

Strategic Plan Review

January 20, 2011

Columbus, Ohio

Steve Brubaker began the review of our strategic plan. The next full review will be in 2013.

In 2008 OAHU didn't realize what was in store for us. Virginia Safford from NAHU helped with the original strategic plan and we hold a review annually. Today we will review the goals and the discussions from a year ago.

As a state board we had 4 major roles.

Goal number 1:

Develop Additional Communication with our members and the public to educate them as to what OAHU is.

OAHU has worked on this in the following ways:

- Role of the Agent Brochure
- CE's
- Improved OAHU website
- Legislative review email sent out to members each week

OAHU would like to really focus on goal 1 in the coming year to have OAHU name recognition. Randy Klein has been put in charge of putting a task force together to look into possibly hiring a PR firm and will report on this after the committee meet.

Goal number 2:

Continue to be recognized in the legislative, regulative and public sectors as the authority on matters of health insurance. OAHU is called upon often and looked at as a group of individuals know healthcare. Most government workers haven't had an agent and do not realize the importance of having an agent.

OAHU has worked on this in the following ways:

- Day at the Statehouse
- ODI involvement
- Members contacting local legislators
- Special July DC fly in

Goal number 3:

Membership

The economy was still good in 2008 when OAHU chose the goal of reaching 950 members. That goal is not realistic right now. OAHU is back to 706 members after losses two years in a row. Those in attendance made a new goal of reaching 789 members by 2013.

OAHU has worked on this in the following ways:

- Drip campaign which was marginally successful
- OAHU pays the early bird registration fee for members

Retention:

- OAHU is working on big agencies and trying to encourage them to become members
- OAHU has an 82% retention rate and are ninth in the country for retention

Goal 4:

OAHUPAC reached the mid \$40,000 for 2010 as this was a big election year. We would like to see 100% board participation in our OAHUPAC to help fight the good fight for legislation.

John McGough, Keith Shoemaker, Bob Lackey, Steve Brubaker, Lee Nathans, Tim Barhorst and John Dodd had lunch today to discuss the PR firm that CAHU is thinking of hiring. CAHU's board received information on a PR firm to find out how to brand the association. Randy will put together a task force committee to look into the suggested PR firm. This committee will contain a cross section of the state and will bring their recommendation back to the board. Lee Nathans and John Dodd will develop criteria as to which PR firm has the best plan to help OAHU with name recognition.

OAHU is being recognized in the legislative area, but in public area we are still not recognized not even by our clients.

Chris Heiberger mentioned that CAHU is prepared to hire the PR firm on their own. Chris said that if the state decides to hire the PR firm CAHU is prepared to contribute \$10,000 to the expense. Chris advised those in attendance that this is not just a PR firm, they also have experience in providing mission statement and help in the non- profit and healthcare arenas.

Meeting adjourned at 3:00 PM

Next Review of plan
January 2012