

Ohio Association of Health Underwriters

Report Accelerated Planning Retreat

October 9-10, 2003

Background

The Ohio Association of Health Underwriters (OAHU) has a strong desire to continue to increase the effectiveness of the entire organization. The leadership of OAHU has a need to grow the organization and to prepare for, and anticipate the future needs of members and the health care industry in general. To that end a strategic planning session was conducted utilizing Accelerated Planning® techniques, with the full participation of OAHU's leadership. The Accelerated Planning techniques allow creative thinking (brainstorming) to take place, followed by the application of critical thinking techniques to reach consensus on final plans and actions.

The Purpose of the Retreat

To set a clear direction for OAHU
To plan for future success
To have decision-makers "on the same page"
To begin a multi-step process of growth and improvement

The Planning Process

Step #1 – Accelerated Planning Guidelines were reviewed
Step #2 – The Purpose of OAHU was reviewed and confirmed
Step #3 – The strengths/weaknesses/opportunities/threat were developed
Step #4 – The Vision of the future OAHU was identified
Step #5 – Key strategic questions were articulated
Step #6 – Strategies for Success were developed
Step # 7 – An initial action plan was written

These steps are reported below, beginning with Step #2.

The Purpose of OAHU

Several questions were offered to identify the key elements of the organization's purpose. The questions were: OAHU's core values and key beliefs? The "business" we are really in? We exist to...?

OAHU Core Values, Key Beliefs

We desire to help other Networking We value consumers We value our membership We believe market delivery works best	OAHU takes a leadership role The Free Market System Education re: issues We are a voice
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We Exist to...

To provide health insurance and reduce costs To serve consumers and members	To earn revenue To sell health insurance
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The "Business" We are Really in...

Developing and maintaining relationships Ethical business Increasing industry morale Educating re: free market system Insuring people Protecting interests of members	Serving consumers Moving people and recruiting Providing financial security Educating legislators Benefiting our members
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Key Elements of the OAHU Purpose

- **Promoting professionalism**
- **Providing legislative input**
- **Serving member's needs**
 - **Educating members**
- **Assuring the free delivery of health care**

These elements were found to be in congruence with the Mission of OAHU

"OAHU will support its local associations in promoting free-market delivery of health care and the value of the professional agent."

Environmental Scan of Strengths/Weaknesses/Opportunities/Threats

Strengths of OAHU

Legislative impact
Leadership skills
CCI Worker's Comp.
Leadership networking skills
Developing professional skills

Continuing education
Networking
Talent of members
National affiliation
Strong Executive Director

Weaknesses of OAHU

Retention of members
Carrier support
Industry consolidation
Lack newer/less experienced members
Lack deep financial resources

Volunteer-based organization
Some differing agendas
Some apathy
Volatility of industry

Opportunities Facing OAHU

Create more public awareness
Legislative inroads
Networking with other associations
Increased membership
Provide direction to industry

Long-term care sales
Health care "crisis"
Professional relationships
Ongoing need for education
Impact political leaders

Threats Facing OAHU

Growing competition
Governmental health care initiatives
Uninsurable uninsured people
Aging membership
Health care premium cost increases
Mandates

Membership attrition
Loss of members
Member apathy
Industry consolidation
Lower commissions
Potential poor PR

The Future Vision of OAHU

To identify the future vision of the organization, the group was asked to consider what their aspiration are for OAHU; and what the organization should look like in approximately five years. In general term, the responses were:

Strong	Leaders in the industry
Financially strong	Much bigger, more effective
The foundation for the future	More recognized
Seen as the industry experts	Prestigious for members
Resourceful	Well-known and respected

Measure of Future Success

1. Significantly increased membership numbers
Perhaps as much as 5000 members in five years
90% retention rate
2. Much larger influence
OAHU PAC target - \$100k
3. Increased name recognition/Increased public and industry awareness
Become "THE Preferred Authority"
4. Expanded membership
Attract "newer" members
Attract members with interests in health care like business leaders
5. Stronger bond between members/Increased organizational effectiveness
More interaction between locals
Increased communication and technical capabilities

Key Strategic Questions

To achieve the future vision, there are several questions that must be identified and answered. The answers will be the strategies the organization will implement.

Question #1 – How do we grow membership to the desired level?

Question #2 – How do we continue to grow the leaders necessary to achieve our future success?

Question #3 – How do we increase public awareness and become “THE Preferred Authority”?

Question #4 – How do we become more influential and raise necessary PAC funds?

Question #5 – How do we increase organizational effectiveness including increased member interaction and involvement and to best utilize the volunteer time of members.

OAHU Strategies for Success

2004 and Beyond

These strategies are the direction and agreed upon areas of emphasis for continuing the success of OAHU.

Strategy A. Growing membership significantly.

A key to increased success of the organization is becoming attractive to a wider variety of members and growing the financial strength of OAHU. To accomplish this several tactics will be pursued. The tactics include marketing to affiliated industries, soliciting business leaders (non-members) for membership, considering the use of retired industry professional as recruiters, and increasing the emphasis and resources necessary to achieve dramatic membership growth. To increase member retention special efforts will be given to making new members feel involved and offering methods to achieve rapid integration to the organization.

Strategy B. Continuing to grow leaders

To achieve the desired long-term results requires on-going effective leadership. The office of President will take a more active role in identifying and grooming co-chairs as a means of increasing continuity within OAHU. An appropriate program of mentoring will be developed and monitored for effective implementation as a means of developing leaders, and also as a means of increasing member involvement. Continuing education efforts will offer some increased focus on leadership development including books, handouts and other media.

Strategy C. Increasing public awareness and becoming “THE Preferred Authority”

The strategy to increase awareness will continue to utilize the professional marketing and communications efforts of Clary Communications. The effort includes the development of issue/cause-based communications, assistance with effective PR, and direction of volunteer efforts. Additionally, locals will be offered assistance in conducting appropriate actions within their regions.

Strategy D. Increasing Influence and raising PAC Funding

OAHU believes the best way to increase influence is to increase PAC funding. The strategy to achieve the \$100,000 goal is more than just the annual PAC fund Drive. It consists of targeting every member on 10 x 12 contributions, targeting “high rollers” and encouraging contribution by effectively recognizing contributors.

Strategy E. Increasing member involvement, increasing interaction among members, increasing the bond between members and optimizing members volunteer time

To achieve these goals, OAHU will place increased emphasis on utilizing the existing structure to communicate via the President and committee chairs regarding member involvement, participation and interaction. The local Presidents and State Committee Chairs are responsible for initiating communications. Various tools will be considered to assist in achieving the goals, and may include operations manuals with clearly defined expectations, State “Welcome” packets, and utilizing technology to best advantage.

OAHU Action Plan #1

<u>Strategy/Task</u>	<u>Who</u>	<u>When</u>
<u>Strategy A. Grow Membership Significantly</u>		
Agree to clear direction statewide re: growth plan	State Membership Committee (Jessica/Randy)	Report 11/03
<u>Strategy B. Growing Leaders</u>		
Presidential Emphasis, Co-chair mentoring	State President & Chairs or designee	On-going agenda topic, interim report March '04
<u>Strategy C. Creating Awareness</u>		
ID local PR rep	State Pres. & Executive Director	Jan. '04
Continue working with Clary Comm.	" "	On-going
<u>Strategy D. PAC Funding</u>		
Target "High Rollers"	PAC Comm.	February '04
<u>Strategy D. Organizational/Member Effectiveness</u>		
Regular Board agenda item	Pres. Elect. & Executive Director	Board Meeting

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 Facilitator: P. Clifford
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Appendix "A"

Brainstormed Listing of Potential Strategies and Tactics

Strategy A – How to Grow Membership

Use recruiters	Market to like industry
New member orientations/activations	Develop member pride
Identify and sell our value	Sponsor a 10k race
Develop company support	Teach
Have fun social interaction	Mail meeting info nonmembers
More \$ in membership development	Promote events to nonmembers
Advertise	Show value
Have contests	Great [programs and speakers
Free C.E. on what OAHU does	Recruit other associations
Let our clients know	Get people involved
Outreach	Offer several member levels
Celebrity spokesperson	

Strategy B – Develop Leaders

Media, books, videos	Get new members involved
Communicate leader accomplishments	Targeted member recruiting
Continue education	I.D. and groom co-chairs
Develop mentoring program/process	

Strategy C – Increasing Awareness, Become THE Authority

Know local reporters	Consumer is our "cause"
Uninsurability is a cause	Develop "symbols"
Push it down to locals	Get clients involved
Maintain Clary relationship	Rally Towels

Strategy D. – Influence and PAC \$\$

Continuous solicitations	Target PAC givers
Look to corporate	Target specific membership
Target high rollers	All on 10x12 contributions
Recognize contributors	

Strategy E – Increasing Effectiveness/ Members time, etc.

Have state "Welcome Packets"	Small group meetings
DWYSYWD	State chairs responsible
Presidents are means of communication	Operations manuals
Clearly set expectations	

