

**2020-2021 TAHU Strategic Plan**

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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.					
<b>Chair</b>	<b>Goal</b>	<b>Steps To Achieve Goal</b>		<b>Due Date</b>	<b>Complete?</b>
<b>EC Immed Past Pres</b>	TAHU Honorees Corporation	Emphasize importance of all opportunities for contributions at BOD meetings conference calls and TAHU Events	1st Q 2nd Q 3rd Q 4th Q	9/30/20 12/31/20 3/31/21 6/30/21	
	P&P Sunset Review	Monitor all TAHU P&Ps and ensure they are current and up to date	1st Q 2nd Q 3rd Q 4th Q	9/30/20 12/31/20 3/31/21 6/30/21	
	Promote LPRT program and achieve blue ribbon status	Educate the chapters on the program by promoting through blast emails and working with them in gathering information necessary to achieve blue ribbon status.	1st Q 2nd Q 3rd Q 4th Q	9/30/20 12/31/20 3/31/21 6/30/21	
<b>EC Secretary</b>					
<b>Membership Growth</b>	Maintain positive growth each quarter and increase retention		1st Q 2nd Q 3rd Q 4th Q	9/30/20 12/31/20 3/31/21 6/30/21	
	Increase Awareness and Share Best Practices	Monthly chapter calls with Chapter Presidents, Membership/Retention Chairs	1st Q 2nd Q 3rd Q 4th Q	9/30/20 12/31/20 3/31/21 6/30/21	
		Provide membership powerpoint presentation for local chapters to use during luncheons and events	1st Q	9/30/19	
		Distribute prospective new member packet	2nd Q	12/31/19	
	Monthly Outreach	Monthly Chapter eMail with Membership Results/Updates/Reminders	1st Q 2nd Q 3rd Q 4th Q	9/30/20 12/31/20 3/31/21 6/30/21	
	Membership Recruitment-Landmark Award	Hold a membership blitz	1st Q 2nd Q 3rd Q	9/30/20 12/31/20 3/31/21	
	Membership Campaign-Landmark Award	100% Board recruitment contest	1st Q 2nd Q 3rd Q	9/30/20 12/31/20 3/31/21	
	Membership Campaign-Landmark Award	Ongoing membership campaign lasting 3-6 months	1st Q 2nd Q 3rd Q	9/30/20 12/31/20 3/31/21	
	Landmark Award Documentation	Call minutes and attendance template-Send to Awards Chair	2nd Q	12/31/20	
<b>Membership</b>	Increase retention rate to 85%		1st Q	9/30/20	

<b>Retention</b>			2nd Q	12/31/20	
			3rd Q	3/31/21	
			4th Q	6/30/21	
	Equip Membership/Retention Chairs	eCommerce Training	1st Q	9/30/20	
		Monthly Email Reminders to Local Membership/Retention Chairs to pull the new member report/lapse report/billed not paid	1st Q	9/30/20	
			2nd Q	12/31/20	
			3rd Q	3/31/21	
			4th Q	6/30/21	
<b>Chapter Support</b>	Reach out to Chapter Presidents in advance of EC visits to see how their marketing of the luncheon is going	Determine if chapters need assistance with marketing efforts and membership recruitment to coincide with their events	1st Q	9/30/20	
			2nd Q	12/31/20	
			3rd Q	3/31/21	
			4th Q	6/30/21	
	Work with West Texas and San Angelo chapters to increase members	Schedule monthly conference calls to discuss issues, hold webinars and CE at luncheons and special events	1st Q	9/30/20	
			2nd Q	12/31/20	
			3rd Q	3/31/21	
			4th Q	6/30/21	
	Virtual Chapter Active				
		Have by laws and chapter active	3rd Q	1/1/21	
	Chair person	Nominate and appoint to TAHU Board	1st Q	9/30/20	
	Website	Virtual Website active	1st Q	9/30/20	
<b>EC Treasurer</b>					
<b>Professional Development</b>	Educate chapter PD chairs on development process in providing dynamic presentations	Prepare and Distribute Potential Speaker list to all PD Chairs	1st Q	9/30/20	
		Schedule initial and monthly PD Calls	1st Q	9/30/20	
		Meet with PD chairs and develop scheduling plan of action	1st Q	9/30/20	
<b>Awards</b>	Apply for NAHU Awards	Communicate award criteria and timeline with board chairs - Landmark, Presidential Citation, Media Relations, Legislative Excellence, Website	1st Q	9/30/20	
			2nd Q	12/31/20	
			3rd Q	3/31/21	
	Begin process to set up online submissions	Work with NAHU to build out process for TAHU chapter submissions	1st Q	9/30/20	
			3rd Q	3/31/21	
			4th Q	5/31/21	
	Combine award applications with award guidebook	Emulate Pacesetter award application and clean up awards guidebook criteria	1st Q	9/30/20	
			3rd Q	3/31/21	
			4th Q	6/30/21	
<b>EC 2nd VP</b>					
<b>Legislation</b>	Keep membership informed on all association, state and federal legislative activities.	Have a Legislative Day on 3/30/21 focused on industry legislative and regulatory developments	3rd Q	3/31/21	
		150 attendees at DATC and 20 agencies at roundtable function	3rd Q	3/31/21	
		Proactive communications with respect to major state or federal issues (minimum of 3 over next 12 months)	1st Q	9/30/20	
			2nd Q	12/31/20	
			3rd Q	3/31/21	
			4th Q	6/30/21	

		Hold Monthly Teleconferences with the Legislative Council	1st Q	9/30/20
			2nd Q	12/31/20
			3rd Q	3/31/21
			4th Q	6/30/21
		Hold Bi-Monthly Legislative Teleconferences with the Legislative Council and Local Chapter Legislative Chairs and Chapter Presidents	1st Q	9/30/20
			2nd Q	12/31/20
			3rd Q	3/31/21
			4th Q	6/30/21
		Develop 2 legislative press releases/ OpEd by 4th quarter	4th Q	6/30/21
	Develop Robust Key Contacts Program	100% of assignment to targeted legislators	4th Q	6/30/21
	Industry Relations	8 meetings by the 4th quarter	4th Q	6/30/21
	Increase member participation in HUPAC and TAHUPAC	100% of State and Local Board participation	1st Q	9/30/20
			2nd Q	12/31/20
			3rd Q	3/31/21
			4th Q	6/30/21
		Top 3 TAHUPAC Contributor Recognition	4th Q	6/30/21
	Legislative Article in TAHU magazine	One per issue of the magazine	1st Q	9/30/20
			2nd Q	12/31/20
			3rd Q	3/31/21
			4th Q	6/30/21
	<b>EC 1st VP</b>			
	<b>Media</b>	Actively engage with Chapter Presidents for Press Release to local media	Hold quarterly conference calls	1st Q 9/30/20
				2nd Q 12/31/20
				3rd Q 3/31/21
				4th Q 6/30/21
	Actively engage with Chapter Presidents for Op Ed pieces to local media	Hold quarterly conference calls	1st Q	9/30/20
			2nd Q	12/31/20
			3rd Q	3/31/21
			4th Q	6/30/21
	Actively engage with Chapter Media Chairs for Press Release to local media	Hold quarterly conference calls	1st Q	9/30/20
			2nd Q	12/31/20
			3rd Q	3/31/21
			4th Q	6/30/21
	Actively engage with Media Chair for Op Ed pieces to local media	Hold quarterly conference calls	1st Q	9/30/20
			2nd Q	12/31/20
			3rd Q	3/31/21
			4th Q	6/30/21
	Gather Media contacts from local Media Chairs	Update media contacts	1st Q	9/30/20
	Submit Press Releases to Media		1st Q	9/30/20
			2nd Q	12/31/20
			3rd Q	3/31/21
			4th Q	6/30/21
	Submit Op Ed Pieces to the Media		1st Q	9/30/20
			2nd Q	12/31/20

			3rd Q	3/31/21
			4th Q	6/30/21
	Present Working With The Media presentation at the Strategic Planning	Present Working With The Media presentation at Strategic Planning Meeting	1st Q	9/30/20
	Submit National Media Award	Send award requirements to Awards Chair as they are received.	3rd Q	3/31/21
	Media Relations Chair attends Annual Convention		4th Q	6/30/21
	Media Relations Chair attends Capitol Convention		3rd Q	3/31/21
<b>TAHU Enews</b>	Keep membership informed of state chapter activities on a regular basis.	Distribute Enews bi-monthly to include information regarding chapter activities.	1st Q	9/30/20
			2nd Q	12/31/20
			3rd Q	3/31/21
			4th Q	6/30/21
		Update format and look to include Hot links to FB, etc.	1st Q	9/30/20
<b>Newsletter</b>	Keep the membership informed on association activities with articles to enhance knowledge and member development.	Have electronic issues published on time each quarter. (Per issue requirements and due dates will be distributed to Chapter Presidents and TAHU Board by August 1, 2020)	1st Q	9/30/20
			2nd Q	12/31/20
			3rd Q	3/31/21
			4th Q	6/30/21
<b>Technology</b>	Improve the traffic to the TAHU website and win the NAHU website award	Work with awards chair	1st Q	9/30/20
			2nd Q	12/31/20
<b>SysOp</b>	Keep communication channels open and current	Update state and chapter board rosters	1st Q	9/30/20
<b>EC President Elect</b>				
<b>Convention</b>	Achieve or exceed budgeted attendance and sponsorship goals	Develop an appealing and catchy theme	1st Q	9/30/20
		Identify important topics of interests for brokers/members by survey What is their main focus and concerns as well as target population	1st Q	9/30/20
		Save the date in Enews & TAHU News	1st Q	9/30/20
		Save the date to potential exhibitors & sponsors that includes an offer to sponsor the same event.	1st Q	9/30/20
		Build agenda with dynamic speakers focused around the needs identified by brokers/members and driving increased attendance	1st Q	9/30/20
		Expand list of exhibitors and sponsors	1st Q	9/30/20
		Actively market to exhibitors & sponsors	2nd Q	12/31/20
			3rd Q	3/31/21
			4th Q	6/30/21
		Engage local chapter's participation and increase marketing emails to each chapter.	2nd Q	12/31/20
			3rd Q	3/31/21
			4th Q	6/30/21
		Actively market to other associations and trade industries - Build List of Contacts	2nd Q	12/31/20
			3rd Q	3/31/21
			4th Q	6/30/21
		Marketing through social media and convention app	2nd Q	12/31/20
			3rd Q	3/31/21

			4th Q	6/30/21	
		Expand list of attendees to include non-members	1st Q	9/30/20	
		Thank you to Exhibitors/Sponsors - Discuss commitment for next year	4th Q	12/31/20	
<b>Chapter Presidents</b>	Promote 100% TAHUPAC participation by local board members	Include on every board meeting agenda for discussion	1st Q	9/30/20	
			2nd Q	12/31/20	
			3rd Q	3/31/21	
			4th Q	6/30/21	
	Promote 100% HUPAC participation by local board members	Include on every board meeting agenda for discussion	1st Q	9/30/20	
			2nd Q	12/31/20	
			3rd Q	3/31/21	
			4th Q	6/30/21	
	Promote 100% Day at the Capitol and Convention attendance by local	Include on every board meeting agenda for discussion	1st Q	9/30/20	
			2nd Q	12/31/20	
			3rd Q	3/31/21	
			4th Q	6/30/21	
			2nd Q	12/31/20	
			3rd Q	3/31/21	
			4th Q	6/30/21	