

2013-2014 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	12/1/13	11/15/2013			
			3rd Qtr	5/1/13				
		Short range contests "Free Lunch" Contest Focus on NAHU's Contest Promotion of \$250 for 4 new members Monthly Focus Contests/Feb/Mar Finish Strong Contest! Apr/May/June	Membership Growth/Retention Winners					
				1st Q	9/30/13	10/8/13		
				2nd Q	12/31/13	12/31/2013		
				3rd Q	3/31/14			
				4th Q	6/30/14			
				1st Q	9/30/13	1/17/14		
				2nd Q	12/31/13	1/17/2014		
				3rd Q	3/31/14			
				4th Q	6/30/14			
		Chapter Membership Training-Region VI Meeting	Follow award criteria - keep up throughout the year	1st Q	8/4/13	8/4/13		
				1st Q	9/30/13	9/30/13		
				2nd Q	12/31/13	12/31/2013		
				3rd Q	3/31/14			
		Maintain retention rate at 80%	Triple Crown Contests					
				1st Q	9/30/13	NA		
				2nd Q	12/31/13	1/17/2014		
				3rd Q	3/31/14	1/17/2014		
	4th Q			6/30/14				
	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	3/31/14	1/30/2014		
				4th Q	6/30/14			
		Focus on marketing of the SGS Designation	Campaign	4th Q	6/30/14			
Increase awareness of website capabilities		Campaign and website sponsors	3rd Q	3/31/14				
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.	2nd Q	12/31/13				
Increase awareness of value of SGS Designation	Develop a marketing piece on the value and benefits of SGS Designation	4th Q	5/1/14					
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	9/30/13	NA			
			2nd Q	12/31/13	NA			
			3rd Q	3/31/14	1/1/2014			
			4th Q	6/30/14				
			Hold awards meeting at Region VI Meeting	Identify ability to submit awards online	3rd Q	5/1/14		
			Online award submissions	Top 3 TAHUPAC Contributor Awards	1st Q	9/30/13	1/29/2014	
	4th Q	5/2/14						
	Professional Development	Improve professional development activities for members and the ability for them to obtain various designations, etc.	All Chapters to submit timely reports	1st Q	8/5/13	8/5/2013		
2nd Q				10/18/13	10/18/2013			
3rd Q				1/30/14				
4th Q				4/30/14				
1st Q				8/5/13				

			2nd Q	10/18/13		
			3rd Q	1/30/14		
			4th Q	4/30/14		
		Hold quarterly conference calls/personal contact (other than email) w/ chapter chairs	1st Q	9/30/13	9/30/2013	
			2nd Q	12/31/13	12/31/2013	
			3rd Q	3/31/14		
			4th Q	6/30/14		
		Update the 5 hour SGS Renewal course	3rd Q	1/31/14	12/31/2013	
		Update the 8 hour SGS course	3rd Q	2/5/14		
Media	Increase chapter awareness of press release protocol	Monthly conference calls with chapter media chair and/or president	1st Q	9/30/13	9/30/2013	
			2nd Q	12/31/13	12/31/2013	
			3rd Q	3/31/14		
			4th Q	6/30/14		
	Increase chapter motivation to reach out to local media outlets	Distribute success stories/articles	1st Q	9/30/13	9/30/2013	
			2nd Q	12/31/13	12/31/2013	
			3rd Q	3/31/14		
			4th Q	6/30/14		
		Coordinate with the legislative team	3rd Q	3/31/14		
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	9/15/13	9/30/13	
			2nd Q	12/15/13	12/31/13	
			3rd Q	3/15/14		
			4th Q	6/15/14		
		Keep magazine at 32 pages per contract	1st Q	9/15/13	9/30/13	
			2nd Q	12/15/13	NO	
			3rd Q	3/15/14		
			4th Q	6/15/14		
		Receive articles and pictures from at least 10 of 14 chapters	1st Q	9/15/13	NO	
			2nd Q	12/15/13	NO	
			3rd Q	3/15/14		
			4th Q	6/15/14		
		EC Memorandum	1st Q	7/31/13	7/31/2013	
			2nd Q	10/31/13	10/31/2013	
			3rd Q	1/31/14		
			4th Q	4/30/14		
TAHU Enews	Keep membership informed of state chapter activities on a regular basis.	Enews (1 per quarter)	1st Q	8/31/13	8/31/13	
			2nd Q	11/30/13	11/30/13	
Convention	Improve attendance.	Develop a catchy theme	1st Q	8/1/13	9/30/2013	
		Develop local marketing committee for each chapter	1st Q	8/15/13	9/30/2013	
		Develop a strong agenda to peak attendee interest	2nd Q	11/1/13	1/30/2014	
		Marketing piece to each chapter	2nd Q	11/1/13		
		Marketing to former members and/or non-members	2nd Q	11/1/13		
Legislation	Keep membership informed on all association, state and federal legislative activities.	Have a Legislative Day focused on industry happenings with regard to ACA	3rd Q	1/31/14	1/31/2014	
		Hold Monthly Legislative Teleconferences with the Legislative Council and Local Chapter Legislative Chairs and Chapter Presidents.	1st Q	9/30/13	9/30/2013	
			2nd Q	12/31/13	12/31/2013	

			3rd Q	3/31/14		
			4th Q	6/30/14		
		Regular TAHUPAC education/participatory programs at the local level.	1st Q	9/30/13		
			2nd Q	12/31/13		
			3rd Q	3/31/14		
			4th Q	6/30/14		
		Follow award criteria - keep up throughout the year	1st Q	9/30/13		
			2nd Q	12/31/13		
			3rd Q	3/31/14		
			4th Q	6/30/14		
	Confirm commitment with current Key Contacts	Provide role description and confirm future participation	2nd Q	12/31/13	12/31/2013	
	Identify new Key Contacts for exiting/replacement offices	KC Chair, Lobbyist, Chapter Presidents and Lege Council work together to identify	4th Q	5/31/14		
	Increase TAHUPAC/HUPAC contributions.	20% growth focusing on past contributors as well as new "small ball"	1st Q	9/30/13	NO	
			2nd Q	12/31/13	NO	
			3rd Q	3/31/14		
			4th Q	6/30/14		
		Build relationships with local PAC chairs with goal of increasing communication/gaining contributors on a monthly basis	1st Q	9/30/13		
			2nd Q	12/31/13		
			3rd Q	3/31/14		
			4th Q	6/30/14		
Chapter Presidents						
	Improve membership numbers and attendance at local chapter meetings/functions.	Increase member attendance at monthly meetings	1st Q	9/30/13	9/30/2013	Half the chapters present
			2nd Q	12/31/13	12/31/2013	
			3rd Q	3/31/14		
			4th Q	6/30/14		
		Plan a year of programs in advance and distribute to membership	1st Q	7/15/13	7/15/2013	
		Offer incentives to non-members to become members	1st Q	9/30/13	9/30/2013	
			2nd Q	12/31/13	12/31/2013	
			3rd Q	3/31/14		
			4th Q	6/30/14		
		Have a sponsor at every meeting	1st Q	9/30/13	9/30/2013	
			2nd Q	12/31/13	12/31/2013	
			3rd Q	3/31/14		
			4th Q	6/30/14		
		Actively promote member participation in TAHU state events	1st Q	9/30/13	9/30/2013	
			2nd Q	12/31/13	12/31/2013	
			3rd Q	3/31/14		
			4th Q	6/30/14		
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	9/30/13		
		Hold Event with the Community	2nd Q	12/31/13		
		Publish articles for the TAHU News; 2 on CHIP and 2 on Chapter Support	1st Q	9/30/13		
			2nd Q	12/31/13		
			3rd Q	3/31/14		
			4th Q	6/30/14		
SysOp						
		State and chapter board rosters updated		7/31/13	7/31/2013	
Technology						
	Improve the traffic to the TAHU website and win the NAHU website award	Transition to YourMembership.org platform	3rd Q	3/31/14		
		Improve the content on the website and keep it current	3rd Q	3/31/14		
			4th Q	6/30/14		

Chapter Support	Improve relations with small chapters	Meet with small chapter presidents to discuss obstacles/challenges	2nd Q	12/31/13		
		Partner on CE and Legislative initiatives and dedicate resources to the small chapters	3rd Q	3/31/14		
Immed Past Pres	Garnish support for the Honorees Corporation	Send an email message to members educating them on what the Honorees Corporation is	2nd Q	12/31/13		
		Newsletter article showing how the Honorees Corporation has spent money in the past to help members or organizations	3rd Q	3/31/14		
	Blue Ribbon Certification	Follow guidelines for Blue Ribbon Certification	1st Q	9/30/13		
			2nd Q	12/31/13		
			3rd Q	3/31/14		
			4th Q	6/30/14		
	Create more awareness for LPRT membership	Newsletter article promoting LPRT membership and the perks that come with it	2nd Q	12/31/13		
		Email campaign to membership promoting LPRT membership and the perks that come with it	3rd Q	3/31/14		
	P&P Sunset Review	Implement discount for TAHU convention for LPRT membership	4th Q	6/30/14		
			1st Q	8/9/13	8/9/2013	
			2nd Q	10/18/13	10/18/2013	
			3rd Q	1/30/14		
			4th Q	4/30/14		