2016-2017 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		1st Q	9/30/16	No	
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
	Increase Awareness and Share Best Practices	Monthly calls with Chapter Presidents, Membership/Retention Chairs and Board Member over Membership	1st Q	9/30/16	9/30/16	
			2nd Q	12/31/17		
			3rd Q	3/31/17		
			4th Q	6/30/17		
	Equip Membership/Membership Retention Chairs	Provide Electronic Copies of Membership Materials	1st Q	9/1/16	9/1/16	
		eCommerce Training	1st Q	9/30/16	8/23/2016	
	Distribute Recruitment materials	Distribute TAHU Electronic Prospect Packet	1st Q	9/1/2016	9/1/2016	
	Membership Recruitment - Landmark Award	Hold a membership blitz	1st Q	9/30/16	9/30/2016	email sent 10-19-16
			3rd Q	3/31/17		
	Monthly Outreach	Monthly Chapter eMail with Membership Results/Updates/Reminders	1st Q	9/30/16	9/30/16	
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
	Membership Drive - Landmark Award	100% Board Recruitment Contest		9/30/16	10/19/2016	
	Membership Drive - Landmark Award	Ongoing Membership Campaign lasting 3 - 6 months - 9/1 - 11/30	1st Q	9/30/16	Ongoining	email 10-19-16
			2nd Q	12/31/16		
			3rd Q	3/31/17		
Membership Retention	Maintain retention rate of 85%	Send out lapse list monthly to all chapters with spreadsheet	1st Q	9/30/16	9/30/2016	currently at 79%
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/16		
Awards	Apply for NAHU Awards	Communicate award criteria and timeline with chapters - Landmark and Presidential Citation, Media Relations, Legislative Excellence, Website	1st Q	9/30/16	9/30/2016	
			2nd Q	12/31/16		
			3rd Q	3/31/17		
	Apply for NAHU Individual Awards	Identify 1-2 candidates for the NAHU Distinguished Service Award and assist local chapters in submitting awards criteria and application	3rd Q	3/31/17		
		Identify a NAHU Emerging Leader Candidate and assist local chapter in submitting awards criteria and application	3rd Q	3/31/17		
	Add State Award Criteria links to website	Identify items needed for state awards and have documents or links posted to the website	1st Q	9/30/16	9/30/2016	
			2nd Q	12/31/16		
			3rd Q	3/31/17		
Marketing	Obtain a sponsor for 2nd quarterly board meeting	Development of sales approach to potential sponsors	1st Q	9/30/16	9/30/2016	
	Assist convention committee with obtaining sponsors	Development of sales approach to potential sponsors	1st Q	9/30/16	9/30/2016	
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	5/1/17		
Professional Development	Conduct new instructor certification webinar for the revised TAHU Ethics CE		1st Q	9/30/16	N/A	to be scheduled Nov. 1
	Audit SGS designation course for those who need to renew	Send out information to the chairs for new and renewal designation	2nd Q	12/31/16	Ongoing	

	Increase the SGS designation holders by 10%		4th Q	6/30/16	ongoing	
	Hold quarterly conference calls		1st Q	9/30/16	9/30/2016	8-3, 8-24, sept 28
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
		Review of courses due to expire and contact the instructor on whether to renew or develop a new course	1st Q	9/30/16	9/30/2016	(handled by Exec. Dir.)
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/16		
Media	Actively engage members through NAHU resources		1st Q	9/30/16	9/30/2016	
			2nd Q	12/30/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
	Inform and update responsibilities with state media chairs	Hold conference calls	1st Q	9/30/16	9/30/2016	
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
	6 press releases through Texas Press Association		4 th Q	6/30/17	ongoing	
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	9/30/16	9/30/16	
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
		Receive articles and pictures from at least chapters	1st Q	9/30/16	9/30/16	
			2nd Q	13/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
TAHU Enews	Keep membership informed of state chapter activities on a regular basis.	Distribute Enews quarterly to include information regarding chapter activities. Update format and look to include Hot links to FB, etc.	1st Q	9/30/16	9/30/16	
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
Convention	Achieve or exceed budgeted attendance	Develop an appealing and catchy theme	1st Q	9/30/16	9/30/2016	
		Save the date in Enews & TAHU News	1st Q	9/30/16	9/30/2016	
			2nd Q	12/31/15		
			3rd Q	3/31/16		
		Save the date to potential exhibitors & sponsors	2nd Q	12/31/15		
		Actively market to exhibitors & sponsors	2nd Q	12/31/16		
			3rd Q	3/31/16		
		Engage local chapter's participation	1st Q	9/30/16	9/30/2016	
			2nd Q	12/31/17		
			3rd Q	3/31/17		
		Actively market to other association	2nd Q	12/31/16		
			3rd Q	3/31/17		
		Marketing emails to each chapter	2nd Q	12/31/16		
			3rd Q	3/31/16		
		Marketing through social media	2nd Q	12/31/16		
			3rd Q	3/31/17		
Legislation	Keep membership informed on all association, state and federal legislative activities.	Have a Legislative Day on 1/17/17 focused on industry happenings	3rd Q	3/31/17	ongoing	

		Productive communications with respect to major federal issues (minimum of 3 over next 12 months)	1st Q	9/30/16	9/30/16	
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
		Hold Monthly Teleconferences with the Legislative Council (2nd Wednesday at 9am)	1st Q	9/30/16	9/30/2016	
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
		Hold Monthly Legislative Teleconferences with the Legislative Council and Local Chapter Legislative Chairs and Chapter Presidents (3rd Wednesday at 8:30am)	1st Q	9/30/16	9/30/2016	
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
		Disbribute a minimum of 3 Operation Shouts at the TAHU Level	1st Q	9/30/16	ongoing	
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
		Distribute the Postcards From the Lege (minimum of 3 by 4th Qtr.)	4th Q	6/30/17	Ongoing	
	Confirm participation with Key Contacts	Provide role description and confirm future participation	1st Q	9/30/16	9/30/2016	
	Increase TAHUPAC contributions	25% growth to $32,000	1st Q	9/30/16	9/30/2016	
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
		Exceed goal of $12,500 to the Legislative Fund	1st Q	9/30/16	9/30/2016	
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
	Increase member participation in HUPAC and TAHUPAC	20% for HUPAC and 81% for TAHUPAC for Landmark Award	1st Q	9/30/16	9/30/2016	
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
		Integrate and streamline process to contribute to both HUPAC and TAHUPAC simultaneously	1st Q	9/30/16	9/30/2016	
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
		Top 3 TAHUPAC Contributor Recognition	4th Q	6/30/17		
	Legislative Article in TAHU magazine	One per issue of the magazine	1st Q	9/30/16	9/30/16	
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
		Establish video explaining TAHUPAC/HUPAC, drilling into the difference between the Legislative Fund and the PAC	2nd Q	12/31/16	Ongoing	
		Top 3 TAHUPAC Contributor Recognition	4th Q	6/30/17		
	Industry Relations	Enhance Industry Relations and provide at least 3 communications on this topic	1st Q	9/30/16	9/30/2016	
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
	Provide for Legislative Scholarship support TAHU" Goes to College (Vanguard Council) Recipient		1st Q	9/30/16		
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
Chapter Presidents	Hold a symposium and include sponsors outside of our industry	Industries such as cell phone companies, office supply companies, etc.	4th Q	6/30/17		
	Hold a Mentoring Meeting for new people entering		4th Q	6/30/17		

	the industry or encourage a Vanguard membership					
	Hold a Community Education week	Town hall type meeting educating about individual health insurance, Medicaid and CHIP	4th Q	6/30/17		
	Awards documentation updated at quarterly board meetings	To help stay on top of collecting information needed for awards	2nd Q	12/31/17		
			3rd Q	3/31/17		
SysOp		State and chapter board rosters updated	1st Q	9/30/16	9/30/16	
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	9/30/16	9/30/2016	
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/3-/17		
Chapter Support	Continue to lend support to the new South Texas AHU Chapter		1st Q	9/30/16	9/30/2016	
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
	Reach out to each Texas Chapter	Ask what their challenges are and how they might be best served	1st Q	9/30/16	ongoing	
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
	Work with West Texas, El Paso, San Angelo and Heart of Texas	Re-charge with a membership recruitment activity with CE and sponsorships to cover the cost (medicare brokers/financial planners)	2nd Q	12/31/16	ongoing	
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	9/30/16	9/30/2016	
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
	P&P Sunset Review	Monitor all TAHU P&Ps	1st Q	9/30/16	9/30/2016	
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		