

2016-2017 FWAHU Strategic Plan

Mission Statement:

The Fort Worth Association of Health Underwriters exists to inform and protect the consumer through the professional growth of its members.

Vision Statement:

Our vision is that every American will have access to quality, affordable health insurance and the services of professional insurance agents and brokers.

Chair	Goal	Steps To Achieve Goal	Due Date	Completed	NOTES			
Membership	Maintain positive growth each quarter	Same Day New Member Sign Up Free Event- If a new member signs up the day of an event - the event fees will be refunded Focus on NAHU and TAHU Promotions	4th Q	6/30/17				
			3rd Q	3/31/17				
			1st Q	9/30/16				
		Follow award criteria - keep up throughout the year	2nd Q	12/31/16				
			3rd Q	3/31/17				
			4th Q	6/30/17				
	Maintain retention rate at 85%	Contact Lapsed and Bill Not Paid List Monthly Promote benefits/value of membership with the association monthly	1st Q	9/30/16				
			2nd Q	12/31/16				
			3rd Q	3/31/17				
		4th Q	6/30/17					
		Marketing	Design a Metallic Corporate Sponsor Program and obtain sponsors for each monthly luncheon and major association events.	Development of sales approach to potential sponsors	3rd Q	3/31/17		
					4th Q	6/30/17		
Increase awareness of website capabilities	Website overview to membership and obtain and website sponsors		3rd Q	3/31/17				
			2nd Q	12/31/16				
Increase awareness of value of FWAHU membership	Develop a marketing piece on the value and benefits of FWAHU membership to include legislative accomplishments and professional development activities.		3rd Q	3/31/17				
			1st Q	9/30/16				
Awards	Apply for NAHU awards (Pacesetter, Website, Osler)	Communicate award criteria and timeline with board members	1st Q	9/30/16				
			2nd Q	12/31/16				
	Apply for TAHU awards (Chapter of the Year, Ouida, Website, Newsletter)	Communicate award criteria and timeline with board members	3rd Q	3/31/17				
			4th Q	6/30/17				
	Apply for Individual State and National Awards	Emerging Leader, Distinguished Service, Volunteer, Service	1st Q	9/30/16				
			2nd Q	12/31/16				
Professional Development	Provide more sales growth content for membership (may be non-CE)		1st Q	9/30/16				
			2nd Q	12/31/16				
			3rd Q	3/31/17				
			4th Q	6/30/17				
	Host NAHU Sponsored Worksite Certification		1st Q	9/30/16				
			2nd Q	12/31/16				
Host 5 hour SGS Renewal course		3rd Q	3/31/17					
		4th Q	6/30/17					
Host 8 hour SGS course		4th Q	6/30/17					
		4th Q	6/30/17					
Media	Increase chapter awareness through press releases and media hits	Maintain list of media contacts and forward the appropriate press releases to the list throughout the year noting NAHU, TAHU, or FWAHU	1st Q	9/30/16				
			2nd Q	12/31/16				
			3rd Q	3/31/17				

			4th Q	6/30/17		
		Coordinate with the legislative team	3rd Q	3/31/17		
Newsletter	Keep the membership informed on association activities with articles to enhance knowledge and member development.	Use board reports to develop newsletter content	1st Q	9/30/16		
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
		Member Spotlight of the Month	1st Q	9/30/16		
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
Legislation	Keep membership informed on all association, state and federal legislative activities.	Have a Legislative Meeting focused on industry happenings with regard to ACA	3rd Q	3/31/17		
		Provide Monthly Legislative Updates a the Member Luncheon	1st Q	9/30/16		
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
		Attendance at NAHU Cap Conference to include at minimum the President Elect and Legislative Chair	1st Q	9/30/16		
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
		Follow award criteria - keep up throughout the year	1st Q	9/30/16		
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
	Increase TAHUPAC/HUPAC contributions.	Increase overall chapter contributions to 15% of membership contributing to both HUPAC and TAHUPAC	1st Q	9/30/16		
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
		100% board member participation for HUPAC and TAHUPAC at NAHU Gold Seal level of participation	1st Q	9/30/16		
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
		Hold GRIP fundraising game at each monthly meeting and special events	1st Q	9/30/16		
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		
Public Outreach	Educate/improve the public perception of what association members do and how the association assists the consumer	Joint CHIP Event with DAHU and the Community	3rd Q	3/31/17		
Technology	Improve the traffic to the FWUHU website and win the TAHU and NAHU website awards	Utilize new tools accessible under new website	3rd Q	3/31/17		
		Improve the content on the website and keep it current	3rd Q	3/31/17		
			4th Q	6/30/17		
Vanguard Events	4 Vanguard Events either through chapter or working with surrounding area chapters	Vanguard Chair will meet with local chapters to discuss out of the box networking ideas - E.G. Rangers/Stars Game, Bowling, Top Golf, etc...	1st Q	9/30/16		
			2nd Q	12/31/16		
			3rd Q	3/31/17		
			4th Q	6/30/17		