance of EC visits to	Determine if chapters need assistance with marketing efforts and	1st Q	9/30/26	
	see how their marketing of the membership meetings is going	membership recruitment to concide with their events	2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
	DEI Marketing piece	translate pieces to spanish for the website	2nd Q	12/31/26	
	Value of Membership Education roadshow	Schedule monthly conference calls to discuss issues, hold webinars and	1st Q	9/30/26	
		at luncheons and special events	2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
Medicare Chair	Zoom Call TBD				
	Medicare Track at Convention		4th Q	4/1/27	
EC Treasurer					
Professional	Educate chapter PD chairs on development process in providing dynamic	Prepare and Distribute Potential Speaker list to all PD Chairs	1st Q	9/30/26	
Development	presentations				
		Schedule initial and monthly PD Calls	1st Q	9/30/26	7/1/26
		Meet with PD chairs and develop scheduling plan of action	1st Q	9/30/26	
		Provide training for Virtual CE sessions for PD Chairs	1st Q	9/30/26	
			2nd Q	12/31/26	
	Include in at least 3 news / communications - Certifications, etc.		3rd Q	3/31/27	7/1/26
			4th Q	6/30/27	
Awards	Apply for NABIP Awards	Communicate award criteria and timeline with board chairs - Landmark,	1st Q	9/30/26	
		Presidential Citation, Media Relations, Legislative Excellence, Website	2nd Q	12/31/26	
			3rd Q	3/31/27	
	Continue online submissions	Continue process for NABIP-TX chapter submissions	1st Q	9/30/26	
	Dropboxes to open at the beginning of the year at Leadership training		3rd Q	12/31/26	
			4th Q	3/31/27	
	Conduct quarterly meetings with local awards chairs	Quarterly meetings for dropbox training	1st Q	9/30/26	
	Deadline for submission of NABIP-TX awards remains February 25		2nd Q	12/31/26	
			3rd Q	3/31/27	

			4th Q	6/30/27	
	Website & Guidebook	Update Guidebook & Website	2nd Q	12/31/26	
	Chapter Certification- Ongoing per chapter				
Vanguard	Provide communication and support for chapter goals	provide specific initiatives for chapter levels	1st Q	9/30/26	
		succession planning	2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
		Host a Vanguard event during the year	1st Q	9/30/26	
			2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
		work with colleges with insurance/risk management	1st Q	9/30/26	
			2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
LPRT	Promote Leading Producers Roundtable/ Pinnacle Producer Circle	4 times a year	1st Q	9/30/26	
			2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
EC 2nd VP					
Legislation	Keep membership informed on all association, state and	Have a Legislative Day focused on industry legislative and	3rd Q	3/31/27	
	federal legislative activities.	regulatory developments			
		Proactive communications with respect to major state or federal issues	1st Q	9/30/26	
			2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
		Hold Monthly Teleconferences with the Legislative Council	1st Q	9/30/26	
			2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
		Hold Monthly Legislative Teleconferences with the Legislative Council an	1st Q	9/30/26	
		Local Chapter Legislative Chairs and Chapter Representatives (weekly as we get closer)	2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
		Develop 2 legislative press releases/ OpEd by 4th quarter	4th Q	6/30/27	
	Enhance Legislative Liaison Program	100% of assignment to targeted legislators	4th Q	6/30/27	
	your local chap reps to deliver checks in your area- need to partner with the state to identify those individuals since you know best who is in your area	key contacts day for local chapters- Emphasis on this at Leg activities & e	1st or 3rd		
	Industry Relations	8 meetings by the 4th quarter	4th Q	6/30/27	
		3 industry partner events attended	4th Q	6/30/27	
	Increase member participation in NABIP-PAC and NABIP-TX PAC	100% of State and Local Board participation	1st Q	9/30/26	
			2nd Q	12/31/26	

			3rd Q	3/31/27	
			4th Q	6/30/27	
		Top 3 NABIP-TX PAC Contributor Recognition	3rd Q	3/31/27	
	Legislative Article in NABIP-TX magazine	One per issue of the magazine	1st Q	9/30/26	
			2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
EC 1st VP					
Communications	Actively engage with Chapter Representatives for Press Release to local media	Hold quarterly conference calls	1st Q	9/30/26	
			2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
	Actively engage with Chapter Representatives for Op Ed pieces to locall media	Hold quarterly conference calls	1st Q	9/30/26	
			2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
	Gather Media contacts from local Media Chairs	Update media contacts	1st Q	9/30/26	
	Submit Press Releases for awards purposes to Online Media/Social Media	awards for state board and awards	1st Q	9/30/26	
			2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
	Submit Op Ed Pieces to the Media	op-eds	1st Q	9/30/26	
			2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
	Present 'Working With The Media' presentation at the Strategic Planning Meeting	Present 'Working With The Media' presentation at chapter meeting	1st Q	9/30/26	
	Win National Media Award	Send award requirements to Awards Chair as they are received.	3rd Q	3/31/27	
NABIP-TX Enews	Keep membership informed of state chapter activities	Distribute Enews monthly to include information regarding chapter 'bragging' & events- due by first of every month	1st Q	9/30/26	
	on a regular basis.		2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
		Update format and look to include Hot links to FB, etc.	1st Q	9/30/26	
Magazine	Keep the membership informed on association activities	Have electronic issues published on time each quarter.	1st Q	9/30/26	
	with articles to enhance knowledge and member	(Per issue requirements and due dates will be distributed to Chapter	2nd Q	12/31/26	
	development.	Presidents and NABIP-TX Board by August 1, 2026)	3rd Q	3/31/27	
			4th Q	6/30/27	
	EC articles for communication	2 articles in publications to memebrs	4th Q	6/30/27	
Technology	Improve the traffic to the NABIP-TX website and win the NABIP website award	Work with awards chair	1st Q	9/30/26	

		Provide Spanish translation and other ADA capabilities to site	2nd Q	12/31/26	
	Review and update the website		2nd Q	12/31/26	
	Increase Social Media presence	goal: weekly posts with industry content, photos from meetings, new member highlights, medicare news	1st Q	9/30/26	
			2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
SysOp	Keep communication channels open and current	Update state and chapter board rosters	1st Q	9/30/26	7/15/26
		Review proper and improper use of distribution lists	1st Q	9/30/26	
EC President Elect					
Convention	Achieve or exceed budgeted attendance and sponsorship goals	Develop an appealing and catchy theme	1st Q	9/30/26	
		Identify important topics of interests for brokers/members by survey	1st Q	9/30/26	
		What is their main focus and concerns as well as target population			
		Save the date in Enews & NABIP-TX Magazine	1st Q	12/31/26	
		Save the date to potential exhibitors & sponsors that includes an offer to	1st Q	9/30/26	
		sponsor the same event.			
		Build agenda with dynamic speakers focused around the needs identified	1st Q	9/30/26	
		by brokers/members and driving increased attendance	2nd Q	12/31/26	
		Expand list of exhibitors and sponsors	1st Q	9/30/26	
		Actively market to exhibitors & sponsors	2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
		Engage local chapter's participation and increase marketing emails to eac	2nd Q	12/31/26	
		chapter.	3rd Q	3/31/27	
			4th Q	6/30/27	
		Actively market to other associations and trade industries - Build List of Contacts	2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
		Marketing through social media	2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
		Expand list of attendees to include non-members	1st Q	9/30/26	
		Thank you to Exhibtors/Sponsors - Discuss commitment for next year	4th Q	6/30/27	
		Host a Welcome reception event at the conference	4th Q	6/30/27	
Chapter Presidents	Promote 100% **NABIP-TX** PAC participation by local board members	Include on every board meeting agenda for discussion	1st Q	9/30/26	
			2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	

	Promote 100% **NABIP** PAC participation by local board members	Include on every board meeting agenda for discussion	1st Q	9/30/26	
			2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
	Promote 100% Convention attendance by local board members	Include on every board meeting agenda for discussion	1st Q	9/30/26	
			2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	
	Promote Triple Crown and Pinnacle Producer Circle (PPC)		1st Q	9/30/26	
			2nd Q	12/31/26	
			3rd Q	3/31/27	
			4th Q	6/30/27	