

2015 – 2015 Omaha Association of Health Underwriters STRATEGIC PLAN

2015-2015 BOARD: We have several new members on our Omaha Board. A primary objective initially is to ensure all members understand what we are hoping to accomplish at National, State and local levels for NAHU. Our objective is to have action plans aligned with The Pacesetter award and to track the Chairpersons' progress at each board meeting. Secondly, we will drive the involvement in NAHU, our Omaha Chapter, and the local community.

This document is an updated version of our 2015-16 plan and updates/revisions from last year's plan are highlighted.

Strategic Plan executed at Board Meetings:

- Review progress on OAHU Mission
 - **Fine-tune our tracking mechanism for accomplishments**
 - Distribute and explain the roles and goals of each Chair
 - Track and report progress in accomplishing roles & goals

- Give support and encouragement
 - Encourage making committees out of each chair position
 1. Introduce each Local chair to each State chair
 2. Suggest committee members

Strategic Plan – Encourage Participation for Regional, National, and Cap Conference Meetings

- Objective – ensure OAHU is represented in each function at full capacity as outlined in our guidelines
- Region IV meeting – attended by a minimum of three OAHU Board members.
- National Conference – attended by a minimum of three OAHU Board members
- Cap Conference -- attended by a minimum of three OAHU Board members.

Strategic Plan – Communication

- **Promote and deliver a quarterly e-newsletter for OAHU**
- Send Welcome packets to new members & personally call each one
- Ensure members have access and contact information to voice concerns
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Strategic Plan – Awards – Objective is to apply for the following

- PACESETTER Award
- **NAHU Chapter Recertification at the GOLD Level**

Strategic Plan – Media Relations – Objective is to engage local media, support Operation Shouts, promote state designated, “Health Insurance Awareness Month”. Advertise in local business journal to promote member services, identify agencies involved in NAHU.

OVERALL Strategic Plan – Our overall focus will be to perform solidly for the Pacesetter Award.

- Approximately 15 minutes of each Board meeting will be devoted to ensuring we are on course and meeting this objective. Internal Strategy – Renewed the 2 Appointed Awards Chairs as, “Co-Chairs” for this important position. Both have experience as a Board member in this post. The objective here is to ensure we use our veterans and are organized throughout the year.
- **Hold a 90 minute special Board meeting in March of 2016 to compile, review, and file for our Pacesetter Award.**
- Plan annual Golf Event (largest revenue venture) -- Create additional value for our members **and increase revenue for the Omaha chapter**

Strategic Plan – Programs / Education – Hold (6) Events at a minimum

- (4) will be CE Opportunities
- (2) will be Promotional events
 - Golf
 - Awards Luncheon

Strategic Planning- Financial

- Operate on a Balanced Budget
- Assess reserves – identify how much is adequate, identify if we do not need as much as we have, can we take some money and apply to Special Projects

Strategic Planning – Create Sponsorship packages for our members and sponsors.

Objective to design a minimum of three tiers of Sponsorship packages (Objective met), capture additional revenue while creating value, give back additional revenue to our members and / or community on behalf of our members.

- Create value in said packages
 - Advertisement
 - **OAHU Quarterly E-Newsletter**
 - Annual Golf outing
 - CE Events

Roadmap to 2015 – 2016 OAHU BOARD – PACESETTER AWARD

- NAHU EVENTS – Objective – Score 85%+ of eligible points
- Chapter Management – Objective – Score 85%+ of eligible points
- Local Meeting / Events – Objective – Score 85%+ of eligible points
- Membership – Objective – Score 85%+ of eligible points – We have a nationally recognized Membership Chair and an assistant for this committee.
- Public Service Projects – Objective - Score 100% of eligible points
- Media Relations – Objective - Score 100% of eligible points
- Education / Awards – Objective - Score 100% of eligible points

Chapter Accomplishments –

- Ensure Board members understand NAHU's position, mission and objectives from a national, regional, state and local perspective
- Provide Educational opportunities to our members
- Create Value for our sponsors
- Increase revenue opportunities for our local chapter
- Health Insurance Awareness Month
- Promote members through advertisements
- **Continue to develop and fine-tune Membership strategy**
- Pacesetter Award filing
- **Chapter Recertification Gold-Level Award filing**
- **Public Service – minimum of four projects and \$5,000+ in contributions**
- Exceptional attendance at National, Regional, and local meetings