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 2nd Q	9/30/12 12/31/12		
			2nd Q 3rd Q			
			4th Q			
		Identify non-renewals by role-Producer, Non-Producer, GA, Carrier Rep	1st Q	9/30/12		
		and reasons noted	2nd Q	12/31/12		
			3rd Q 4th Q			
			4th Q	0/30/13		
		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 4th Q	3/31/13 6/30/13		
			401 Q	0/30/13		
	Maintain retention rate at 80%	Make phone calls to all members on lapsing lists on a	By 3rd Qtr	3/31/13		
		quarterly basis.	Í			
		Development of a membership packet	1st Q	9/30/12		
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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		
3			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		
	morease awareness of website capabilities	Ouripaign and website sponsors	Zila Q	10/13/12		
	Increase awareness of value of TAHU membership	Develop a marketing piece on the value and benefits of TAHU	3rd Q	1/23/13		
		membership to include legislative accomplishments and professional				
		development activities.	ļ			
		Update the current marketing brochure	2nd Q	10/19/12		
Awards		opuate the current marketing brochure	ZIIU Q	10/19/12		
	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			
			3rd Q			
			4th Q	5/4/13		
		Hold awards meeting at Region VI Meeting	1st Q	08/3-4/12		
		Tiold awards mostling at region visitoding	101.0	00/0 1/12		
		Top 3 TAHUPAC Contributor Awards	4th Q	5/3/13		
Professional	Improve professional development activities for members and	All Chapters to submit timely reports	1st Q	7/13/12		
Development	the ability for them to obtain various designations, etc.		2nd Q 3rd Q	10/19/12 1/23/13		
			4th Q	5/4/13		
			-1.11 02	5, ,, 10		
		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		
		. az a. arado regarang ne coaración a License penang 101 illia	131 (4)	1710/12		

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		rules	2nd Q			
			3rd Q	1/23/13		
			4th Q	5/4/13		
		50% of the agents who take the TAHU courses will apply for the SGS	1st Q	7/13/12		
		Designation	2nd Q			
			3rd Q			
			4th Q	5/4/13	1	
		Hold quarterly conference calls/personal contact (other than email) w/6	1st Q	7/13/12	1	
		chapter chairs	2nd Q			
			3rd Q		1	
			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	1	
Na P -	Market and Programmer 19 1 29	Francisco (d. 40 of the 44 decreases 2° of 1°	0 10	40/40/40		
Media	Maximize media awareness and the value of the agent	Engage with 10 of the 14 chapter media chairs	2nd Q	10/19/12	1	
		Dublish two letters to the adition	01.0	4/00/40	1	
		Publish two letters to the editor	3rd Q	1/23/13	1	
		Dublish and an ad analy security	4-4-0	7/10/10	1	
		Publish one op-ed each month	1st Q	7/13/12	1	
			2nd Q	10/19/12		
			3rd Q		1	
			4th Q	5/4/13	1	
		Fig. 9.4 at the character and the standard chara	4.10	7/40/40		
		Email to the chapter presidents and chapter media chairs each month	1st Q	7/13/12	1	
			2nd Q			
			3rd Q	1/23/13	1	
			4th Q	5/4/13	1	
		Continue to fill specific below and do interviews at	4-4-0	7/10/10	1	
		Continue to fill media holes and do interviews, etc.	1st Q	7/13/12	1	
			2nd Q		1	
			3rd Q	1/23/13	1	
			4th Q	5/4/13		
		Potroch contact list of experts	104.0	7/13/12	1	
		Refresh contact list of experts	1st Q 2nd Q		1	
			2nd Q 3rd Q		1	
			3ra Q 4th Q		1	
			4111 Q	3/4/13	1	
					1	
Newsletter	Keen the membership informed on accomistion activities	Have less non-articles (Enews can be outlet for this)	1st Q	7/13/12	1	
ivewsietter	Keep the membership informed on association activities	Have less non-articles (Enews can be outlet for this)	2nd Q	10/19/12		
	with articles to enhance knowledge and member development.		2nd Q 3rd Q		1	
	development.		4th Q		1	
			4111 Q	J/4/13	1	
		Keep magazine at 32 pages per contract	1st Q	7/13/12	1	
		neep magazine at oz pages per contidet	2nd Q		+	
			3rd Q		+	
			4th Q		+	
			7111 0	J/7/1J	1	
		Improve the artistry in the magazine	1st Q	7/13/12	+	
		improve the artistry in the magazine		10/19/12	1	
			3rd Q	1/23/13	+	
			4th Q	5/4/13		
			7010	5/-1/15		
		Receive articles and pictures from at least 10 of 14 chapters	1st Q	7/13/12	1	
		1.000110 artiolog and plotatog from at 1600t 10 of 14 offapters	2nd Q	10/19/12	+	
			3rd Q			
			4th Q		+	
			3	S, ., 10	1	
TAHU Enews	Keep membership informed of state chapter activities on	Enews (1 per month) (Use it for the non-articles)	1st Q	7/13/12		
Ellows	a regular basis.	2.13.13 (. por monar) (300 it for the hori didicios)	2nd Q	10/19/12		
	a rogalar baois.		3rd Q			
			4th Q			
			4(I) Q	IJ/ 4 /13	I	

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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	
			4 . 0	0/17/10	
Legislation	Monitor legislative bills in an effort to provide information to the consumer/Promote the consumer and the agent role in	Distribute Bimonthly Postcards from the Ledge	1st Q 2nd Q	8/17/12 10/19/12	
	the PPACA.	Postcards from the Ledge (Bimonthly)	3rd Q	1/23/13	
	1101111011		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	1st Q		
		and Local Chapter Legislative Chairs and Chapter Presidents.	2nd Q	10/19/12	
			3rd Q	1/23/13	
			4th Q	5/4/13	
		Regular TAHUPAC education/participatory programs at the	1st Q	7/13/12	
		local level.	2nd Q	10/19/12	
		local level.	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	1st Q	7/13/12	
		each month with the help of the website promotion.	2nd Q	10/19/12	
			3rd Q	1/23/13	
			4th Q	5/4/13	
	Identify initiatives that may not necessarily pass through	Establish work groups to work these initiatives through the legislature.	-	Ongoing	
	this next legislative session - more long term	Establish work groups to work those initiatives through the logislature.	•	Origoning	
Chapter Preside					
	Improve membership numbers and attendance at local	Increase member attendance at monthly meetings	1st Q		
	chapter meetings/functions.		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	
		morease resources available to members	2nd Q	10/19/12	
			3rd Q		
			4th Q		
		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	
		Hora recent intermotional intermitys	isi Q	1/13/12	L

			2nd Q	10/19/12	
			3rd Q		
			4th Q		
			Turi Q	0/-1/10	
		Increase participation with coalition partners	1st Q	7/13/12	
		increase participation with coalition partiers	2nd Q		
			2nd Q 3rd Q		
			4th Q	5/4/13	
		Personal phone calls from the chapter president to new members	1st Q		
			2nd Q		
			3rd Q	1/23/13	
			4th Q	5/4/13	
			-		
		Actively promote member participation in TAHU state events	1st Q	7/13/12	
		p paraoparon na nata arana	2nd Q		
			3rd Q		
			4th Q		
Industry Deletion			411 Q	3/4/13	
Industry Relation		D. 11.11 - 0040 40 O 11 14 15.	0.10	40/40/40	
	Improve relations with carriers and other industry players.	Build the 2012-13 Committee; identify objectives; follow up	2nd Q	10/19/12	
		with carriers from prior years; Building in the SGS piece.			
		Hold first meeting with coalition partners	2nd Q	10/19/12	
Public Outreach					
	Educate/improve the public perception of what association	Reach out to the chapter presidents for chair representation	1st Q	7/13/12	
	members do and how the association assists the consumer				
		Hold Event with the Community	2nd Q	10/19/12	
		, , , , , , , , , , , , , , , , , , ,			
		Publish articles for the TAHU News; 2 on CHIP and 2 on Chapter	1st Q	7/13/12	
		Support	2nd Q		
		Зирроп	3rd Q		
			4th Q		
			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	Enhance the look and ease of navigation of the website	2nd Q	10/19/12	
	website award				
		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	
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		Partner on CE and Legislative initiatives and dedicate resources to the			
		small chapters	3rd Q	1/23/13	
		oman onaptoro	Jiu Q	1/20/10	