

## 2020-2021 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		
<b>Membership</b>	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	6/30/21			
			4th Q	6/30/21			
			1st Q	9/30/20			
			2nd Q	12/13/20			
	Starting with 132 and ending with 145	Follow award criteria - keep up throughout the year	3rd Q	3/31/21			
			4th Q	6/30/21			
			1st Q	9/30/20			
			2nd Q	12/31/20			
	Maintain retention rate at 85%	Contact Lapsed and Bill Not Paid List Monthly Promote benefits/value of membership with the association monthly	3rd Q	3/31/21			
			4th Q	6/30/21			
			1st Q	9/30/20			
			2nd Q	12/31/20			
<b>Marketing</b>	Continue Corporate Sponsor Program and obtain sponsors for each monthly luncheon and major association events.	Development of sales approach to potential sponsors	3rd Q	3/31/21		This is ongoing	
			4th Q	6/30/21			
	Increase awareness of website capabilities	Website overview to membership and obtain and website sponsors	3rd Q	3/31/21			
			2nd Q	12/31/20			
	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. <i>(We have a NAHU Flyer but nothing for local)</i>	1st Q	9/30/20		This is ongoing	
			1st Q	9/30/20			
	<b>Awards</b>	Renew Chapter Seal Certification	Communicate criteria and timeline with board members	1st Q	9/30/20		
		Apply for NAHU awards (Pacesetter, Website, Osler)	Communicate award criteria and timeline with board members	1st Q	9/30/20		
Apply for TAHU awards (Chapter of the Year, Ouida, Website, Newsletter)		Communicate award criteria and timeline with board members	2nd Q	12/31/20			
			3rd Q	3/31/21			
			4th Q	6/30/21			
Apply for Individual State and National Awards		Emerging Leader, Distinguished Service, Volunteer, Service	1st Q	9/30/20			
			2nd Q	12/31/20			
			3rd Q	3/31/21			
	4th Q		6/30/21				
<b>Professional Development</b>	Provide more sales growth content for membership (may be non-CIPlan and schedule CE and non-CE courses)		1st Q	9/30/20		Need to discuss CE topics	
			2nd Q	12/31/20			
			3rd Q	3/31/21			
			4th Q	6/30/21			
	Host NAHU Sponsored Certification	Plan a Medicare certification in late spring 2021	4th Q	6/30/21			
			4th Q	6/30/21			
	Host 5 hour SGS Renewal course?	Plan TAHU SGS course and hold in conjunction with convention?	1st Q	9/30/20	No		
			1st Q	9/30/20	No		
			1st Q	9/30/20	No		
			1st Q	9/30/20	No		

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	Host 8 hour SGS course	Plan TAHU SGS course and hold in conjunction with convention?	1st Q	9/30/20	No	
<b>Media</b>	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  Also update Facebook, LimkedIn, Twitter, etc.  Coordinate with the legislative team	1st Q	9/30/19		
			2nd Q	12/31/19		
			3rd Q	3/31/20		
			4th Q	6/30/20		
			3rd Q	3/31/21		
<b>Newsletter</b>	Keep the membership informed on association activities with articles to enhance knowledge and member development.	Use board reports to develop newsletter content  Member Spotlight of the Month <i>Need to choose each month</i>	1st Q	9/30/20		
			2nd Q	12/31/20		
			3rd Q	3/31/21		
			4th Q	6/30/21		
			1st Q	9/30/20		
			2nd Q	12/31/20		
			3rd Q	3/31/21		
			4th Q	6/30/21		
<b>Legislation</b>	Keep membership informed on all association, state and federal legislative activities.  Increase TAHUPAC/HUPAC contributions.	Have a Legislative Meeting focused on industry happenings	3rd Q	3/31/21		
			Provide Monthly Legislative Updates at the Member Luncheon	1st Q	9/30/20	
				2nd Q	12/31/20	
				3rd Q	3/31/21	
		4th Q		6/30/21		
		Attendance at NAHU Cap Conference to include at minimum the President Elect and Legislative Chair	3rd Q	3/31/21		
			Follow award criteria - keep up throughout the year <i>*work with Awards chair</i>	1st Q	9/30/20	
				2nd Q	12/31/20	
				3rd Q	3/31/21	
		4th Q		6/30/21		
		Increase overall chapter contributions to 15% of membership contributing to both HUPAC and TAHUPAC	1st Q	9/30/20		
			2nd Q	12/31/20		
			3rd Q	3/31/21		
			4th Q	6/30/21		
		100% board member participation for HUPAC and TAHUPAC at NAHU Gold Seal level of participation	1st Q	9/30/20		
			2nd Q	12/31/20		
			3rd Q	3/31/21		
4th Q	6/30/21					
Hold GRIP fundraising game at each monthly meeting and special events	1st Q	9/30/20				
	2nd Q	12/31/20				
	3rd Q	3/31/21				
	4th Q	6/30/21				
<b>Public Outreach</b>	Educate/improve the public perception of what association members do and how the association assists the consumer	Host NAHU Education Foundation fund-raiser and discussion	3rd Q	3/31/21		
<b>Technology</b>	Improve the traffic to the FWUHU website and win the TAHU and NAHU website awards	Utilize new tools accessible under new website  Improve the content on the website and keep it current <i>*Media Chair, Awards Chair collaboration</i>	3rd Q	3/31/21		
			3rd Q	3/31/21		
			4th Q	6/30/21		

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<b>Vanguard Events</b>	2 Vanguard Event either through chapter or working with surrounding area chapters	Vanguard Chair will meet with local chapters to discuss out of the box networking ideas - ie., Stars, Top Golf, etc. Axe Throwing, Bowling, ??	2nd Q	12/31/20		
			3rd Q	3/31/21		

**July 2020** - AUDRA TO SWEAR IN NEW BOARD, Donna Carnall Presentation, Eric Johnson, hybrid in-person/online, Insurance Marketplace, food options? Discuss

**August 2020** - Sales Symposium, Rolling Hills. NEED SPONSORS, SPEAKERS; Budget (Rolling Hills bumped PEPM room rate from \$42.90 to **\$55.00**)

POSSIBLE DATES August 27 or September 3 (Rolling Hills ok with either)

*Topics? Telemedicine, COVID-19, Medicare, ACA Open Enrollment, What Else??*

**September 2020** - TBD, discuss CE/Speaker Topic, hybrid meeting?

**October 2020** - TBD, last year we did Health Care: A Right or a Privilege (Ethics CE with Eric Johnson)

**November 2020** - Vanguard Council Grip & Give; Last year we did Axe Throwing; discuss options keeping COVID-19/Flu in mind

**December 2020** - No Membership Meeting

**January 2021** - TBD; Last year we did Client Advocacy with Reid Rasmussen; discuss

**February 2021** - TBD; last year we did Dental Wellness with Erica from United Concordia; discuss

**March 2021** - Cap Con Updates and Legislative updates; COVID-19 Impact?

**April 2021** - Annual Golf Tournament, NAHU Certification; COVID-19 postponed our Golf Tourney; discuss

**May 2021** - TBD

**June 2021** - Chapter Awards and Donna Carnall Luncheon