2015-2016 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	9/30/15		
			2nd Q	12/31/15		
			3rd Q	3/31/16		
			4th Q	6/30/16		
	Increase Augustaness and Chara Boot Breaties	Manthly calls with Chanter Presidents, Mambarshin/Detention	1=+0	0/20/45		4 coll
	Increase Awareness and Share Best Practices	Monthly calls with Chapter Presidents, Membership/Retention	1st Q	9/30/15		1 call
		Chairs and Board Member over Membership	2nd Q	12/31/15 3/31/16		3 calls
			3rd Q 4th Q	6/30/16		3 calls
			4th Q	6/30/16		3 calls
	Equip Membership/Membership Retention Chairs	Provide Hard Copies and Electronic Copies of Membership Materials	1st Q	9/30/15		
		eCommerce Training	1st Q	9/30/15		
	Disbribute Recruitment materials	Distribute TAHU Electronic Prospect Packet	1st Q	9/30/2015		
	T TAULIAN	0	4 . 0	0/00/45		
	Training for TAHU Membership/Membership Retention Chairs	Chapter Membership Training - Region VI Meeting	1st Q	9/30/15		
	Membership Recruitment - Landmark Award	Hold a membership blitz	1st Q	9/30/15		
	Membership Reordinancia Editamancia Ward	Tiold a monisoronip binz	3rd Q	3/31/16		
				0,0		
	Monthly Outreach	Monthly Chapter eMail with Membership Results/Updates/Reminders	1st Q	9/30/15		3 emails
			2nd Q	12/31/15		3 emails
			3rd Q	3/31/16		3 emails
			4th Q	6/30/16		3 emails
	Membership Drive - Landmark Award	100% Board Recruitment Contest 5/1/15 - 4/30/16	4th Q	4/30/16		
	Membership Drive - Landmark Award	Ongoing Membership Campaign lasting 3 - 6 months - 9/1 - 11/30	2nd O	11/30/15		
	Membership Drive - Landmark Award	Origoning Membership Campaign lasting 3 - 6 months - 5/1 - 11/30	Ziiu Q	11/30/13		
			_			
			-			
Membership Retention	Maintain retention rate of 85%	Send out lapse list monthly to all chapters with spreadsheet	-			
Retention		Maintain the Chapter Retention Spreadsheets Monthly	1st Q	9/30/15		3 emails
		Maintain the Chapter Retention Spreadsheets Monthly	2nd Q	12/31/15		3 emails
			3rd Q	3/31/16		3 emails
			4th Q	6/30/16		3 emails
			7111 Q	0/00/10		o cinalio
	TAHU Convention-Presentation to Small, Medium & Large	TAHU Triple Crown Drawing	4th Q	5/1/16		
	Chapter Winners for Membership/Membership Retention					
		Membership Growth/Membership Retention Winners for 2015-2016	4th Q	5/1/16		
			-			
Awards	Apply for NAHU Awards	Communicate award criteria and timeline with chapters - Landmark and	1st Q	9/30/15		
Awarus	Apply for IVALIO Awards	Presidential Citation, Media Relations, Legislative Excellence, Website	2nd Q	12/31/15		
		residential Ottation, Wedia Relations, Legislative Excellence, Website	3rd Q	3/31/16		
		<u>-</u>				
Marketing	Obtain a sponsor for 2nd quarterly board meeting	Development of sales approach to potential sponsors	1st Q	9/30/15		
	Applet convention committee with the latest and a	Development of color approach to not collection	4-10	0/20/45		
	Assist convention committee with obtaining sponsors	Development of sales approach to potential sponsors	1st Q	9/30/15		
			2nd Q 3rd Q	12/31/15	 	
			4th Q	3/31/15 5/1/16		

Professional	Improve professional development activities for members and	Send out P&P's to all Chapter Professional Development Chairs	1st Q	7/14/15	7/14/2015	

	the ability for them to obtain various designations, etc.		[
		Set up reports in Drop Box	2nd Q	12/31/15	
		oot up reports in Brop Box	Zild Q	12/01/10	
		Update TAHU course list with NAHU-sponsored programs through	1st Q	9/30/15	
		reciprocity.	2nd Q	12/31/15	
			3rd Q	3/31/16	
			4th Q	6/30/16	
		Hold quarterly conference calls/personal contact	1st Q	9/30/15	
			2nd Q	12/31/15	
			3rd Q	3/31/16 6/30/16	
			4th Q	0/30/10	
		Review of courses due to expire and contact the instructor on whether	1st Q	9/30/15	(handled by Exec. Dir.)
		to renew or develop a new course	2nd Q	12/31/15	(Harraica by Exec. Bit.)
		to romain or develop a new course	3rd Q	3/31/16	
			4th Q		
Media	Keep the membership informed on association activities with		1st Q	9/30/15	
	articles to enhance knowledge and member development		2nd Q	13/31/15	1
			3rd Q	3/31/16	1
			4th Q	6/30/16	
	Increase media interviews conducted with TAHU members	Work with EMG	1st Q	9/30/15	
	increase media interviews conducted with TAHO members	WOIK WITH EIVIG	2nd Q	12/31/15	
			211d Q 3rd Q	3/31/16	1
			4th Q	6/30/16	
			701 0	0/30/10	
			1		
Newsletter	Keep the membership informed on association activities	Keep magazine at 32 pages per contract	1st Q	9/30/15	
	with articles to enhance knowledge and member		2nd Q	12/31/15	
	development.		3rd Q	3/31/16	
			4th Q	6/30/16	
		Receive articles and pictures from at least 10 of 15 chapters	1st Q	9/30/15	
i					
			2nd Q	13/31/15	
			3rd Q	3/31/16	
				3/31/16	
			3rd Q	3/31/16	
TAULI Enoug	Koon membership informed of state shorter estibilities on	Distribute Facus quarted to include information regarding chapter	3rd Q 4th Q	3/31/16 6/30/16	
TAHU Enews	Keep membership informed of state chapter activities on a regular basis	Distribute Enews quarterly to include information regarding chapter	3rd Q 4th Q 1st Q	3/31/16 6/30/16 9/30/15	
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.	3rd Q 4th Q 1st Q 2nd Q	3/31/16 6/30/16 9/30/15 12/31/15	
TAHU Enews			3rd Q 4th Q 1st Q 2nd Q 3rd Q	3/31/16 6/30/16 9/30/15 12/31/15 3/31/16	
TAHU Enews			3rd Q 4th Q 1st Q 2nd Q	3/31/16 6/30/16 9/30/15 12/31/15	
	a regular basis.	activities. Update format and look to include Hot links to FB, etc.	3rd Q 4th Q 1st Q 2nd Q 3rd Q 4th Q	3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 6/30/16	
TAHU Enews Convention			3rd Q 4th Q 1st Q 2nd Q 3rd Q	3/31/16 6/30/16 9/30/15 12/31/15 3/31/16	
	a regular basis.	activities. Update format and look to include Hot links to FB, etc.	3rd Q 4th Q 1st Q 2nd Q 3rd Q 4th Q 1st Q	3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 6/30/16 9/30/15	
	a regular basis.	activities. Update format and look to include Hot links to FB, etc. Develop an appealing and catchy theme	3rd Q 4th Q 1st Q 2nd Q 3rd Q 4th Q 1st Q 2nd Q	3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 6/30/16 9/30/15 12/31/15	
	a regular basis.	activities. Update format and look to include Hot links to FB, etc. Develop an appealing and catchy theme	3rd Q 4th Q 1st Q 2nd Q 3rd Q 4th Q 1st Q	3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 6/30/16 9/30/15 12/31/15	
	a regular basis.	activities. Update format and look to include Hot links to FB, etc. Develop an appealing and catchy theme Save the date in Enews & TAHU News	3rd Q 4th Q 1st Q 2nd Q 3rd Q 4th Q 1st Q 2nd Q 3rd Q	3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 6/30/16 9/30/15 9/30/15 12/31/15 3/31/16	
	a regular basis.	activities. Update format and look to include Hot links to FB, etc. Develop an appealing and catchy theme	3rd Q 4th Q 1st Q 2nd Q 3rd Q 4th Q 1st Q 2nd Q	9/30/15 12/31/15 3/31/16 6/30/16 9/30/15 9/30/15 9/30/15 12/31/15 3/31/16	
	a regular basis.	Develop an appealing and catchy theme Save the date in Enews & TAHU News Save the date to potential exhibitors & sponsors	3rd Q 4th Q 1st Q 2nd Q 3rd Q 4th Q 1st Q 2nd Q 3rd Q 2nd Q	3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 6/30/16 9/30/15 12/31/15 3/31/16	
	a regular basis.	activities. Update format and look to include Hot links to FB, etc. Develop an appealing and catchy theme Save the date in Enews & TAHU News	3rd Q 4th Q 1st Q 2nd Q 3rd Q 4th Q 1st Q 2nd Q 3rd Q 2nd Q	3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 6/30/16 9/30/15 9/30/15 12/31/15 3/31/16 12/31/15	
	a regular basis.	Develop an appealing and catchy theme Save the date in Enews & TAHU News Save the date to potential exhibitors & sponsors	3rd Q 4th Q 1st Q 2nd Q 3rd Q 4th Q 1st Q 2nd Q 2nd Q 2nd Q 2nd Q	3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 12/31/15 9/30/15 12/31/15	
	a regular basis.	Develop an appealing and catchy theme Save the date in Enews & TAHU News Save the date to potential exhibitors & sponsors	3rd Q 4th Q 1st Q 2nd Q 3rd Q 4th Q 1st Q 2nd Q 3rd Q 2nd Q	3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 6/30/16 9/30/15 9/30/15 12/31/15 3/31/16 12/31/15	
	a regular basis.	Develop an appealing and catchy theme Save the date in Enews & TAHU News Save the date to potential exhibitors & sponsors Actively market to exhibitors & sponsors	1st Q 2nd Q 3rd Q 4th Q 4th Q 1st Q 2nd Q 3rd Q 2nd Q 2nd Q 2nd Q 3rd Q	3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 12/31/15 9/30/15 12/31/15 3/31/16	
	a regular basis.	Develop an appealing and catchy theme Save the date in Enews & TAHU News Save the date to potential exhibitors & sponsors	3rd Q 4th Q 1st Q 2nd Q 3rd Q 4th Q 1st Q 2nd Q 3rd Q 2nd Q 2nd Q 3rd Q	3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 12/31/15 12/31/15 3/31/16 9/30/15	
	a regular basis.	Develop an appealing and catchy theme Save the date in Enews & TAHU News Save the date to potential exhibitors & sponsors Actively market to exhibitors & sponsors	3rd Q 4th Q 1st Q 2nd Q 4th Q 1st Q 2nd Q 2nd Q 3rd Q 2nd Q 3rd Q 2nd Q 1st Q 2nd Q 1st Q 2nd Q	3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 12/31/15 12/31/15 3/31/16	
	a regular basis.	Develop an appealing and catchy theme Save the date in Enews & TAHU News Save the date to potential exhibitors & sponsors Actively market to exhibitors & sponsors	3rd Q 4th Q 1st Q 2nd Q 3rd Q 4th Q 1st Q 2nd Q 3rd Q 2nd Q 2nd Q 3rd Q	3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 12/31/15 12/31/15 3/31/16 9/30/15	
	a regular basis.	Develop an appealing and catchy theme Save the date in Enews & TAHU News Save the date to potential exhibitors & sponsors Actively market to exhibitors & sponsors	3rd Q 4th Q 1st Q 2nd Q 4th Q 1st Q 2nd Q 2nd Q 3rd Q 2nd Q 3rd Q 2nd Q 1st Q 2nd Q 1st Q 2nd Q	3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 12/31/15 12/31/15 3/31/16	
	a regular basis.	Develop an appealing and catchy theme Save the date in Enews & TAHU News Save the date to potential exhibitors & sponsors Actively market to exhibitors & sponsors Engage local chapter's participation	3rd Q 4th Q 1st Q 2rd Q 3rd Q 4th Q 1st Q 2rd Q 3rd Q 2rd Q 2rd Q 2rd Q 2rd Q 3rd Q	3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 12/31/15 3/31/16 12/31/15 3/31/16 12/31/15 12/31/15 12/31/15	
	a regular basis.	Develop an appealing and catchy theme Save the date in Enews & TAHU News Save the date to potential exhibitors & sponsors Actively market to exhibitors & sponsors Engage local chapter's participation	1st Q 2nd Q 3rd Q 3rd Q 4th Q 1st Q 2nd Q 2nd Q 2nd Q 3rd Q 2nd Q 3rd Q 2nd Q 3rd Q	3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 12/31/15 3/31/16 12/31/15 3/31/16 12/31/15 12/31/15 12/31/15	
	a regular basis.	Develop an appealing and catchy theme Save the date in Enews & TAHU News Save the date to potential exhibitors & sponsors Actively market to exhibitors & sponsors Engage local chapter's participation	3rd Q 4th Q 1st Q 2rd Q 3rd Q 4th Q 1st Q 2rd Q 3rd Q 2rd Q 3rd Q 2rd Q 3rd Q 2rd Q 3rd Q 3rd Q	3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 12/31/15 3/31/16 12/31/15 3/31/16 12/31/15 3/31/16 12/31/15 3/31/16	
	a regular basis.	Develop an appealing and catchy theme Save the date in Enews & TAHU News Save the date to potential exhibitors & sponsors Actively market to exhibitors & sponsors Engage local chapter's participation Actively market to other association	3rd Q 4th Q 1st Q 2nd Q 4th Q 1st Q 2nd Q 3rd Q 2nd Q 3rd Q 2nd Q 2nd Q 3rd Q 2nd Q 3rd Q 1st Q 2nd Q 3rd Q	3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 12/31/15 3/31/16 12/31/15 3/31/16 12/31/15 3/31/16 12/31/15 3/31/16	
	a regular basis.	Develop an appealing and catchy theme Save the date in Enews & TAHU News Save the date to potential exhibitors & sponsors Actively market to exhibitors & sponsors Engage local chapter's participation Actively market to other association	3rd Q 4th Q 1st Q 2rd Q 3rd Q 4th Q 1st Q 2rd Q 3rd Q 2rd Q 3rd Q 2rd Q 3rd Q 2rd Q 3rd Q 3rd Q	3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 12/31/15 3/31/16 12/31/15 3/31/16 12/31/15 3/31/16 12/31/15 3/31/16	
	a regular basis.	Develop an appealing and catchy theme Save the date in Enews & TAHU News Save the date to potential exhibitors & sponsors Actively market to exhibitors & sponsors Engage local chapter's participation Actively market to other association Marketing emails to each chapter	3rd Q 4th Q 1st Q 2rd Q 3rd Q 4th Q 1st Q 2rd Q 3rd Q 2rd Q 2rd Q 3rd Q 2rd Q 3rd Q 2rd Q 3rd Q 2rd Q 3rd Q	3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 12/31/15 3/31/16 12/31/15 3/31/16 12/31/15 3/31/16 12/31/15 3/31/16 12/31/15 3/31/16	
	a regular basis.	Develop an appealing and catchy theme Save the date in Enews & TAHU News Save the date to potential exhibitors & sponsors Actively market to exhibitors & sponsors Engage local chapter's participation Actively market to other association	3rd Q 4th Q 1st Q 2nd Q 4th Q 1st Q 2nd Q 3rd Q 2nd Q 3rd Q 2nd Q 2nd Q 3rd Q 2nd Q 3rd Q 1st Q 2nd Q 3rd Q	3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 6/30/16 9/30/15 12/31/15 3/31/16 12/31/15 3/31/16 12/31/15 3/31/16 12/31/15 3/31/16 12/31/15 3/31/16 12/31/15 3/31/16 12/31/15 3/31/16	

1			3rd Q	3/31/16		
1		Re-evaluate the structure of the Hollis Roberson awards dinner	2nd Q	12/31/15		
Legislation	Keep membership informed on all association, state and	Have a Legislative Day focused on industry happenings	3rd Q	3/31/16		
	federal legislative activities.					
		Hold Monthly Legislative Teleconferences with the Legislative Council	1st Q	9/30/15		(a minimum of 10 calls for the year)
		and Local Chapter Legislative Chairs and Chapter Presidents.	2nd Q	12/31/15		
			3rd Q 4th Q	3/31/16 6/30/16		
		Distribute a minimum of 2 Operation Shouts at the TAHU level	1st Q	9/30/15 12/31/15		
			2nd Q 3rd Q			
			4th Q	6/30/15		
		Distribute the Dectoords From The Lodge with a minimum of 2 by the 4th O	1st Q	9/30/15	\longrightarrow	
		Distribute the Postcards From The Ledge with a minimum of 3 by the 4th Q	2nd Q	12/31/15		
			3rd Q	3/31/15		
			4th Q	6/30/15	\longrightarrow	
		Develop legislative press releases with a minimum of 3 by 4th Q	1st Q	9/30/15		
			2nd Q	12/31/15		
			3rd Q 4th Q	3/31/16		
			4th Q	6/30/16		
	Confirm participation with Key Contacts	Provide role description and confirm future participation	1st Q	9/30/15		
	Increase TAHUPAC contributions	25% growth focusing on \$10,000 contributed to Leg Fund	1st Q	9/30/15	\longrightarrow	
	increase TAHUPAC contributions	25% growth focusing on \$10,000 contributed to Leg Fund	2nd Q	12/31/15		
			3rd Q	3/31/16		
			4th Q	6/30/16		
	Legislative Article in TAHU magazine	One per issue of the magazine	1st Q	9/30/15		
			2nd Q			
			3rd Q 4th Q	3/31/16 6/30/16	\longrightarrow	
			401 Q	0/30/10		
		Establish video explaining TAHUPAC/HUPAC, drilling into the difference between the Legislative Fund and the PAC	2nd Q	12/31/15		
		Top 3 TAHUPAC Contributor Recognition	4th Q	6/30/16		
Chapter Presid	en Improve membership numbers and attendance at local	Increase member attendance at monthly meetings by including focus on	1st Q			_
C.iapio coia	chapter meetings/functions.	relevant industry-related presentations	2nd Q			
			3rd Q			
			4th Q			
		Plan quarterly programs in advance and distribute to membership	1st Q			
			2nd Q 3rd Q			
			4th Q			
		Offer incentives to non-members to become members				
			1st Q 2nd Q		\longrightarrow	
			3rd Q			
			4th Q			
		Activaly promote member participation in TAULI state events and	1st Q			
		Actively promote member participation in TAHU state events and TAHUPAC	2nd Q	 		
			3rd Q			
			4th Q	 	\longrightarrow	
	Improve chapter communications to the membership	Utilizing the chapter website to provide relevant information, ie., press	1st Q			
		releases, newsletters, video testimonials, social media, etc.	2nd Q			
1			3rd Q 4th Q	 	\longrightarrow	
			00			
•				·		

SysOp		State and chapter board rosters updated	1st Q	9/30/15		
Technology	Improve the traffic to the TAHU website and win the NAHU	Improve the content on the website and keep it current	1st Q			
	website award		2nd Q			
			3rd Q			
			4th Q			
Chanter Sunnor	t Continue to lend support to the new South Texas AHU Chapte	·	1st Q	9/30/15		
onapter oupper	Continue to forth support to the new count results into chapte		2nd Q	12/31/15		
			3rd Q			
			4th Q			
	Reach out to each Texas Chapter	Ask what their challenges are and how they might be best served	1st Q			
			2nd Q			
			3rd Q			
			4th Q	6/30/15		
	Work with West Texas AHU Chapter	Re-charge with a membership recruitment activity with CE and	2nd Q	12/31/15		
	Tront man troot rondo na lo onaptor	sponsorships to cover the cost (medicare brokers/financial planners)	2.1.0 Q	12/01/10		
		.,				
Immed Past Pres	Increasing awareness and garnishing support for the	Highlighting its importance and purpose at all board meetings and				
	TAHU Honorees Corporation	Association events	1st Q			
			2nd Q	12/31/15		
			3rd Q 4th Q	3/31/16 6/30/16		
			4th Q	6/30/16		
	P&P Sunset Review	Monitor all TAHU P&Ps	1st Q	9/30/15		
		morner an intro t at o	2nd Q	12/31/15		
			3rd Q	3/31/16		
			4th Q	6/30/15		
					-	