

2017-2018 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	9/30/17		
			2nd Q	12/31/17		
			3rd Q	3/31/18		
			4th Q	6/30/18		
	Increase Awareness and Share Best Practices	Monthly calls with Chapter Presidents, Membership/Retention Chairs	1st Q	9/30/17		
			2nd Q	12/31/17		
			3rd Q	3/31/18		
			4th Q	6/30/18		
	Set up Conference Call with each Chapter Boards to to over Membership/Membership Retention goals/needs etc.					
	Testimonies to be used on Chapter Newsletters, Luncheon slides websites, Social Media, based on NAHU's Are you "IN"?, the TAHU version, Are You "IT"? (in TAHU)					
	Provide Slide Templates to Local Chapters to use during luncheons/events					
	Disbribute New Member Packet Template					
	Equip Membership/Membership Retention Chairs	Provide Electronic Copies of Membership/Retention Materials	1st Q	9/1/17		
	Distribute Recruitment materials	Distribute TAHU Electronic Prospect Packet	1st Q	9/1/2017		
	Membership Recruitment - Landmark Award	Hold a membership blitz	1st Q	9/30/17		
			3rd Q	3/31/18		
	Monthly Outreach	Monthly Chapter eMail with Membership Results/Updates/Reminders	1st Q	9/30/17		
			2nd Q	12/31/17		
			3rd Q	3/31/18		
			4th Q	6/30/18		
Membership Drive - Landmark Award	100% Board Recruitment Contest					
Membership Drive - Landmark Award	Ongoing Membership Campaign lasting 3 - 6 months - 9/1 - 11/30	1st Q	9/30/17			
		2nd Q	12/31/17			
		3rd Q	3/31/18			
Membership Retention	Increase retention rate to 85%		1st Q	9/30/17		
			2nd Q	12/31/17		
			3rd Q	3/31/18		
			4th Q	6/30/18		
	Equip Membership/Retention Chairs	eCommerce Training	1st Q			
		Monthly Email Reminders to Local Membership/Retention Chairs to pull the new member report/lapse report/billed not paid	Monthly			
		"Idea a Month" Email to Local Chairs	Monthly			
Awards	Apply for NAHU Awards	Communicate award criteria and timeline with chapters - Landmark, Presidential Citation, Media Relations, Legislative Excellence, Website	1st Q	9/30/17		
			2nd Q	12/31/17		
			3rd Q	3/31/18		
	Update Awards Guidebook		4th Q	6/30/18		
	Transition to one chapter awards submission for TAHU Awards		2nd Q	12/31/17		

Marketing	Secure luncheon sponsors for October and January meetings		2nd Q	9/30/17	
			3rd Q	1/31/18	
	Assist convention committee with obtaining sponsors		1st Q	9/30/17	
			2nd Q	12/31/17	
			3rd Q	3/31/18	
			4th Q	5/1/18	
	Electronic Membership Directory				
Professional Development	Prepare and Disribute Potential Speaker list to all PD Chairs		1st Q		
	Schedule initial and monthly PD Calls		1st Q		
	Meet with PD chairs and develop scheduling plan of action				
	SGS Speaker Certification - review needs and provide plan of action				
	SGS - Conduct needs assessment for potential updates to course				
	SGS - Present plan of action to BOD for any updates that may be needed				
	SGS - audit lists and update as needed				
Media	Actively engage members through NAHU resources		1st Q	9/30/17	
			2nd Q	12/30/17	
			3rd Q	3/31/18	
			4th Q	6/30/18	
	Inform and update responsibilities with state media chairs	Hold conference calls	1st Q	9/30/17	
			2nd Q	12/31/17	
			3rd Q	3/31/18	
			4th Q	6/30/18	
	6 press releases through Texas Press Association	work with legislative team to craft communications	4 th Q	6/30/17	
Newsletter	Keep the membership informed on association activities with articles to enhance knowledge and member development.	Keep magazine at 32 pages per contract; adhere to strict deadlines for receipt of articles and pictures from all chapters	1st Q	9/30/17	
			2nd Q	12/31/17	
			3rd Q	3/31/18	
			4th Q	6/30/18	
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	9/30/17	
			2nd Q	12/31/17	
			3rd Q	3/31/18	
			4th Q	6/30/18	
Technology	Improve the traffic to the TAHU website and win the NAHU website award	Improve the content on the website and keep it current. Switch to Star Chapter Platform	1st Q	9/30/17	
Convention	Achieve or exceed budgeted attendance	Develop an appealing and catchy theme	1st Q	9/30/17	
		Identify important topics of interests for brokers/members. What is their main focus and concerns as well as target population	1st Q	9/30/17	
		Save the date in Enews & TAHU News	1st Q	9/30/17	
			2nd Q	12/31/17	
			3rd Q	3/31/18	
		Save the date to potential exhibitors & sponsors	2nd Q	12/31/18	
		Build agenda with dynamic speakers focused around the needs identified by brokers/members	2nd Q	12/31/17	
			3rd Q	3/31/18	
		Actively market to exhibitors & sponsors	2nd Q	12/31/17	
			3rd Q	3/31/18	

		Possibly update agenda to better meet the needs of the attendees and drive increased active attendance	2nd Q	12/31/18		
		Engage local chapter's participation	1st Q	9/30/17		
			2nd Q	12/31/17		
			3rd Q	3/31/18		
		Actively market to other association	2nd Q	12/31/17		
			3rd Q	3/31/18		
		Marketing emails to each chapter	2nd Q	12/31/17		
			3rd Q	3/31/18		
		Marketing through social media	2nd Q	12/31/17		
			3rd Q	3/31/18		
Legislation	Keep membership informed on all association, state and federal legislative activities.	Have a Legislative Day on 1/24/18 focused on industry legislative and regulatory developments	3rd Q	3/31/18		
		Proactive communications with respect to major state or federal issues (minimum of 3 over next 12 months)	1st Q	9/30/17		
			2nd Q	12/31/17		
			3rd Q	3/31/18		
			4th Q	6/30/18		
		Hold Bi-Monthly Teleconferences with the Legislative Council (2nd Tuesday at 9am)	1st Q	9/30/17		
			2nd Q	12/31/17		
			3rd Q	3/31/18		
			4th Q	6/30/18		
		Hold Monthly Legislative Teleconferences with the Legislative Council and Local Chapter Legislative Chairs and Chapter Presidents (4th Tuesday at 9am)	1st Q	9/30/17		
			2nd Q	12/31/17		
			3rd Q	3/31/18		
			4th Q	6/30/18		
		Develop 2 legislative press releases by 4th quarter	4th Q	6/30/18		
	Develop Robust Key Contacts Program	Provide role description and confirm future participation	1st Q	9/30/17		
	Increase TAHUPAC contributions	25% growth to \$32,000 to TAHUPAC	1st Q	9/30/17		
			2nd Q	12/31/17		
			3rd Q	3/31/18		
	Increase member participation in HUPAC and TAHUPAC	21% for HUPAC and 81% for TAHUPAC for Landmark Award	1st Q	9/30/17		
			2nd Q	12/31/17		
			3rd Q	3/31/18		
			4th Q	6/30/18		
		Integrate and streamline process to contribute to both HUPAC and TAHUPAC simultaneously	1st Q	9/30/17		
			2nd Q	12/31/17		
			3rd Q	3/31/18		
			4th Q	6/30/18		
		Top 3 TAHUPAC Contributor Recognition	4th Q	6/30/18		
	Legislative Article in TAHU magazine	One per issue of the magazine	1st Q	9/30/17		
			2nd Q	12/31/17		
			3rd Q	3/31/18		
			4th Q	6/30/18		
		Top 3 TAHUPAC Contributor Recognition	4th Q	6/30/17		
	Provide for Legislative Scholarship support					
	TAHU" Goes to College (Vanguard Council) Recipient		1st Q	9/30/17		

			2nd Q	12/31/17		
			3rd Q	3/31/18		
			4th Q	6/30/18		
Chapter Presidents	Hold a symposium and include sponsors outside of our industry	Industries such as cell phone companies, office supply companies, etc.	4th Q	6/30/18		
	Hold a Mentoring Meeting for new people entering the industry or encourage a Vanguard membership		4th Q	6/30/18		
	Hold a Community Education week	Town hall type meeting educating about individual health insurance, Medicaid and CHIP	4th Q	6/30/18		
	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	9/30/17		
Chapter Support	Reach out to Chapter Presidents in advance of EC visits to see how their marketing of the luncheon is going	Determine if chapters need assistance with marketing efforts and membership recruitment to coincide with their events	1st Q	9/30/17		
			2nd Q	12/31/17		
			3rd Q	3/31/18		
			4th Q	6/30/18		
	Work with West Texas, El Paso, San Angelo and Heart of Texas	Schedule conference calls to discuss issues and create a strategic plan to pursue additional members and have CE at each luncheon	1st Q	9/30/17		
Immed Past Pres	TAHU Honorees Corporation	Emphasize importance of all opportunities for contributions at BOD meetings conference calls and TAHU Events; assign a sister chapter to lend support	1st Q	9/30/17		
			2nd Q	12/31/17		
			3rd Q	3/31/18		
			4th Q	6/30/18		
	P&P Sunset Review	Monitor all TAHU P&Ps	1st Q	9/30/17		
			2nd Q	12/31/17		
			3rd Q	3/31/18		
			4th Q	6/30/18		
	Elections	Serve as chairman of the TAHU election process	2nd Q	12/31/17		
			3rd Q	3/31/18		