

# **Strategic Plan**

## **January 18-19, 2008**

### **Columbus, Ohio**

OAHU is in a unique position to continue to elevate the OAHU brand. There is work to be done, but a great foundation has been laid to take the organization to the next level. The new strategic plan is focused on the methodologies for developing the brand, including strategies in how the state can continue to assist the local chapters in fulfilling its members' expectations while at the same time continuing to create up-focused branding at the state level for legislative and other activities.

Significant issues loom regarding the financial situation due to changes in your relationship with CCI. It is agreed that OAHU should be looking for additional non-dues revenue. Possibilities include regular non-meeting CE topics which could be used as stand alone revenue-sharing opportunities with the local chapters to strengthen the relationship between the state and local chapters. Potential CE topics include CDHC, HSA, LTCP and other, to be developed, options. Discussion was held regarding additional professional development with DiSC training part of the mix. In addition, OAHU can generate additional revenue by selling advertising on its website to both industry and related business entities. (Re) Gaining sponsorship and membership of large GAs will help, as will engaging other associations and other non-traditional members such as P&C shops, national carriers and senior products agents. Thinking outside the box for membership will contribute to additional opportunities for program as well, as the state and local chapters serve this new segment of member. Finally, OAHU might create a New Agent Program to include training on products not be immediately visible to them, as well as tips for success and survival in the industry.

Guidance for chapter responsibilities can be found with the Silver Seal criteria, Landmark and Pacesetter Award criteria. Not every chapter can or should submit for the awards (although that is encouraged), but the awards should be utilized as guidelines in planning. Silver Seal should be attainable by every chapter as it outlines the basics for chapter focus. Sample job descriptions are attached that can be adapted for your own use.

It is reasonable that there be a close bond between the state leg council, the national leg council and the OAHU state board. It is critical that the OAHU board understand and approve any state leg message, and any national message that needs to be communicated from the state level to local chapters, the members and the public. In addition, the OAHU board believes that it needs to better understand and integrate itself into the activities of its lobbyists, which will create additional opportunities for communication with OAHU members.

In order to continue to be more responsive to its members, the OAHU board has several opportunities. Membership is a huge concern, both in growth and retention. To accomplish the new membership goal of 90%, OAHU should create a new position focused specifically on retention activities. Communication is evolving to be a major focus at the state level, and should be elevated to a board position, with direct responsibility to work with the lobbyist and your administrator to coordinate those activities. Your current CE chair

position might be expanded to include not just CE, but program and education to more broadly focus and work on the state and local collaboration. It should be noted, that none of this can be accomplished in a vacuum, and the appropriate support team should be developed at the local level as well, thus creating additional team focus and support.

As we began to look at how OAHU could be more responsive to its members, it became apparent that the relationship between OAHU and its administrators needed to be reviewed. Suggestions were made to include additional responsibilities in database development and management at both the state and local level, additional website and newsletter responsibilities, both electronic and hard copy, in conjunction with the lobbyist, leg team and local and state and local leaders. This opportunity should be well scrutinized as it will have some budgetary implications.

Next, we saw that there has been some disconnect between state, national and regional components insofar as leadership training is concerned. Discussion was held regarding where the state should fit within the matrix, and who should be doing what. This is not unusual to OAHU, but is indicative of what is happening within the larger organization. The national chapter relations committee is working with the RVPs to determine what should be done at which level, but training at the state level might realistically include job specific training for some activities including membership, leg and program, and motivational messages for experienced leaders. State training could be held at an annual state meeting or at a special Leadership Meeting to help incoming leaders to better understand his or her role in the organization, both state and national. Train the trainer for state leaders could be held at regional meetings, where local leaders could attend as well if more suitable.

Finally, as a mature organization attempting to move to its next best place this is a critical time for OAHU. Suggested tactics are just that. It is reasonable that the OAHU board spend some additional time reviewing these suggestions, and working on its own tactics to either supplant them or as an adjunct to them.

Plans are just that. Plans. I encourage you continue to explore how to do the good things that you do well, but better. But I challenge you to think more broadly in how you might continue to move beyond where you are, into a broader leadership role. Planning is a great start, but you need to maintain an ongoing review of progress in the goals you have set. I have attached a matrix to help you do so.

I wish you the best of luck as you continue your journey. Please do call me should you have questions or need anything else of me.

## **Mission Statement**

The Ohio Association of Health Underwriters exists as a resource to the local Ohio Chapters in the areas of communication, legislative advocacy, membership, leadership and position training, and shared programs.

## **Goals**

1. OAHU will develop additional communication tools to inform and educate our members and the public.
2. OAHU will continue to be recognized within the legislative, regulative and public sectors as the authority on matters of health insurance.
3. OAHU will grow its membership 20% within three years, from 789 members to 950 members.
4. OAHUPAC will have 100% participation from board and committee chairs in all chapters, growing from \$23,000 to \$40,000 in five years.

## **Suggested Tactics**

1. OAHU will develop additional communication tools to inform and educate our members and the public
  - 1.01 OAHU will revise its current website and provide updates on a regular basis, once a quarter.
  - 1.02 OAHU will provide monthly communications to its members via newsletter on legislative and other state and local activities.
  - 1.03 OAHU will develop a statewide database of members and prospects and others to communicate local and state activities.
2. OAHU will continue to be recognized within the legislative, regulative and public sectors as “the” authority on matters of health insurance.
  - 2.01 OAHU will continue to develop its relationship with external sources including the DOI, and other bureaucratic entities by the development of grassroots member contacts, meetings and other means as appropriate.
  - 2.02 OAHU will continue to focus on how the board and lobbyists can work together to further OAHU’s goals by creating stronger bond between the national leg council, OAHU leg council, the OHAU Board of Directors and the OAHU lobbyist.

3. OAHU will grow its membership by 20% within the next three years.
  - 3.01 OAHU will implement the ENGAI theory (Every NAHU Member Gets a Job).
  - 3.02 OAHU will develop members from industry-related categories, not necessarily life and health agents, including PPOs, licensing agencies and other non-traditional members.
  - 3.03 OAHU will renew its efforts to engage local large GAs for sponsorship and members
  - 3.04 OAHU will develop additional state and local collaboration for membership, programs and revenue sharing.
  - 3.05 OAHU will strive to retain members at 90%.
4. OAHUPAC will have 100% participation from board and committee chairs in all chapters, growing from \$23,000 to \$40,000 in five years.
  - 4.01 OAHU will strive for full board and committee participation in the OAHUPAC.
  - 4.02 OAHU will develop relationships with persons who are qualified as high dollar resources for the PAC, and request contributions from them.