

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 Awareness and Share Best Practices	Monthly calls with Chapter Presidents, Membership/Retention Chairs and Board Member over Membership	1st Q	9/30/15	1 call
			2nd Q	12/31/15	3 calls
			3rd Q	3/31/16	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	
	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	
			3rd Q	3/31/16	
	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 Q	11/30/15	
Membership Retention	Maintain retention rate of 85%	Send out lapse list monthly to all chapters with spreadsheet			
		Maintain the Chapter Retention Spreadsheets Monthly	1st Q	9/30/15	3 emails
			2nd Q	12/31/15	3 emails
			3rd Q	3/31/16	3 emails
	TAHU Convention-Presentation to Small, Medium & Large Chapter Winners for Membership/Membership Retention	TAHU Triple Crown Drawing	4th Q	5/1/16	
		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 Presidential Citation, Media Relations, Legislative Excellence, Website	1st Q	9/30/15	
			2nd Q	12/31/15	
			3rd Q	3/31/16	
Marketing	Obtain a sponsor for 2nd quarterly board meeting	Development of sales approach to potential sponsors	1st Q	9/30/15	
	Assist convention committee with obtaining sponsors	Development of sales approach to potential sponsors	1st Q	9/30/15	
			2nd Q	12/31/15	
			3rd Q	3/31/15	
			4th Q	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

Development	the ability for them to obtain various designations, etc.				
		Set up reports in Drop Box	2nd Q	12/31/15	
		Update TAHU course list with NAHU-sponsored programs through reciprocity.	1st Q	9/30/15	
			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	
			4th Q	6/30/16	
		Review of courses due to expire and contact the instructor on whether to renew or develop a new course	1st Q	9/30/15	(handled by Exec. Dir.)
			2nd Q	12/31/15	
			3rd Q	3/31/16	
			4th Q	6/30/16	
Media	Keep the membership informed on association activities with articles to enhance knowledge and member development		1st Q	9/30/15	
			2nd Q	13/31/15	
			3rd Q	3/31/16	
			4th Q	6/30/16	
	Increase media interviews conducted with TAHU members	Work with EMG	1st Q	9/30/15	
			2nd Q	12/31/15	
			3rd Q	3/31/16	
			4th Q	6/30/16	
Newsletter	Keep the membership informed on association activities with articles to enhance knowledge and member development.	Keep magazine at 32 pages per contract	1st Q	9/30/15	
			2nd Q	12/31/15	
			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	
			2nd Q	13/31/15	
			3rd Q	3/31/16	
			4th Q	6/30/16	
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	9/30/15	
			2nd Q	12/31/15	
			3rd Q	3/31/16	
			4th Q	6/30/16	
Convention	Achieve or exceed budgeted attendance	Develop an appealing and catchy theme	1st Q	9/30/15	
		Save the date in Enews & TAHU News	1st Q	9/30/15	
			2nd Q	12/31/15	
			3rd Q	3/31/16	
		Save the date to potential exhibitors & sponsors	2nd Q	12/31/15	
		Actively market to exhibitors & sponsors	1st Q	9/30/15	
			2nd Q	12/31/15	
			3rd Q	3/31/16	
		Engage local chapter's participation	1st Q	9/30/15	
			2nd Q	12/31/15	
			3rd Q	3/31/16	
		Actively market to other association	2nd Q	12/31/15	
			3rd Q	3/31/16	
		Marketing emails to each chapter	1st Q	9/30/15	
			2nd Q	12/31/15	
			3rd Q	3/31/16	
		Marketing through social media	1st Q	9/30/15	
			2nd Q	12/31/15	

		Re-evaluate the structure of the Hollis Roberson awards dinner	3rd Q	3/31/16		
			2nd Q	12/31/15		
Legislation	Keep membership informed on all association, state and federal legislative activities.	Have a Legislative Day focused on industry happenings	3rd Q	3/31/16		
		Hold Monthly Legislative Teleconferences with the Legislative Council and Local Chapter Legislative Chairs and Chapter Presidents.	1st Q	9/30/15		(a minimum of 10 calls for the year)
			2nd Q	12/31/15		
			3rd Q	3/31/16		
			4th Q	6/30/16		
		Distribute a minimum of 2 Operation Shouts at the TAHU level	1st Q	9/30/15		
			2nd Q	12/31/15		
			3rd Q	3/31/15		
			4th Q	6/30/15		
		Distribute the Postcards From The Ledge with a minimum of 3 by the 4th Q	1st Q	9/30/15		
			2nd Q	12/31/15		
			3rd Q	3/31/15		
			4th Q	6/30/15		
		Develop legislative press releases with a minimum of 3 by 4th Q	1st Q	9/30/15		
			2nd Q	12/31/15		
			3rd 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		
			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	12/31/15		
			3rd Q	3/31/16		
			4th Q	6/30/16		
		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 President	Improve membership numbers and attendance at local chapter meetings/functions.	Increase member attendance at monthly meetings by including focus on relevant industry-related presentations	1st Q			
			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			
			3rd Q			
			4th Q			
		Actively promote member participation in TAHU state events and TAHUPAC	1st Q			
			2nd Q			
			3rd Q			
			4th Q			
	Improve chapter communications to the membership	Utilizing the chapter website to provide relevant information, ie., press releases, newsletters, video testimonials, social media, etc.	1st Q			
			2nd Q			
			3rd Q			
			4th Q			

SysOp			State and chapter board rosters updated	1st Q	9/30/15		
Technology			Improve the traffic to the TAHU website and win the NAHU website award	1st Q			
				2nd Q			
				3rd Q			
				4th Q			
Chapter Support			Continue to lend support to the new South Texas AHU Chapter	1st Q	9/30/15		
				2nd Q	12/31/15		
				3rd Q	3/31/16		
				4th Q	6/30/16		
			Reach out to each Texas Chapter	1st Q	9/30/15		
			Ask what their challenges are and how they might be best served	2nd Q	12/31/15		
				3rd Q	3/31/16		
				4th Q	6/30/15		
			Work with West Texas AHU Chapter	2nd Q	12/31/15		
			Re-charge with a membership recruitment activity with CE and sponsorships to cover the cost (medicare brokers/financial planners)				
Immed Past Pres			Increasing awareness and garnishing support for the TAHU Honorees Corporation	1st Q	9/30/15		
			Highlighting its importance and purpose at all board meetings and Association events	2nd Q	12/31/15		
				3rd Q	3/31/16		
				4th Q	6/30/16		
			P&P Sunset Review	1st Q	9/30/15		
			Monitor all TAHU P&Ps	2nd Q	12/31/15		
				3rd Q	3/31/16		
				4th Q	6/30/15		