

2012-2013 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	Hold a membership blitz	2nd Qtr	10/19/12	
		Short range contests	1st Q	9/30/12	
			2nd Q	12/31/12	
			3rd Q	3/31/13	
			4th Q	6/30/13	
		Identify non-renewals by role-Producer, Non-Producer, GA, Carrier Rep and reasons noted	1st Q	9/30/12	
			2nd Q	12/31/12	
			3rd Q	3/31/13	
			4th Q	6/30/13	
		Attend Region VI Membership Training Workshops	1st Q	08/3-4/12	
		Follow award criteria - keep up throughout the year	1st Q	9/30/12	
			2nd Q	12/31/12	
			3rd Q	3/31/13	
			4th Q	6/30/13	
	Maintain retention rate at 80%	Make phone calls to all members on lapsing lists on a quarterly basis.	By 3rd Qtr	3/31/13	
		Development of a membership packet	1st Q	9/30/12	
Marketing	Obtain a sponsor for each 3rd and 4th quarterly board meeting and major association events.	Development of sales approach to potential sponsors	3rd Q	1/23/13	
			4th Q	5/4/13	
	Focus on marketing of the SGS Designation	Campaign	3rd Q	1/23/13	
	Increase awareness of website capabilities	Campaign and website sponsors	2nd Q	10/19/12	
	Increase awareness of value of TAHU membership	Develop a marketing piece on the value and benefits of TAHU membership to include legislative accomplishments and professional development activities.	3rd Q	1/23/13	
		Update the current marketing brochure	2nd Q	10/19/12	
Awards	Apply for NAHU awards (Landmark, Pres Citation, DSA, Osler, Spirit of Freedom, Lege, Others as Necessary)	Communicate award criteria and timeline with chapters	1st Q	8/31/12	
			2nd Q	10/19/12	
			3rd Q	1/23/13	
			4th Q	5/4/13	
		Hold awards meeting at Region VI Meeting	1st Q	08/3-4/12	
		Top 3 TAHUPAC Contributor Awards	4th Q	5/3/13	
	Improve professional development activities for members and the ability for them to obtain various designations, etc.	All Chapters to submit timely reports	1st Q	7/13/12	
			2nd Q	10/19/12	
			3rd Q	1/23/13	
			4th Q	5/4/13	
		Update CE presentations and grow the speaker list	1st Q	7/13/12	
			2nd Q	10/19/12	
			3rd Q	1/23/13	
			4th Q	5/4/13	
		Publish an article regarding the Counselor's License- pending TDI final	1st Q	7/13/12	

		rules	2nd Q	10/19/12		
			3rd Q	1/23/13		
			4th Q	5/4/13		
		50% of the agents who take the TAHU courses will apply for the SGS Designation	1st Q	7/13/12		
			2nd Q	10/19/12		
			3rd Q	1/23/13		
			4th Q	5/4/13		
		Hold quarterly conference calls/personal contact (other than email) w/6 chapter chairs	1st Q	7/13/12		
			2nd Q	10/19/12		
			3rd Q	1/23/13		
			4th Q	5/4/13		
		Build a CE committee	2nd Q	10/19/12		
		Develop SGS Certificate for designation holders	2nd Q	10/19/12		
Media	Maximize media awareness and the value of the agent	Engage with 10 of the 14 chapter media chairs	2nd Q	10/19/12		
		Publish two letters to the editor	3rd Q	1/23/13		
		Publish one op-ed each month	1st Q	7/13/12		
			2nd Q	10/19/12		
			3rd Q	1/23/13		
			4th Q	5/4/13		
		Email to the chapter presidents and chapter media chairs each month	1st Q	7/13/12		
			2nd Q	10/19/12		
			3rd Q	1/23/13		
			4th Q	5/4/13		
		Continue to fill media holes and do interviews, etc.	1st Q	7/13/12		
			2nd Q	10/19/12		
			3rd Q	1/23/13		
			4th Q	5/4/13		
		Refresh contact list of experts	1st Q	7/13/12		
			2nd Q	10/19/12		
			3rd Q	1/23/13		
			4th Q	5/4/13		
Newsletter	Keep the membership informed on association activities with articles to enhance knowledge and member development.	Have less non-articles (Enews can be outlet for this)	1st Q	7/13/12		
			2nd Q	10/19/12		
			3rd Q	1/23/13		
			4th Q	5/4/13		
		Keep magazine at 32 pages per contract	1st Q	7/13/12		
			2nd Q	10/19/12		
			3rd Q	1/23/13		
			4th Q	5/4/13		
		Improve the artistry in the magazine	1st Q	7/13/12		
			2nd Q	10/19/12		
			3rd Q	1/23/13		
			4th Q	5/4/13		
		Receive articles and pictures from at least 10 of 14 chapters	1st Q	7/13/12		
			2nd Q	10/19/12		
			3rd Q	1/23/13		
			4th Q	5/4/13		
TAHU Enews	Keep membership informed of state chapter activities on a regular basis.	Enews (1 per month) (Use it for the non-articles)	1st Q	7/13/12		
			2nd Q	10/19/12		
			3rd Q	1/23/13		
			4th Q	5/4/13		

Convention	Improve attendance.	Develop a catchy theme going down memory lane	1st Q	8/1/12		
		Thanks and save the date email	1st Q	8/15/12		
		Develop a strong agenda to peak attendee interest	2nd Q	11/1/12		
		Marketing piece to each chapter	2nd Q	11/1/12		
		Marketing to former members and/or non-members	2nd Q	11/1/12		
Legislation	Monitor legislative bills in an effort to provide information to the consumer/Promote the consumer and the agent role in the PPACA.	Distribute Bimonthly Postcards from the Ledge Postcards from the Ledge (Bimonthly)	1st Q	8/17/12		
			2nd Q	10/19/12		
			3rd Q	1/23/13		
			4th Q	5/4/13		
	Keep membership informed on all association, state and federal legislative activities.	Have a Day at the Capitol focused on Teaching to Lobby and creating accountability/reporting.	3rd Q	1/22/13		
		Hold Monthly Legislative Teleconferences with the Legislative Council and Local Chapter Legislative Chairs and Chapter Presidents.	1st Q	7/13/12		
			2nd Q	10/19/12		
			3rd Q	1/23/13		
			4th Q	5/4/13		
		Regular TAHUPAC education/participatory programs at the local level.	1st Q	7/13/12		
			2nd Q	10/19/12		
			3rd Q	1/23/13		
			4th Q	5/4/13		
		Identify global positions and obtain board approval	2nd Q	10/19/12		
		Follow award criteria - keep up throughout the year	1st Q	7/13/12		
			2nd Q	10/19/12		
			3rd Q	1/23/13		
			4th Q	5/4/13		
	Increase TAHUPAC/HUPAC contributions.	Positive Growth in TAHUPAC and HUPAC contributors each month with the help of the website promotion.	1st Q	7/13/12		
			2nd Q	10/19/12		
			3rd Q	1/23/13		
			4th Q	5/4/13		
	Identify initiatives that may not necessarily pass through this next legislative session - more long term	Establish work groups to work these initiatives through the legislature.		Ongoing		
Chapter Presidents	Improve membership numbers and attendance at local chapter meetings/functions.	Increase member attendance at monthly meetings	1st Q	7/13/12		
			2nd Q	10/19/12		
			3rd Q	1/23/13		
			4th Q	5/4/13		
		Conduct membership survey	2nd Q	10/19/12		
		Plan a year of programs in advance and distribute to membership	1st Q	7/13/12		
		Use Pacesetter award criteria to set chapter goals	1st Q	7/13/12		
		Increase resources available to members	1st Q	7/13/12		
			2nd Q	10/19/12		
			3rd Q	1/23/13		
			4th Q	5/4/13		
		Increase # of sponsors	1st Q	7/13/12		
			2nd Q	10/19/12		
			3rd Q	1/23/13		
			4th Q	5/4/13		
		Hold New Membership Meetings	1st Q	7/13/12		

			2nd Q	10/19/12			
			3rd Q	1/23/13			
			4th Q	5/4/13			
			Increase participation with coalition partners	1st Q	7/13/12		
				2nd Q	10/19/12		
				3rd Q	1/23/13		
				4th Q	5/4/13		
			Personal phone calls from the chapter president to new members	1st Q	7/13/12		
				2nd Q	10/19/12		
				3rd Q	1/23/13		
				4th Q	5/4/13		
			Actively promote member participation in TAHU state events	1st Q	7/13/12		
				2nd Q	10/19/12		
3rd Q	1/23/13						
4th Q	5/4/13						
Industry Relations							
Improve relations with carriers and other industry players.	Build the 2012-13 Committee; identify objectives; follow up with carriers from prior years; Building in the SGS piece.	2nd Q	10/19/12				
		Hold first meeting with coalition partners	2nd Q	10/19/12			
Public Outreach							
Educate/improve the public perception of what association members do and how the association assists the consumer	Reach out to the chapter presidents for chair representation	1st Q	7/13/12				
	Hold Event with the Community	2nd Q	10/19/12				
	Publish articles for the TAHU News; 2 on CHIP and 2 on Chapter Support	1st Q	7/13/12				
		2nd Q	10/19/12				
		3rd Q	1/23/13				
		4th Q	5/4/13				
SysOp							
	State and chapter board rosters updated		7/1/12				
Technology							
Improve the traffic to the TAHU website and win the NAHU website award	Enhance the look and ease of navigation of the website	2nd Q	10/19/12				
	Improve the content on the website and keep it current	2nd Q	10/19/12				
Chapter Support							
Improve relations with small chapters	Meet with small chapter presidents to discuss obstacles/challenges	2nd Q	10/19/12				
	Partner on CE and Legislative initiatives and dedicate resources to the small chapters	3rd Q	1/23/13				