## ChapterHighlights_cover 03 MV.jpgInsertNahuLogo.png For Reference/Rules of Thumb:

INSERT CHAPTER NAME HERE

* This Chapter Yearly Highlights Report is a template for all chapters. NAHU has provided this designed, structured format with possible sections relevant to each chapter. Each chapter is responsible for inputting all information to customize the report based on the chapter’s accomplishments for the year. Each chapter is also responsible for printing, uploading electronically and distributing the report.
* NAHU’s 2018 Yearly Highlights is a great tool to use for reference when creating your chapter’s version: <https://nahu.org/resources/promote-yourself/media-tools/chapter-yearly-highlights>.
* Each section should contain bullets of all information the chapter would like to highlight.

## Delete this page when you are finished.

# Introduction

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Best Practices #

[In this section, provide a general, logistical overview of what/who your chapter is. This information would normally stem from the “About Us” or “About XAHU” page on your chapter website. It should also include your chapter’s mission, vision, possibly a quote from the chapter president and any other relevant information. Providing concise details of this year’s strategic plan is also encouraged. Adding the chapter board roster along with photos (if applicable) is optional.]

## A Year in Review

[Each section listed below may include bulleted details of accomplishments, activities or initiatives made within the current year.]

* Legislative
* Health Underwriters Political Action Committee (HUPAC)
* Membership
* Charitable Outreach
* Professional Development
* Leading Producers Round Table (LPRT)
* Chapter Awards
* Media – Social Media – Communications
* Meetings – Conferences
* Sponsors
* Best Practices for Fellow State Chapters

## LEGISLATIVE

* Priority Bill list/List of Issues
* Accomplishments:
  + Any state or federal accomplishments that affect your chapter
  + Local Hill visits, political meetings, briefings, hearings, coalitions meetings, etc.
  + Substantial movement on a piece of legislation
  + Legislative and regulatory activities
  + Policy documents
  + White papers
  + Position papers
  + Comment letters
  + Grassroots efforts (lists on specific issues)
  + Coalitions joined
  + Testimonies
* Travel to other Chapters or Industry Groups

## HEALTH UNDERWRITERS POLITICAL ACTION COMMITTEE (HUPAC)

**Description:** [Explain the goals of HUPAC and what it means for your state to receive those contributions.]

* State PAC efforts:
  + Total contributions of the current year and a comparison to its increase from the previous year
  + Total amount of contributions that were disbursed to members of Congress
  + Efforts on how the PAC is raising money for the administrative and candidate funds
* Candidates receiving funds in your state
* Where the funds are going
  + If there is a candidate in your state receiving HUPAC funds, you should mention it in your newsletter so your members in your chapter know where some of the funds are going to.

## MEMBERSHIP

* New members:
  + Can be sectioned by month and name your members either by local chapter or their name.
  + The average retention rate for the year
* Efforts to increase membership
  + You can break this up by month and name your members either by local chapter or their name.
  + Number and type of membership campaigns
  + Number of events, promotional materials, etc., relative to membership recruitment

## CHARITABLE OUTREACH

* Number and type of charitable outreach initiatives accomplished
  + Community events
  + Voluntary efforts
  + Fundraisers
* For each event, describe:
  + What type of event it was
  + How it went
  + If the goal was met
  + Any major highlights/ recognition
* Number of donations or funds received
* Types of materials created or distributed for events (brochures, videos and flyers)

## PROFESSIONAL DEVELOPMENT

* Number and type of Certification Courses complete by chapter members
* Number of Certification Courses your chapter hosted
* Number of Compliance Corner webinars attended and/or hosted
  + How many of your chapter members attended
  + What were the topics of each webinar
* Lists any other educational efforts such as:
  + Training models
  + Specific discounts offered
  + Workshops

## LEADING PRODUCERS ROUND TABLE (LPRT)

* Highlight which categories of top producers fits with your chapter:
  + Soaring Eagle, Golden Eagle, Eagle, President’s Council or Leading Producer
* Highlight which categories of qualifiers fits with your chapter:
  + Lifetime and/or producing level

## CHAPTER AWARDS

* Highlight the number of:
  + Name the award and who received it and an explanation of why they received the award
  + If your chapter is was eligible, within the current year, for the chapter certification program, if your chapter is certified and what criteria were met (silver, gold, or platinum).

## MEDIA – SOCIAL MEDIA – COMMUNICATIONS

* Highlighting the number of:
  + Press releases and media advisories
    - # of press releases and media advisories distributed, what topics were written about, etc.
  + Social media
    - Social Media Analytics (examples below)
      * Facebook: (# of new Likes, shares, comments, link clicks, reactions, impressions, reach, etc.)
      * Twitter: (# of new Followers, profile visits, retweets, link clicks, impressions, engagement rate)
      * LinkedIn: (# of new Followers, posts views, profile views, searches appearances, etc.)
    - Social Media Campaign implemented and its engagement
    - Photos of popular Tweets/Posts from each platform
  + Number of press hits
    - Can be sectioned by print, online and broadcast hits
    - Highlight 5-10 of the biggest top-tiered outlets and the various issues that we coverage
  + Newsletters (total # throughout the year)
    - Open rates, links clicked, etc.

## Meetings – Conferences

* Highlight each event, board & regional meeting, conferences, etc. that occurred within the year.
  + Describe the main topics discussed
  + Names of speakers per event and topics of speeches
  + List all panels, panelists and topics
  + Lists of any lobbying efforts, Hill visits or excursions embarked on
  + Attendance rate of each
  + Success rate – Was the goal met?

## SPONSORS

* List the names of sponsors from each event for recognition

## BEST PRACTICES FOR FELLOW STATE CHAPTERS

* Explain the successful efforts that have been used throughout the year to assist members and stay active within their chapter
* New methods on how members can continue to be active