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NvAHU Strategic Planning

8-12-16

2/18/17

Mission and Vision Statement



Mission and Vision Statements

- *NAHU's Mission Statement*

- NAHU advocates for our members, provides professional development and delivers resources to promote excellence.

- *NAHU's Vision Statement*

- NAHU is the preeminent organization for health insurance and employee benefits professionals.

- *CCAHU Mission:*

Goals

- Blue Ribbon Award
- Landmark Award
- Legislative Award
- Programs to Fund NvAHU



NAHU represents licensed health insurance agents, brokers, consultants and benefit professionals who serve the health insurance needs of employers and individuals seeking health insurance coverage.

ABOUT NAHU

EVENTS

CONSUMERS

LEGISLATORS/MEDIA

PROFESSIONAL DEVELOPMENT

CHAPTER CERTIFICATION PROGRAM

NAHU's Chapter Certification Program is an ongoing program that recognizes excelling chapters on a rolling basis throughout the calendar year. Recognition is based on criteria satisfaction in a variety of areas. To earn **Silver Certification**, chapters must satisfy at least six of 14 criteria as listed on the [criteria sheet](#). **Gold Certification** requires a chapter satisfy nine criteria and **Platinum Certification** is based on a chapter satisfying all 14 of the criteria.

State chapters that achieve at least Silver Certification along with all of its local chapters are recognized with the **Blue Ribbon of Excellence**. All ribbon and certification recipients are displayed on NAHU's website, acknowledged in HIU and are recognized at Annual Convention. Certification is based on activity within a 12-month period; re-certification is required annually.

NAHU tracks which criteria chapters have satisfied as well as the criteria not satisfied. To see where your chapter stands in achieving the certification, check out the most recent [Chapter Status Report](#). If your chapter has satisfied criteria and it is not reflected on the CSR, please forward the documentation to [Dimeko Shaw](#).

The CSR is updated quarterly, but don't wait to submit any missing information for your chapter. The certification is given immediately upon criteria fulfillment and with annual updates required thereafter.

Congratulations to the Blue Ribbon of Excellence chapters.

- Colorado AHU
- Idaho AHU
- Louisiana AHU
- Michigan AHU
- Missouri AHU
- Nevada AHU
- New York AHU
- Ohio AHU
- Oklahoma AHU
- Texas AHU





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President's Welcome Message

I'd like to thank all of our members for their commitment to our Professional Association. It takes everyone's participation and involvement to ensure that our industry continues to thrive in this ever changing environment. With the recent six-year anniversary of Healthcare Reform, it seems like it was only yesterday that as health insurance professionals, we wondered how we were going to fit into this new world, let alone keep up.

With NAHU's continued advocacy with legislation on behalf all licensed agents, we are able to collectively have a voice on behalf of the industry and consumers. We appreciate the participation of those who attend our annual Capitol Conference and State Day on the Hill where we are able to speak directly to our Federal and State elected officials.

NAHU's continuing education series obtained through National Conventions, Monthly Chapter Meetings, Sales Symposiums, Webinars, CE and Designation programs, and Leading Producers Round Table (LPRT) certification allows our members to reach a differentiating level of professionalism that far surpasses the non-member. Our members are the backbone of our professional association, which is why NAHU is committed to providing each member with the tools and resources necessary to promote success. NAHU collaborates with its members in hopes of providing to them the best possible support which in turn supports our

Objectives





2017 LANDMARK AWARD BY RESPONSIBILITY

CATEGORY	DESCRIPTION	RESPONSIBLE	NOTES	MAX PTS
I.	Events 1. Credentialed delegates to Annual Convention	All		x 25 pts = 75
I.	Events 2. Each additional attendee to Convention	All		x 5 pts = 50
I.	Events 3. Legislative Chair attending Capitol Conference	All		1 x 75 pts = 75
I.	Events 4. Each additional attendee to Cap Conference	All		x 5 pts = 50
I.	Events 5. Annual Regional Meeting Attendance	All		x 20 pts = 120
I.	Events 6. Membership or Retention Chair at Regional meeting	All		1 x 25 pts = 25
I.	Events 7. Membership or Retention Chair at Annual Convention	All		1 x 25 pts = 25
I.	Events 8. Chapter represented at NAHU Leadership Program at Cap Con	All		75 or 150 150
II.	Mgmt 1. Development/Publication of state bylaws	Exec Committee		1 x 25 pts = 25
II.	Mgmt 2. Development/Publication of state policies & procedures	Exec Committee		1 x 25 pts = 25
II.	Mgmt 3. Development/Publication of Strategic Plan to members	Exec Committee		1 x 50 pts = 50
II.	Mgmt 4. Annual summary report of chapter activities to members	Exec Committee		1 x 50 pts = 50
II.	Mgmt 5. IRS approved Tax-exempt status	Exec Committee		1 x 25 pts = 25
II.	Mgmt 6. Annual publication of approved state budget	Exec Committee		1 x 25 pts = 25
II.	Mgmt 7. Annual publication of approved state profit/loss financial stment	Exec Committee		1 x 25 pts = 25
II.	Mgmt 8. Incorporation papers	Exec Committee		1 x 25 pts = 25
II.	Mgmt 9. D&O Liability insurance for officers	Exec Committee		1 x 25 pts = 25
II.	Mgmt 10. Purchase of liability insurance for state events	Exec Committee		1 x 25 pts = 25
II.	Mgmt 11. 100% Board Recruitment Award	Exec Committee		1 x 100 pts = 100
II.	Mgmt 12. Perpetual State Chapter Award program	Awards		1 x 100 pts = 100
II.	Mgmt 13. Chapter Seal Certification	Awards		75, 100, 125, 150 150
III.	Mtgs 1. Hosted a State Convention/Sales Congress	Prof Development		1 x 100 pts = 100
III.	Mtgs 2. Held an annual State Leadership Conference	Prof Development		1 x 150 pts = 150
III.	Mtgs 3. State Strategic Planning Sessions	Exec Committee		50 ot 100 100
III.	Mtgs 4. Regularly scheduled Board meetings	President		1 x 10 pts = 120
IV.	Comm 1. State Newsletter Publication	Communications		x10pts 120
IV.	Comm 2. Maintain a Chapter Website	Communications		1 x 125 pts = 125

2017 LANDMARK AWARD BY RESPONSIBILITY

CATEGORY		DESCRIPTION	RESPONSIBLE	NOTES	MAX PTS
IV.	Comm	3. Active email and/or Fax Distribution to membership	Communications		25pts of 50pts = 50
IV.	Comm	4. Conducted a Member Needs Survey	Communications		1 x 50 pts = 50
V.	Leg	1. Regular legislative communications piece to all members	Leg		1 x 50 pts = 50
V.	Leg	2. Managing an active Legislative Committee	Leg		1 x 150 pts = 150
V.	Leg	3. Full or Part-time AHU State Lobbyist Program	Leg		1 x 125 pts = 125
V.	Leg	4. Membership Support of State PAC	HUPAC		10, 20, 30, 40, 50 = 50
V.	Leg	5. Membership Support of HUPAC	HUPAC		10, 20, 30 or 50 = 50
V.	Leg	6. Meet with state DOI and/or other regulatory bodies	Leg		x 25 pts = 50
V.	Leg	7. Hold a state legislative conference or "Day with Legislators"	Leg		1 x 75 pts = 75
V.	Leg	8. State-based Operation Shouts (for period 01/01-12/31)	Communications		15, 30, or 50 = 50
V.	Leg	9. Hold/attend meetings with industry colleagues/coalition partners	Leg		1 x 25 pts = 25
VI.	MemShip	1. Chartering one or more local chapters	Membership		100, 150, 200 = 200
VI.	MemShip	2. Net membership gain during 4/1/xx - 3/31/xx	Membership		250
VI.	MemShip	3a. Active Membership Campaign - One day blitz	Membership		1 x 25 pts = 25
VI.	MemShip	3b. Active Membership Campaign - Ongoing (3-6 months)	Membership		1 x 25 pts = 25
VI.	MemShip	3c. Active Membership Campaign - Recruitment materials	Membership		1 x 25 pts = 25
VI.	MemShip	3d. Active retention efforts	Membership		1 x 25 pts = 25
VI.	MemShip	4. Membership chair on monthly regional membership calls	Membership		x 10 pts = 120
VI.	MemShip	5. Retention chair on monthly regional membership calls	Membership		x 10 pts = 120
VI.	MemShip	6. Contact local chapters on follow-up retention activities	Membership		x 10 pts = 120
VI.	MemShip	7. Development New Agent Outreach Program	Membership		1 x 100 pts = 100
VII.	Prof Dev	1. Host State Education NAHU Prof Development Certification	Prof Development		1 x 100 pts = 100
VII.	Prof Dev	2. Actively promoted LPRT to members	Communications		1 x 25 pts = 25
VII.	Prof Dev	3. Compile list of speakers and publish to membership	Prof Development		1 x 10 pts = 10
VII.	Prof Dev	4. Present NAHU's prepared leadership training materials	Prof Development		1 x 50 pts = 50
VII.	Prof Dev	5. Conduct an overview of NAHU web site at chapter mtg	Prof Development		1 x 50 pts = 50
VII.	Prof Dev	6. Number of NAHU sponsored programs by chapter or members	Prof Development		25, 50, or 75 = 75



2017 LANDMARK AWARD BY RESPONSIBILITY

CATEGORY		DESCRIPTION	RESPONSIBLE	NOTES	MAX PTS
VII.	Prof Dev	7. Actively promote RHU, REBC, DIA, LTCP, CSA, CLTC Designation	Communications		1 x 50 pts = 50
VII.	Prof Dev	8. LPRT Qualifiers	All		x 10 pts = 100
VII.	Prof Dev	9. Triple Crown Winners	All		x 10 pts = 100
VII.	Prof Dev	10. Chapter Award program that honors member achievements	Awards		x 25 pts = 75
VIII.	Media	1. Appoint a Media Relations Chair	Media Relations		1 x 35 pts = 35
VIII.	Media	2. List of local media contacts	Media Relations		x 10 pts = 100
VIII.	Media	3. Media Outreach - Letters to Editor	Media Relations		x 10 pts = 200
VIII.	Media	4. Media Outreach - Op-Ed Articles	Media Relations		x 10 pts = 100
VIII.	Media	5. Media Outreach - Press Releases	Media Relations		x 10 pts = 60
VIII.	Media	6. Media Outreach - Press Hits	Media Relations		x 10 pts = 100
VIII.	Media	7. Present NAHU's "Working with the Media" PowerPoint	Media Relations		1 x 50 pts = 50
VIII.	Media	8. Assisted local chapters with promotion Health Awareness Day	Media Relations		1 x 50 pts = 50

NAHU Legislative Excellence Award

Category	Responsibility	Points Possible	Points Earned	Notes
Meetings & Events				
State: Day on the Hill Local: Legislative Day Event	Legislative	200 points		
Registered Attendees at 2009 Capitol Conference	All	25 pts ea. attendee (max 5)		
Host a chapter meeting or function that focuses on legislative/regulatory issues independent of Day on the Hill	Legislative	50 points		
Participation by Leg Chair in NAHU's events	Legislative	1 web-view teleconf. - 25 pts 2 teleconferences - 50 pts 3 teleconferences - 75 pts Advanced training - 25 pts		
Legislative Committee Activity				
Maintaining an active legislative committee	Legislative	50 points		
State: Reporting of Leg Cmte activity to Regional Leg Chair and National staff Local: Participation on State Leg Cmte	Legislative	50 points		
Interaction with State Insurance Commissioner's office (visits, letters, emails)	All	25 points		
Interaction with State Legislators on healthcare issues (visits, letters, emails)	All	25 points		
Hold/attend meetings with industry colleagues or health insurance coalition partners	Legislative	25 points		
Involvement in the formation and/or support of State Lobbyist program	Legislative	50 points		
Grass Roots Activity				
Develop grass roots network to match active members with state legislators	Legislative	50 points		
Full or part-time lobbyist program (State only)	Legislative	50 points		
Formation and/or support of State PAC (State only)	Legislative	25 points		
Members support of HUPAC	All	5% - 10 pts 6-10% - 20 pts 11-20% - 30 pts 21%+ - 40 pts		
Public Relations/Communications				
Develop local media exposure on leg. issues by press releases to newspapers, letters to editor,	Media Relations	10 points each (max 5)		
Holding press conference with local media involvement	Media Relations	25 points		
Radio/TV appearances on health care issues	Media Relations	25 points		
Quarterly legislative newsletter sent to all chapters	Communications	50 points		

NAHU Legislative Excellence Award

Category	Responsibility	Points Possible	Points Earned	Notes
Other				
Attendance at Congressional In-District Town Hall Meetings	All	10 points each (max 5)		
Other special legislative activity such as work on political campaigns or serving on committees	Legislative	10 points		
HUPAC Chair serves on Board of Directors	Legislative	50 points		
Bonus points for awards presentation	Awards	50 points		

Definitions

- LPRT – Leading Producer Round Table – based on income or commissions. Cost is
 - \$70 Leading Producer Qualifier,
 - \$95 President's Council Qualifier,
 - \$120 Eagle Qualifier,
 - \$145 Golden Eagle Qualifier,
 - \$295 Soaring Eagle Qualifier
- Triple Crown
 - HUPAC: Participate in \$12 x 12 draft program or contribute \$150 total for the 2/18/17 year

Objectives (continued)

NvAHU income making ideas

- Need a committee to meet and review ideas, for 3 fundraising events during term.

- Great News! Ken already secured the first event!

 - 3 CE Ethics class in Northern Nevada – split between IIABC, NAIFA and NvAHU

- Need more events, for just NvAHU, North and South

Recap

- Blue Ribbon Award
- Landmark Award
- Legislative Award
- Program to Fund NvAHU

What are your Goals?

