

NAHU Strategic Plan: 2011-2015 (including committee and staff stated goals)



The National Association of Health Underwriters

America's Benefits Specialists

Who We Are

The National Association of Health Underwriters represents more than 100,000 licensed health insurance agents, brokers, consultants, and benefits professionals through more than 200 chapters across America. NAHU members provide valuable services to both business and individual consumers of health care by improving their ability to access a variety of health care and related benefits plans, and by assisting them in getting the most value from these plans after they are implemented. Because our members practice in a complicated field that requires a significant amount of expertise, they benefit from participation in a professional association that will allow them to increase their knowledge and exposure to information and services in important areas. They additionally benefit from efforts made on their behalf to preserve and improve the industry in which they practice and to improve the ability of the public to access affordable financing for their health care needs.

NAHU Code of Ethics

- To hold the selling, service, and administration of health insurance and related products and services as a professional and public trust and do all in my power to maintain its prestige.
- To keep paramount the needs of those whom I serve.
- To respect my clients' trust in me, and to never do anything which would betray their trust or confidence.
- To give all service possible when service is needed.
- To present policies factually and accurately, providing all information necessary for the issuance of sound insurance coverage to the public I serve.
- To use no advertising which I know may be false or misleading.
- To consider the sale, service, and administration of health insurance and related products as a career, to know and abide by the laws of any jurisdiction federal and state in which I practice and seek constantly to increase my knowledge and improve my ability to meet the needs of my clients.
- To be fair and just to my competitors and to engage in no practices which may reflect unfavorably on myself or my industry.
- To treat prospects, clients and companies fairly by submitting applications which reveal all available information pertinent to underwriting a policy.
- To extend honest and professional conduct to my clients, associates, fellow agents and brokers, and the company or companies whose products I represent.

NAHU Strategic Plan

Our Vision:

Every American will have access to private sector solutions for health, financial and retirement security and the services of insurance professionals.

Our Mission:

NAHU will improve its members' ability to meet the health, financial and retirement security needs of all Americans through education, advocacy and professional development.

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Strategic Goals and Objectives

NAHU's strategic goals and objectives are designed to help us achieve our vision and perform in accordance with our mission.

Goal #1-NAHU will exceed its members' expectations.

Our members are our most important asset. We must provide a level of service that is the best not just in our industry, but in any industry. When someone wants to use an example of excellence, they will think first of NAHU.

How will we do this?

- **We will treat our members as if they are our most prized possession, because they are.**

Responsibility: All Committees

2011 – Media Relations 1: Respond to member inquiries in a timely and kind fashion.

Membership Council 1: A membership recognition program will be developed and implemented.

Membership Council 2: A program for welcoming new members will be developed.

Membership Council 3: When speaking with members we will ensure each time we have taken care of the reason they are contacting us and see if there is anything else we can help them with.

2012 – Chapter Development 1: We will provide leadership training, communication, tools

- **We will be known for our exemplary service.**
 - We ask our members to rate our service at each encounter and in other ways throughout the year.

Responsibility: NAHU Staff

2011 – Meetings 1: Include service ratings in meeting evaluations

Membership 1: Send short member surveys throughout the year to rate our service and report results to committees and board of trustees.

Membership 2: Ask members with each encounter if we have met their needs.

Communications 1: Communication staff will design and send several member satisfaction surveys

- We will track and report the survey results at regular intervals.

Responsibility: NAHU Staff

2011 – Membership 1: Continue sending quarterly lapsed member surveys to non-members.

Membership 2: Develop and implement a process for surveying new members.

Membership 3: A membership satisfaction survey will be completed and the results will be reported to all national committees and the BoT.

Human Resources 1: Implement a process where a satisfaction survey can be included with a member's renewal to determine rate of satisfaction. Possibly create a website link too.

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- **We promote the value of our affinity programs through targeted marketing efforts.**

Responsibility: Membership Council (MC) & Communications Staff (CS)

2011 – MC1: Targeted marketing plans for each affinity program will be developed and implemented.

CS1: Will promote in HIU

- **We will communicate effectively with our members.**

- We will improve communications to our targeted audiences so that information gets out to the parties that need the information.

Responsibility: Media Relations (MR), Membership Council (MC), NAHU Staff

2011 – MR1: Send Media Moment through MagnetMail to track readership.

MC1: Create a membership communications schedule, track emails, better use HIU & social networking sites, have quarterly membership webinars

2012 – MR1: Engage Volunteer Committee to track and report activity

MC1: Research chat options & add certification information and additional practice areas to better focus communications

Meetings 1: Establish protocol of promoting meetings with complete detail at least four months in advance.

- Members will be alerted immediately of new tools, services, and information. If something is a new (example a tool on the website), we communicate its availability to all members in a timely fashion.

Responsibility: Chapter Development (CD), Membership Council (MC)

2011 – CD1: Utilize current NAHU communications: President's Monthly Email, Leader email, Membership Forum LinkedIn Discussion Group

MC1: Multi-communication approach will be implemented to ensure that we are reaching all of our audiences.

- We will be careful to control the number and length of messages of all types

Responsibility: NAHU Staff: Communications (CS), Human Resources (HR), Membership (MS)

2011 – CS1: Tracking the emails to vendors

HR1: Use links for each message

MS1: Membership staff will work collaboratively to ensure that messages are not conflicting with other departments.

MS2: Membership staff will develop a membership communication schedule detailing regularly scheduled emails.

MS3: Messages will be reviewed and edited to promote a consistent look and to control message length.

- We will make our website more appealing and user-friendly with pictures of leaders and staff, easy e-mail links, and information will be available through audience specific silos.

Responsibility: NAHU Staff: Communications (CS), Membership (MS)

2011 – CS1: Communication staff is working on a redesign

MS1: We will post staff pictures where appropriate.

MS2: We will do an evaluation of website content and organize it so that it is user-friendly.

MS3: We will explore ways to highlight various parts of the organization using the website.

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2012 – MS1: We will work with designers to update the look of the website so that is more appealing and information is easier to find from the homepage.

- Our website will be known for its ease of use and valuable information.

Responsibility: NAHU Staff: Human Resources (HR), Membership (MS)

2011 – MS1: We will post up-to-date legislative content and promote it to our members.

2012 – MS1: We will send out a survey to the members on the website and use the feedback to make the site easy to use.

HR1: Make use of an intranet for posting information necessary for employees.

- **We will continually work to help our members be more successful in their professional lives keeping the evolving market in mind, with the goal of positioning them as experts.**

- Make professional development and compliance education a critical element of our activities.

Responsibility: Legislative Council (LC), Professional Development (PD)

2011 – LC1: Include compliance information in weekly Washington Update

PD1: Deliver strong campaign messages via email and HIU on the importance of credentialing/diversifying during the changing climate of our industry.

PD2: Analyze our membership for the markets that they currently serve and tailor our materials to those markets.

PD3: Develop on-line courses, reference forms and a compliance corner with up to date information and forms on new laws and regulations.

2012 – LC1: Will plan a monthly calendar of compliance webinar ideas (fee charged) and offer monthly legislative update webinars (free).

- Provide a NAHU branded health reform certification course to distinguish them in the marketplace

Responsibility: Legislative Council (LC), Professional Development (PD)

2011 – LC1: Prepare course content with PDC

PD1: NAHU branded certification spring rollout, PPACA Advisory

PD2: PPACA Certification Course – Spring – distinguished in the marketplace or use as a non-dues revenue maker?

PD3: PDC and Staff are developing this course. We need to continue to work with our education partners to develop this course to insure NAHU members have the most current info possible when it is communicated to them.

2012 – LC1: Launch course with PDC

2013 – LC1: Prepare exchange certification course in consultation with PDC and state chapters

2014 – LC1: Launch state-specific exchange certification programs with opening of state-level health insurance exchanges

- Provide tools to enable members to efficiently deal with a larger number of individual market clients

Responsibility: Legislative Council (LC), Professional Development (PD)

2011 – PD1: Provide two webcasts with leading experts discussing concise action items.

PD2: Individual market clients are the most time consuming and difficult to serve. The tools and education that we endorse must address the time issue and the efficiency issue.

PD3: I don't believe NAHU has done much in this area but should develop webinars with individuals that understand this issue.

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2012 – LC1: Develop working group to identify legislative concerns and appropriate tools for members

- Expand the NAHU branded *Learning Institute* to allow for greater customization of individual libraries

Responsibility: Professional Development (PD)

2011 – PD1: Survey membership on what market/agency management areas they need the most help in.

PD2: Need to review the On-Line Learning Institute library and eliminate or update any courses that are too old for the market.

PD3: We need to expand the library of information and communicate it to our members better.

- Educate our members about value-based plan designs and their role in the market they serve

Responsibility: Legislative Council (LC), Professional Development (PD)

2011 – LC1: Develop a working group on cost containment initiatives, including ACOs, VB plan designs, etc.

PD1: National VBBP Track (same topics can be housed in the OLI)

PD2: Personally, I have mixed feelings about value-based plan designs because the premise of having ROI kick in just because the plan design has been implemented is naive. For the ROI to kick in the participants have to be willing to change their behavior. I agree that we need to provide the members with the tools of value-based plan designs but be sure that we are not advocating for something bigger than what it really is.

PD3: NAHU is in the process of developing programs in this area. We need to develop webinars and programs with quality speakers that can help our members understand the issue.

2012 – LC1: Implement WG recommendations

- Develop more customizable brochures, videos, podcasts, and other tools for our members to use with their clients

Responsibility: Media Relations (MR), Professional Development (PD)

2011 – MR1: Revamp and publicize NAHU's Media Spokesperson Database.

MR2: Successfully recruit more participants in our Spokesperson Database

PD1: Promote use of OLI w/clients and develop bite size PD tools specific to employer needs

PD2: Communicate these items in a clear and understandable method to our members.

2012 – MR1: Create brochures and other communication materials that allow members to personalize. (\$)

MR2: Promote, outside our membership the NAHU Media Spokesperson database

2013 – MR1: Create customizable PSAs, podcasts and videos. (\$)

- Transition to in-house video production

Responsibility: NAHU Staff

- **Provide guidance on health related compliance and tax issues**

- Provide up to date information on regulatory changes on a proactive basis as well as on demand

Responsibility: Legislative Council (LC), Professional Development (PD)

2011 – LC1: Provide compliance information (i.e., links to new guidance etc) in weekly WU

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PD1: Compliance Corner plus additional training through PD days at Convention.

2012 – LC1: Overhaul compliance materials on NAHU website

LC2: Develop specific compliance tools for members to use with employer clients

PD1: PPACA Certification.

- Provide personalized compliance assistance

Responsibility: Legislative Council (LC), Professional Development (PD)

2011 – PD1: Assign PDC point of contacts specialized in compliance w/Leg Council. Provide membership with contact information on website and email notification.

PD2: We need to be careful about this. We don't want to be accused of giving out old information. We should make the promise of keeping the compliance corner links up-to-date and let the member do further research on their own

2013 – LC1: Hire dedicated compliance staff to provide personalized assistance

- Consider fee for expanded service

Responsibility: NAHU Staff: Human Resources (HR)

2011 – HR1: Determine the needs of the membership

2012 – HR1: Implement a strategy for developing and rolling out the determined programming.

- **Help our members develop more consultative practices**

- Determine definitive licensing and fee regulations as they apply to health insurance and provide state by state guidance for members

Responsibility: Legislative Council (LC)

2011 – LC1: Develop chart of state based laws/regulations

- Work with NAIC on the crosswalk between rebating laws and fees

Responsibility: Legislative Council (LC)

2011 – LC1: Meet with appropriate regulators to ensure NAIC committee

2012 – LC1: Work with NAIC on model law action in 2012

- Help members evaluate the option of whether they should charge fees and if so, transition to either a commission plus fee basis or fee only structure

Responsibility: Legislative Council (LC), Professional Development (PD)

2011 – PD1: OLI-catalogue category targeting: Greater demand for transparency; Consumers demand for value; Competition; Definition of Small Group

2012 – LC1: Webinars on fee-based billing

- **Enable and equip our members to increase their practice diversification**

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- Provide tools to assist with total needs analysis

Responsibility: Legislative Council (LC), Professional Development (PD)

2011 – PD1: We need to explore collaborative partners who have developed effective fact-finding tools so that we can offer them through Non-Dues Revenue.

2012 – LC1: Evaluate what legislative/regulatory issues we should cover to address needs of members serving different markets

- Provide information on characteristics and techniques associated with new markets including smaller or larger markets, or government plan options

Responsibility: Legislative Council (LC)

- Provide information on the use of various lines of coverage in advanced settings

Responsibility: Legislative Council (LC), Professional Development (PD)

2011 – LC1: Work with PDC on 400-level course work/webinars

PD1: Consult with the IFEBP for the CEBS designation. CEBS addresses advanced sales settings including buy-sell, tax planning, and deferred compensation arrangements.

- Provide detailed information on contract analysis of ancillary lines

Responsibility: NAHU Staff

- **Enable our members to work with non-traditional competitors who may be enrolling or facilitating enrollment in health insurance coverage**

Responsibility: Legislative Council (LC)

2012 – LC1: Encourage all state chapters to begin developing relationship with their state Medicaid directors in par with their Insurance department relationships

LC2: Begin outreach to Medicaid plan groups and state Medicaid director association

- Form alliances to find common ground

Responsibility: NAHU Staff

- **Enable our members to work effectively with their state exchange**

Responsibility: Legislative Council (LC)

2011 – LC1: Exchange coordinators group

2012 – LC1: Monthly exchange calls

LC2: Update NAHU exchange recommendations based on HHS guidance to be released in June 2011

LC3: Lobby HHS/NAIC/States on the role of agents/brokers and navigators

- Develop state by state exchange certification courses

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Responsibility: Legislative Council (LC), Professional Development (PD)

2011 – PD1: PPACA, LMT, Pam Mitroff meeting to discuss timelines for final legislation

2013 – LC1: Prepare exchange certification course in consultation with PDC and state chapters

2014 – LC1: Launch state-specific exchange certification programs with opening of state-level health insurance exchanges

- **Enable our members to provide expert consultation in sophisticated wellness environments**

Responsibility: Professional Development (PD)

2011 – PD1: Develop a Wellness track for the OLI

- **Our national, state and local meetings will offer more valuable practical information as well as provide new ideas, trends, and business motivation**

Responsibility: Legislative Council (LC), Professional Development (PD)

2011 – PD1: Must continue with benchmark surveys to be sure NAHU is trending with the brokers and their markets.

2012 – LC1: Wellness track for CC 2012

- **We will recognize our most successful members with pride and in such a way that their achievements will be visible to their clients and peers.**

- Promote LPRT in new places and ways

Responsibility: Leading Producers Round Table (LP), Media Relations (MR)

2011 – LP1: Working with Corporate Partners to promote and acknowledge the program.

LC2: Working with to determine other industry low-cost options

MR1: Update LPRT press releases on website.

2012 – LP1: Work with designer to develop add/recognition in non-typical industry publications

- Promote Soaring Eagle as a unique recognition in our industry

Responsibility: Leading Producers Round Table (LP), Media Relations (MR)

2011 – LP1: Created a brochure that has been posted on NAHU's website and distributed at industry meetings.

2012 – MR1: Create a Soaring Eagle brochure (\$)

- Explore opportunities outside of the industry for promotion and recognition.

Responsibility: Media Relations (MR)

2011 – MR1: Seek opportunities for Janet and BoT members to be recognized for their exemplary service.

- Explore options to recognize service to NAHU

Responsibility: Awards (AW), Media Relations (MR)

2011 – AW1: Look into the option of promotion of DSA and other individual award winners in HIU

MR1: Create a new individual "media superstar" award to be given out during NAHU's awards program.

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2012 – AW1: Will look into other industry magazines for potential to promote the individual awards winners.

MR1: Present the first “media superstar” award at convention

- **Our state, local, and national leaders will function effectively as a team dedicated to the service of our members.**

- Information will flow both ways

Responsibility: Chapter Development (CD), Membership Council (MC)

2011 – CD1: The chapter surveys the committee is doing will give us a good understanding of what the next steps are for 2012 and beyond

MC1: Invite committee chairs from the chapter development committee to be a guest on the membership committee call on an ongoing basis.

Include additional committee members on an as needed basis.

MC2: Membership and Chapter Development will work collaboratively to achieve membership growth and build optimum chapter programs with a focus on struggling chapters.

MC3: Quarterly webinars will be held for chapter leaders that will focus on specific items that are important for them to know at that time.

MC4: The committee will work collaboratively with the Awards Committee to ensure that awards criteria are meeting the goals for membership and chapter development.

- We will create a means for committees and leaders to communicate more effectively

Responsibility: Chapter Development (CD), Membership Council (MC)

2011 – CD1: Using the Membership Forum on LinkedIn. Need to strategize about keeping up the communications and interaction.

CD2: Will develop an outline of regular, focused communication among the national committees and others (BoT, etc.) that fosters mutual understanding of our various projects and goals in order to best support efficient chapter operations

MC1: The membership council members will hold monthly regional membership calls.

2012 – MC1: Create additional online discussion groups, similar to the Membership Forum.

MC2: research various chat options as an additional communication method for NAHU committees and leaders.

- All leaders speak with one voice to ensure a consistent message for our members.

Responsibility: Chapter Development (CD), Media Relations (MR), Membership Council (MC)

2011 – CD1: Continued interaction with the Membership Forum

MR1: Continually update and promote our media talking points.

MC1: National and state membership leaders will communicate with each other on a regular basis.

MC2: The national membership chair will work closely with the board liaison.

MC3: Membership will serve as the cheerleaders for the association and help to ensure the message is clear and shows the member value.

MC4: The national membership chair will have weekly meetings with the membership staff liaison.

2012 – CD1: Develop leadership curriculum

2013 – CD1: Leadership curriculum implemented

- Committees will use new technologies to make their business both more efficient and more personal (Skype, for example.)

Responsibility: NAHU Staff: Membership (MS)

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2011 – MS1: The membership staff will explore the MMT using Skype for the monthly conference call.

2012 – MS1: Membership staff will explore the MC using Skype for the monthly conference call.

MS2: Create a protected online work group specifically for the membership committee to share working documents and membership plans for committee projects.

- Create programs that local chapters can use on-line, etc.

Responsibility: Chapter Development (CD)

2012 – CD1: Create programming that addresses current concerns and can be located on NAHU's website for 24/7 use

- **We will create an atmosphere for business and professional networking that sets the standard for others.**

- We will use new technology to increase our effectiveness in this area.

Responsibility: Chapter Development (CD), Membership Council (MC)

2011 – CD1: Using the Leadership Forum to get officer discussing issues and successes

MC1: The Find an Agent Directory will be expanded to include pertinent certifications.

MC2: Special networking groups for subgroups of membership, such as LPRT.

MC3: Special networking groups, events and professional development for pertinent certifications.

MC4: We will market NAHU's career service center and create enhancements to make this benefit more valuable to our members.

2012 – MC1: Dedicated staff person to answer compliance issue questions.

- **More advanced training, high-level, 400+ programming and talk to others at the same level.**

Responsibility: Legislative Council (LC), Professional Development (PD)

2011 – PD1: This is paramount to attracting and retaining the bigger brokerage houses as members. Continue to associate with Assurex to learn what the bigger houses are doing and needing,

2012 – LC1: Advanced track at CC 2012

- **We will do all of this while being careful stewards of our resources at all levels, so that we may continue to provide the services our members find so valuable.**

Responsibility: NAHU Staff: Communications (CS), Human Resources (HR), Membership (MS)

2011 – CS1: Communication staff is evaluating all HIU vendors to ensure that we're getting the best deal possible.

MS1: Membership staff will carefully monitor the departmental membership budget.

2012 – MS1: Membership staff will prepare a budget for expected expenses as well as monies needed to move the membership area forward in technology.

HR1: Offer training for staff so we may be better prepared to assist our members at our highest potential

- **Attract members who join for national benefit.**

Responsibility: Media Relations (MR), Membership Council (MC)

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2011 – MR1: Publicize nationwide editorial success on a regular basis.

MR2: Recognize successes of our chapters in local media

MC1: We will explore advertising in relevant trade publications in order to attract new NAHU members.

MC2: Target Corporate partners, including HIU promotion, Soaring Eagle and Health Reform updates.

MC3: Speak with corporate partners or companies that have 50 or more members about doing a payroll deduction for NAHU dues.

MC4: Explore corporate partners providing membership dues dollars to their employees based on reaching a particular production level.

2012 – MC1: Explore benchmarking.

- **Create virtual chapters**

Responsibility: Chapter Development (CD)

2012 – CD1: Research the process and create a project outline

CD2: If a need is determined, implement virtual chapters

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Goal #2-A significant number of health insurance professionals will be NAHU members.

*Strength is in numbers, and that is no exception for our industry. Non-members of NAHU do not have access to the same benefits NAHU members enjoy. It is our obligation to do everything in our power to expose those in our profession to the highest possible ethical standards and business services so that the public receives the best possible service from our industry. We must hold our profession to the same standards of other professionals, such as doctors, attorneys, and CPAs who are expected to join their professional associations.
NAHU will be a “must join” association for those in our profession.*

How will we do this?

- **We must effectively communicate the value of membership to both our current and future members.**
 - We will be known as the “go-to” virtual place on the web for agents and brokers.

Responsibility: Media Relations (MR), Membership Council (MC)

2011 – MR1: Identify purpose of website, member needs and message.

MR2: Increase member communication about MR tools and how to use them

MC1: Targeted promotional pieces, which include testimonials.

MC2: Asking our partners/sponsors to market to their agent base.

MC3: Create password protected sections on the website that address our member’s most important needs, like the Compliance Corner, which could include recordings, white papers, charts, analysis, etc.

2012 – MR1: Design brand, including logo, templates and letterhead (\$)

2013 – MR1: Full website redesign (\$)

- We will increase our presence at industry meetings

Responsibility: Legislative Council (LC), Media Relations (MR), Membership Council (MC)

2011 – MC1: Research opportunities to acquire comp registrations and exhibit space at trade events.

MC2: Working with HR/Payroll Associations.

MC3: Increase our speaking engagements within industry meetings to increase exposure to NAHU.

2012 – LC1: Revamp legislative section of website

MR1: Sponsor member-run booth at one meeting (\$)

MC1: Research and budget for additional sponsorship opportunities at industry events.

2013 – MR1: Sponsor member-run booth at two meetings (\$)

- We will increase advertising in trade publications

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Responsibility: Media Relations (MR)

2012 – MR1: Design new membership-focused and issue-driven print ads (\$)

2013 – MR1: Fund ad co-op program for chapters (\$)

MR2: Focus on emerging chapters

- We will do a better job promoting our significant accomplishments in various venues.

Responsibility: Media Relations (MR)

2011 – MR1: Promote press hits and editorial placements

- Leading federal, state and local legislation

Responsibility: Legislative Council (LC)

2011 – LC1: HR 1206

2012 – LC1: Advancing HR 1206

- **We must engage those members, and increase significantly the number of members we have as well as ensure that those members who join our association continue to be a part of NAHU.**

- Our goal will be a 5% net increase in membership in five years.

Responsibility: Membership Council (MC)

2011 – MC1: Assign national member committee members to “blocks” of new members.

MC2: Work with the Young Agents to create a mentor program, so those new to the industry and NAHU will have someone to guide them through their first year

MC3: A revised and targeted new member orientation program and retention program will be developed in order to increase retention for this group of members,

2012 – MC1: Work closely with local chapters and carrier partners to obtain prospect lists in order to conduct NAHU member recruitment.

2013 – MC1: Increase our efforts with member retention with the goal of achieving 85% retention by 2013.

- We will increase the percentage of members who are practicing agents and brokers.

Responsibility: Legislative Council (LC), Membership Council (MC)

2011 – MC1: Targeted marketing efforts.

MC2: Market through partners/sponsors.

MC3: Continue our efforts through our corporate partners.

MC4: Develop a corporate membership that will appeal to agencies who wish to have employees as members

- We will make membership in NAHU so valuable to both our members and regulators that membership in NAHU is required for licensing.

Responsibility: Legislative Council (LC), Membership Council (MC)

2011 – MC1: Utilize the “Health Care Reform” certification and “Exchange” certification to show how NAHU members excel in the marketplace.

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2012 – LC1: not sure this is a realistic goal

MC1: Research possible membership requirements.

MC2: Research membership in NAHU counting as continuing education for licensing renewal.

- We will ask existing and new members to agree to our Code of Ethics.

Responsibility: Membership Council (MC)

2011 – MC1: The new member application process and the online renewal process will be expanded to include a check box for our code of ethics.

- We will be the leading sponsor of ethics education

Responsibility: Professional Development (PD)

2011 – PD1: We need to start with our code of ethics.

PD2: We need to incorporate the E&O insurance carrier – claims that they have seen and make a course out of it.

PD3: We need to advertise our ethics training to the NAIC and AHIP.

- Explore corporate membership

Responsibility: Membership Council (MC)

2011 – MC1: Explore giving discounts to companies that cover multiple employees – Corporate Membership

MC2: Corporate membership benefits could include additional perks such as advertising for job openings, additional CE opportunities and discounts on NAHU certifications.

2012 – MC1: Give recognition on local websites, meetings and HIU to the companies that sponsor memberships.

- Explore other membership categories

Responsibility: Membership Council (MC)

2011 – MC1: Corporate Membership

2012 – MC1: The national membership committee will explore a Young professional/agent membership category with the goal of increasing membership with new agents and brokers.

- We will explore reaching out to international members as greater globalization occurs.

Responsibility: Media Relations (MR), Membership Council (MC)

2012 – MC1: Research insurance systems in global market in order to determine possible membership opportunities.

MC2: Seek out knowledgeable international professionals that can speak to our members on what they are experiencing and provide information that can be used for legislative purposes

- **We must provide national, state and local chapter services of the highest quality, and leadership training that will help our members not only in their chapter activities, but in their professional endeavors as well.**

- We will explore new ways to offer chapter services in order to meet the needs of more of our members.

Responsibility: Chapter Development (CD)

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2012 – CD1: Based on the information garnered by the chapter we will be able to identify the services our chapters need.

CD2: Identify a leadership curriculum, timing and potential programming

- We will provide new assistance for small or struggling chapters to help them increase their effectiveness.

Responsibility: NAHU Staff: Leadership Services (LSS), Membership (MS)

2011 – MS1: The Director of Membership will work closely with struggling chapters on their membership issues, which will involve providing guidance and membership tool development.

2012 – LSS1: Provide Chapter Assistance program as detailed in dues increase; could include tools for chapter mentorship, executive director selection, etc.

- We will create virtual on-demand training for officers and volunteers to better train and enhance their ability to serve both the members and their clients.

Responsibility: Chapter Development (CD)

2012 – CD1: Develop a leadership curriculum.

CD2: Create templates for chapter leadership; such as running a symposium, running a board meeting, understanding parliamentary procedure, etc.

- Help them prepare and/or survive the changes

Responsibility: Chapter Development (CD)

2011 – CD1: Develop an outline of the chapter assistance program (aka Chapter Lite). This program will identify alternative chapter structures for chapter struggling with leadership issues.

- Evaluate sustainability of chapters, new and existing

Responsibility: Chapter Development (CD)

2011 – CD1: Complete chapter survey process for identified struggling chapters and see what their needs are

2012 – CD1: Develop and implement programming/tools identified in the chapter survey

- Develop a mentor program for chapter leaders

Responsibility: Chapter Development (CD)

2011 – CD1: Develop a program outline to determine what is involved with a mentoring program.

- **To reach all who need to be reached, we will partner with insurance carriers, other associations, business groups, and others to ensure that our message is heard.**

- We will seek out opportunities to speak to carrier sponsored groups about NAHU issues and the value of our organization.

Responsibility: Legislative Council (LC), Media Relations (MR)

2011 – LC1: AHIP Exchange meeting

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MR1: Build partnerships by utilizing member contacts

2012 – MR1: Provide increased materials for partners such as bulk discounts on brochures, individualized meeting invites and education resources.

- We will participate in industry meetings to increase our exposure

Responsibility: Legislative Council (LC), Media Relations (MR), Membership Council (MC)

2011 – MR1: Identify potential industry meetings

MC1: Try to increase speaking engagements that focus on health care reform or participate on expert panels.

MC2: Industry meetings – covered in another section.

2012 – LC1: Participate in NAIC, NCSL, NCOIL, State Medicaid Directors

MR1: Member-run booth at one meeting

MC1: Research ways to get in front of groups at various regional sales meetings , broker meetings, etc.

2013 – MR1: Member-run booth at two meeting

- **We will pay special care to encouraging diversity in ethnicity, gender, age, and practice specialty and will welcome and embrace their participation in NAHU.**

- We will reach out through our advisory groups and other means to people with narrow practice areas to determine needs and concerns.

Responsibility: Legislative Council (LC)

2012 – LC1: Working group to determine legislative/regulatory issues that need to be covered for members serving different markets

- We will develop practice area specific e-newsletters.

Responsibility: Legislative Council (LC)

2012 – LC1: Compliance newsletter

- We will reach out to our corporate partners to increase the number of members who practice in larger agencies.

Responsibility: Membership Council (MC)

2011 – MC1: Work with the Young Agents to increase visibility and membership in younger agents.

MC2: Work with Young Agents on the Mentor Program that could be tailored to focus on certain groups or get certain types of members involved.

- Create internships and mentor programs for agents to be

Responsibility: Legislative Council (LC), Membership Council (MC), Professional Development (PD)

2011 – MC1: Membership Committee will work with the Young Agents committee to develop and implement the programs.

PD1: Target who are the Jr. Colleges and Jr. Achievement organizations able to make an impact

2012 – LC1: Blog?

PD1: In keeping with the Young Agents outreach, colleges and universities should be contacted by our members who have influence to start curriculum in these settings

PD2: Host multiple webcast outreach campaigns that invite college administrators

NAHU Strategic Plan: 2011-2015 (including committee and staff stated goals)

- **It is critical that the public be aware of the value that agents, brokers, and consultants bring to them. We will explore new ways to increase that awareness and better utilize technology to reach more people in different ways.**

- This will require a significant commitment to paid advertising and social media.

Responsibility: Media Relations (MR)

2011 – MR1: Identify key messages to promote and target media outlets

2012 – MR1: Produce print ads and radio/TV campaign (\$)

MR2: Secure media placements. (\$)

MR3: Implement Social Media policy and tasks with committee.

2013 – MR1: Reestablish ad co-op program

MR2: Focus on emerging chapters

- Using social media to the fullest

Responsibility: NAHU Staff: Communications (CS), Human Resources (HR), Membership (MS), Meetings (MT)

2011 – CS1: Communication staff is increasing NAHU's presence on Facebook, Twitter and LinkedIn

HR1: Promote the social media we are using and be sure to have up-to-date information available

MS1: Membership staff will post membership information on an ongoing basis on all NAHU networking sites.

MS2: We will coordinate communications for all departments using social media.

MS3: We will determine the best communications process based on the message.

MT1: Create a convention Facebook page

2012 – HR1: Stay ahead of the curve with social media

MS1: Membership staff will research the addition of hosting additional social media platforms for subgroups of members.

NAHU Strategic Plan: 2011-2015 (including committee and staff stated goals)

Goal #3- NAHU will be known as a leader in industry and public policy forums.

NAHU is known as an industry leader, thought leader, and public-policy expert, but we must increase our visibility even more. We will increase our media exposure at all levels with a goal of significant recognition of the NAHU “brand.” We will bring our message and expertise to more legislators, regulators, and opinion leaders than ever before, including creating a presence in the global health economy. We will be the “go to” organization for accurate, reliable, and truthful information.

As a result, the public will KNOW and value the role of agents, brokers, and consultants.

How will we do this?

- We will continue to play a leading role in legislative and regulatory activities that impact our members and their clients at both the national and state level.
 - Monitor and help modify federal or state rules that prevent our members from operating efficiently in the changing health insurance market.

Responsibility: Legislative Council (LC)

2012 – LC1: Regular meetings with HHS, DOL, IRS/Treasury

LC2: Improve coordination with state insurance commissioners

- Ensure that state laws that prevent list billing are removed to allow members to efficiently deal with individual buyers through their employers in addition to traditional small employer groups.

Responsibility: Legislative Council (LC)

2012 – LC1: Work for development of NAIC model

- Repeal or modify portions of PPACA that increase the cost of coverage.

Responsibility: Legislative Council (LC) 2011 – LC1: 1099 Repeal

2012 – LC1: CLASS ACT Repeal

- Repeal or modify portions of PPACA that reduce our members’ ability to serve their clients.

Responsibility: Legislative Council (LC)

2011 – LC1: HR1206

2012 – LC1: Advance HR 1206 or obtain regulatory solution

- Ensure that employers continue to be the leading place where people obtain their health care coverage.

Responsibility: Legislative Council (LC)

NAHU Strategic Plan: 2011-2015 (including committee and staff stated goals)

2012 – LC1: Work on repeal of Wyden voucher language, work on legislation to allow waivers for subsidies to be used in all markets in 2014

2013 – LC1: legislation to allow waivers for subsidies to be used in all markets in 2014

- Repeal or modify portions of PPACA that discourage employer participation.

Responsibility: NAHU Staff

- **Play a significant role in the development of state exchanges and to have ensured that our members are able to participate profitably in them**

Responsibility: Legislative Council (LC)

2011 – LC1: Model Act

LC2: Exchange coordinators group

2012 – LC1: Develop concrete strategy for member assistance based on outcome of 2011 legislative sessions and upcoming HHS guidance on exchange development

- Ensure that subsidy eligibility does not preclude the ability to use an agent or broker

Responsibility: Legislative Council (LC)

2011 – LC1: This is already in PPACA

2012 – LC1: Ensure that PPACA requirement

- **Work towards control of the cost of health care itself**

Responsibility: Legislative Council (LC), Media Relations (MR), Professional Development (PD)

2011 – LC1: New working group on cost containment/acos/VB plan design

MR1: Wellness Works promotions

PD1: NAHU should study all states for this type of anti-trust legislation and defeat it based on the fight for transparency of the cost of health care itself.

2012 – MR1: Develop WW education kits for members (\$)

MR2: WW op-ed series

PD1: The PDC can develop a course on the cost of health care as a NDR project.

- Work towards greater transparency in health care costs

Responsibility: Legislative Council (LC)

2011 – LC1: New working group on cost containment/acos/VB plan design

- **The NAHU “brand” will be recognized and sought out by consumers.**

Responsibility: Media Relations (MR)

2011 – MR1: Identify purpose of brand, member needs and message

2012 – MR1: Design new logo and create new templates and letterhead (\$)

NAHU Strategic Plan: 2011-2015 (including committee and staff stated goals)

2013 – MR1: Full website redesign (\$)

- We will work with reporters to gain greater recognition through unpaid media.

Responsibility: Media Relations (MR)

2011 – MR1: Recruit new media spokespeople

2012 – MR1: Promote Media Spokesperson Database

MR2: Create new webinar on building relationships with reporters

- We will use paid advertising to complement our unpaid efforts.

Responsibility: Media Relations (MR)

2012 – MR1: Produce print ads as well as a radio/TV media campaign (\$)

- We will update our website and communication materials to reflect a more modern look.

Responsibility: NAHU Staff: Communications (CS), Human Resources (HR), Membership (MS)

2011 – CS1: Communication staff is working on a website redesign

MS1: membership staff will review/audit the membership sections of the NAHU website, ensuring that only relevant and pertinent information is posted.

2012 – HR1: Work with vendor(s) to update look of site and modernize functions.

- **We will have a Capitol Hill “presence”**

- We will have a DC office, high visibility, and significantly more staff members

Responsibility: NAHU Staff

- **We will use both traditional and innovative technology that will help us send our message to a broader audience.**

- We will place significant emphasis on social media and virtual technology.

Responsibility: NAHU Staff: Communications (CS)

2011 – CS1: Communication staff is investigating an NAHU “app” and texting system for Convention updates

- **We will build partnerships and coalitions with outside organizations in order to better promote our vision.**

- We will explore coalitions with non-traditional coalition partners.

- **Responsibility:** Legislative Council (LC)

2012 – LC1: Work to build relationships with the Medicaid plans

LC2: Develop state-level coalition network

- **While working with others and encouraging their efforts, we will recognize that our primary strength lies within, and in keeping with that knowledge, we will increase our grassroots efforts and our involvement in political campaigns.**

Responsibility: HUPAC (HP), Legislative Council (LC)

NAHU Strategic Plan: 2011-2015 (including committee and staff stated goals)

2012 – HP1: Increase our in-district contributions during the 2012 cycle

- We will increase the sophistication of our grassroots tracking

Responsibility: Legislative Council (LC)

2012 – LC1: Develop grass tops database

- We will increase the size and effectiveness of our PAC

Responsibility: HUPAC (HP), Legislative Council (LC)

2011 – HP1: Survey similar PACs for best practice ideas

HP2: Renegotiate stakeholder contract

HP3: Explore options for fundraising support vendors

2012 – HP1: Renegotiate stakeholder contract

LC1: Promote PAC giving at chapter events

2013 – HP1: Bring HUPAC operations in-house to allow for the collection of contributions with dues payments

- **Our involvement in the political process will be not only financial, but also one of providing human capital to politicians and policymakers who are making important decisions and recommendations.**

Responsibility: HUPAC (HP), Legislative Council (LC)

2011 – LC1: Coordinated approach to in-district work periods to encourage member visits to congressional offices/town hall meetings

- We will be the source of research that can be used by policymakers

Responsibility: Legislative Council (LC)

2012 – LC1: Revamp website to make additional legislative information available to members and policymakers in a more organized/user-friendly way

- **We will engage our members in these efforts, and help them better understand their roles and responsibilities as constituents and citizens, as well as their unique ability to further the development of private sector financing of health care.**

Responsibility: Legislative Council (LC), Media Relations (MR)

2012 – LC1: Training session at CC 2012

MR1: Promote a new media outreach campaign each year such as Operation Shout, LTEs, enrollment events, fundraisers and Day on the Hill

- We will take steps to ensure that our members are personally active in the political process both within and outside of NAHU.

Responsibility: Legislative Council (LC)

2012 – LC1: Provide detailed information to legislative leaders about campaign involvement opportunities

These goals, objectives, and tasks will help us to strategically align ourselves and achieve our vision and mission. Our plan will be reviewed annually to assure that it continues to meet the most important needs of our membership.