

STRATEGIC PLANNING MEETING  
2021-2022 BOARD YEAR

**Angela  
Dubay**  
PRESIDENT

# WASHINGTON ASSOCIATION OF HEALTH UNDERWRITERS

# Our Mission



The Washington Association of Health Underwriters promotes the highest level of professional and ethical conduct amongst its membership.

We deliver education, public policy information, and policy recommendations to our members.

In addition, we advocate consumer choice, and accessible and affordable quality health care for our communities.



**WHAT IS OUR VISION?**

# We want to be a valued and trusted partner for our industry



## How?

Provide timely, valued and engaging information by creating and delivering dependable communication to our membership through multiple channels

*Demonstrating our value will help attract and retain members and elevate our presence in the insurance industry*

# We want to provide industry professionals with growth opportunities



## How?

Develop an Emerging Leaders program to identify and mentor the next leaders in our industry and promote engagement in Health Underwriters.

*In order to keep delivering consistent value to our members, we need to engage and develop the future leaders of our Association.*

# We want greater partnerships between our regional, state, and local Associations



## How?

Develop an annual (or bi-annual) 360° Round Table Leadership event.

Bring together Regional, State and Local Association leaders, working together and in breakout Committee teams, to develop and share best practices and create new ideas to engage and provide value to our membership.

*By developing stronger relationships between our Regional, State and Local Associations we create more dynamic, engaged teams and provide greater resources and opportunities to our membership.*

# THE PLAN



A CUNNING PLAN

I have one



# 3-YEAR STRATEGIC PLAN



# 2020-2021 – Mary Pierce, President

- Launch newsletter, leverage LinkedIn and website
- Facilitate mentoring meetings with state and local committee chairs
- Support creation of new Membership/Professional Development Committee: Emerging Leaders Program
- Plan for in-person 2021 State Symposium, have a Plan B for virtual delivery
- Maximize membership participation in Day on the Hill, Capital Conference and National Convention
- Support Triple Crown achievement for President, President Elect, Treasurer, Legislative Chair, Membership Chair, Retention Chair and Professional Development Chair

# 2021-2022 – Angela Dubay, President

- Continue newsletter, LinkedIn and website; add other media streams
- Facilitate meetings for Region 8, state and local committee chairs
- Invite Steven Tremblay, Emerging Leaders Chair for greater Pennsylvania AHU to meet our committee and advise on how to create and develop the Emerging Leaders Program
- Lay the groundwork of engaging regional business and industry leaders as resources for program
- Plan for in-person 2022 State Symposium, WAHU Medicare Summit.
- Maximize membership participation in Day on the Hill, Capital Conference and National Convention.
- Support Triple Crown achievement for President, President Elect, Treasurer, Legislative Chair, Membership Chair, Retention Chair and Professional Development Chair

# 2022-2023 – Casey Meehan, President

- Continue newsletter, LinkedIn, website and other media streams
- Create in-person annual or bi-annual 360° Round Table Leadership event for Region 8, state and local committee chairs
  - Location to be 'equally inconvenient' for all
- Move forward with identifying and qualifying participants and mentors for Emerging Leader Program
- Plan for in-person 2023 State Symposium, WAHU Medicare Summit, Other CE/ value delivery opportunities
- Maximize membership participation in Day on the Hill, Capital Conference and National Convention
- Support Triple Crown achievement for President, President Elect, Treasurer, Legislative Chair, Membership Chair, Retention Chair and Professional Development Chair

# SMART GOALS FOR OUR COMMITTEE CHAIRS



# AWARDS CHAR PARKER



## Goals:

- Drive to Landmark / Blue Ribbon Certification for WAHU
- All local Chapters Certified

## Details:

- Present NAHU Leadership Resources at July 2021 Board Meeting
- Present NAHU Education Foundation at August 2021 Board Meeting
- By September 1, meet virtually with Local Chapter Awards Chairs
  - Provide checklist of minimum needed items for certification
  - Provide guidance to local chairs on how to collect information and submit
- Round with President in January 2022 to determine any missing elements for April awards submission
- By March 2022, present NAHU website at a WAHU Board meeting

# COMMUNICATION

**M. PIERCE/J. FERNANDEZ**  
**CASEY MEEHAN**  
**MARY PIERCE**  
**GARY FRANKE**

**MONTHLY NEWSLETTER**  
**WEBSITE**  
**LINKEDIN, MAILCHIMP**  
**MEDIA**

## Goals:

- Demonstrate WAHUs value to membership and Industry by providing timely and useful communication

## Details:

- Monthly Newsletter:
  - Published on website on the 1st of the month, starting July 1<sup>st</sup>
  - Membership to be notified via MailChimp
- By August 1<sup>st</sup> , update website with new Board, NAHU podcast link and NAHU Education Foundation link
- By August 1<sup>st</sup>, send out Press Release of new Board and Awards
- Utilize LinkedIn by state and local board members
  - Post newsletters, NAHU updates, local chapter news, photos of events, etc.



# FOLLOW OUR WAHU LINKEDIN JUST CLICK BELOW



**Washington Association of Health Underwriters**  
Insurance · Seattle, Washington · 15 followers

WAHU delivers education, public policy information and policy recommendations to our members.

[Visit website](#)

✓ Following

AI & 1 other connection work here  
[See all 6 employees on LinkedIn](#)

## Goals:

- Communicate value and need for PACs

## Details:

- By September 1, meet virtually with Local Chapter PAC Chairs. Provide training on PAC participation reports, best practices and ideas to communicate value.
- Enforce expectation that all Board Officers contribute to both HUPAC and WAHU PAC.
- Develop HUPAC Fundraising Event ideas for December 2021
- Secure new WAHU PAC Chair for 2022 by February 2022



## Goals:

- Provide updates, blasts and newsletter on legislative news

## Details:

- Every month provide legislative updates for newsletter
  - Amplify Operation Shouts
  - Leverage Operation Shout for state issues
- Required participation on monthly Region 8 legislative call
- By September 1, meet virtually with local chapter legislative chairs
  - Provide best practices and ideas to communicate value to members
- Encourage membership participation in Day on the Hill, Capitol Conference and National Convention
- Develop Legislative Committee and secure new State Leg Chair for 2022 by February 2022

**KEITH WALLACE**  
**AMANDA RILEY**

**RECRUITMENT**  
**RETENTION**



## Goals:

- “Dream” of 400 members by June 2021
  - Focus on adding more partners to the table: TPAs, EAPs, etc.
  - Create Emerging Leaders Program sub-committee

## Details:

- Develop Chapter-specific membership goals and strategies
- By September 1, meet virtually with local chapter membership chairs
  - Provide training on NAHU membership reports, best practices and ideas to achieve membership goals; “Just Ask One”, One-day Blitz, new agent outreach
- Provide monthly new member information and ‘membership moment’ for newsletter
- Work with Professional Development Chair to create Emerging Leaders Committee by June 2021

## LISA THOMAS



### Goals:

- Explore avenues and resources for Virtual CE
- Explore NAHU for non-CE, income generating Webinars
- Create Emerging Leaders Program sub-committee

### Details:

- Investigate possible virtual classroom options for CE and Non-CE events
- By September 1, meet virtually with local chapter Professional Development chairs
  - Share knowledge and resources to support local CE/event efforts
- By February 2022 provide LPRT / REBC and other NAHU resources to membership through newsletter
- Participate on Symposium Committee for March 2022
- Work with Membership Chair to create Emerging Leaders Committee by June 2021

# INTER- CHAPTER

MARY PIERCE

JULIE SHEPARD-HALL

KEITH WALLACE

LACI MOYER

HARILYN DUMANCAS

WAHU

EWAHU

SAHU

SSAHU

TCAHU



## Goals:

- Develop partnership/relationship between State and Local Boards
- Mary to visit Local Boards, visits to be shared with membership

## Details:

- EWAHU *August 19th, 2020*
- SAHU *September - TBD*
- SSAHU *October 8th, 2020*
- TCAHU *November 10th, 2020*

\*Visits will be written about in Newsletter\*

# INTER- CHAPTER CONT...



## Goals:

- Emphasize Local Chapter President's roles and responsibilities as an important part of the WAHU Board.

## Details:

- Presidents are voting members of the WAHU Board, and therefore are very important in enacting Board business
- Presidents are required to attend monthly WAHU Board meetings, and if they cannot, they must appoint a substitute to attend and give their Chapter update
- Provide Chapter roster to WAHU President for Inter-Chapter coordination by August 1st

# 2021-2022 EVENT DATES



**Day on the Hill**

*January 19<sup>th</sup>, 2022*

**Capitol Conference**

*February*

**WAHU Symposium**

*March*

**National Convention**

*June*

# COMMITMENT = EXCELLENCE

Each Officer and Chair will be provided a Job Description and a Commitment Form  
Please review and then sign both documents to Accept

## NAHU Leader Commitment Form



I, \_\_\_\_\_ agree to perform the responsibilities and duties required of my position on WAHU Board for the year 2020-2021. I have been provided a job description and understand what the expectations of my position are. I will participate in all meetings and teleconferences as scheduled for my committee to the best of my ability.

I know that the success of my committee will impact all members of NAHU. I will seek to promote the best interests of our membership.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Position



**Thank you  
Mary  
Pierce!**

You took on the role of President with little preparation or resources, but jumped in with both feet.

Thank you so much for taking us on and keeping us moving forward!