

2021-2022 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	6/30/22			
			4th Q	6/30/22			
		Starting with 132 and ending with 145	Follow award criteria - keep up throughout the year	1st Q	9/30/21		
	2nd Q			12/31/21			
	3rd Q			3/31/22			
	4th Q			6/30/22			
		Maintain retention rate at 85%	Contact Lapsed and Bill Not Paid List Monthly Promote benefits/value of membership with the association monthly	1st Q	9/30/21		
	2nd Q			12/31/21			
	3rd Q			3/31/22			
	4th Q			6/30/22			
Marketing	Continue Corporate Sponsor Program and obtain sponsors for each monthly luncheon and major association events.	Development of sales approach to potential sponsors	3rd Q	3/31/22		This is ongoing	
			4th Q	6/30/22			
	Increase awareness of website capabilities	Website overview to membership and obtain and website sponsors	3rd Q	3/31/22			
	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>	2nd Q	12/31/21			
	Increase Activity on Social Media Outlets	Increase likes to 200 on Facebook page link FWAHU.com website posts to Facebook, Twitter, and LinkedIn accounts by encouraging members to like at meetings and through social media blasts	1st Q	9/30/21		This is ongoing	
Awards	Renew Chapter Seal Certification	Communicate criteria and timeline with board members	1st Q	9/30/21			
	Apply for NAHU awards (Pacesetter, Website, Osler)	Communicate award criteria and timeline with board members	1st Q	9/30/21			
	Apply for TAHU awards (Chapter of the Year, Ouida, Website, Newsletter)	Communicate award criteria and timeline with board members	2nd Q	12/31/21			
			3rd Q	3/31/22			
			4th Q	6/30/22			
	Apply for Individual State and National Awards	Emerging Leader, Distinguished Service, Volunteer, Service	1st Q	9/30/21			
			2nd Q	12/31/21			
			3rd Q	3/31/22			
4th Q			6/30/22				
Professional Development	Provide more sales growth content for membership (may be non-C Plan and schedule CE and non-CE courses)		1st Q	9/30/21		Need to discuss CE topics	
			2nd Q	12/31/21			
			3rd Q	3/31/22			
			4th Q	6/30/22			
	Host NAHU Sponsored Certification	Plan a Medicare certification in late spring 2021	4th Q	6/30/22			

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	Host 5 hour SGS Renewal course?	Plan TAHU SGS course and hold in conjunction with convention?	1st Q	9/30/21	No	
	Host 8 hour SGS course	Plan TAHU SGS course and hold in conjunction with convention?	1st Q	9/30/21	No	
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 Also update Facebook, LimkedIn, Twitter, etc. Coordinate with the legislative team	1st Q	9/30/21		
			2nd Q	12/31/21		
			3rd Q	3/31/22		
			4th Q	6/30/22		
			3rd Q	3/31/22		
Newsletter	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	9/30/21		
			2nd Q	12/31/21		
			3rd Q	3/31/22		
			4th Q	6/30/22		
			1st Q	9/30/21		
			2nd Q	12/31/21		
			3rd Q	3/31/22		
			4th Q	6/30/22		
Legislation	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	3/31/22		
			1st Q	9/30/21		
			2nd Q	12/31/21		
			3rd Q	3/31/22		
		Provide Monthly Legislative Updates at the Member Luncheon	1st Q	9/30/21		
			2nd Q	12/31/21		
			3rd Q	3/31/22		
			4th Q	6/30/22		
		Attendance at NAHU Cap Conference to include at minimum the President Elect and Legislative Chair	3rd Q	3/31/22		
			1st Q	9/30/21		
			2nd Q	12/31/21		
			3rd Q	3/31/22		
		Follow award criteria - keep up throughout the year <i>*work with Awards chair</i>	1st Q	9/30/21		
			2nd Q	12/31/21		
			3rd Q	3/31/22		
			4th Q	6/30/22		
Increase overall chapter contributions to 15% of membership contributing to both HUPAC and TAHUPAC	1st Q	9/30/21				
	2nd Q	12/31/21				
	3rd Q	3/31/22				
	4th Q	6/30/22				
100% board member participation for HUPAC and TAHUPAC at NAHU Gold Seal level of participation	1st Q	9/30/21				
	2nd Q	12/31/21				
	3rd Q	3/31/22				
	4th Q	6/30/22				
Hold GRIP fundraising game at each monthly meeting and special events	1st Q	9/30/21				
	2nd Q	12/31/21				
	3rd Q	3/31/22				
	4th Q	6/30/22				
Public Outreach	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	3/31/22		

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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	3/31/22		
		Improve the content on the website and keep it current <i>*Media Chair, Awards Chair collaboration</i>	3rd Q	3/31/22		
			4th Q	6/30/22		
Vanguard Events	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.	2nd Q	12/31/21		
		Axe Throwing, Bowling, ??	3rd Q	3/31/22		

1. Jul 2021 – Annual Awards Presentation and swearing in of 2021-22 board by Audra Sullivan, TAHU Past President; Donna Carnall presentation and 1 Hr CE by possibly Eric Johnson.
2. Aug 2021 – Sales Symposium at Lone Star Park (late August, tentatively 19th) – have Shannon and Mike Meroney to present Legislative update, reached out to Reid and a few other TAHU CE presenters. Discussed doing ½ day
3. Sept 2021 – 1 Hr CE
4. Oct 2021 – Ethics
5. Nov 2021 – Vanguard Council Gripe and Give Membership Meeting – Public Service
6. Dec 2021 – 1 Hr CE
7. Jan 2022 – 1 Hr CE – Chair massages?
8. Feb 2022 – New Year New Leads – Chaliese reaching out to Marshberry; NAHU Cap Con
9. Mar 2022 – Cap Con Update membership meeting; TAHU Day at the Capitol
10. Apr 2022 – TAHU Convention in Fort Worth; Golf Tournament in conjunction with Convention or separate?
11. May 2022 – NAHU Certification
12. June 2022 – Chapter Awards and Donna Carnall presentation, swearing the new board.