



CAHU 2021-2022 Strategic Planning

July 14, 2021

CAHU Strategic Planning - July 14, 2021
Location: The Word & Brown General Agency
721 S. Parker St, Building C
Orange, CA 92868
Time: 10:00 am – 3:00 pm

Present

President, Brad Davis
President Elect, Sue Wakamoto-Lee
Immediate Past President, Maggie Stedt
VP Membership, Barbara Ciudad
VP Communications, Dorothy Cociu
VP Public Affairs, Bruce Benton
VP Legislation, Dawn McFarland
VP Finance, Cathy Little
VP Corporate Affairs, Meg McComb
VP PAC, Craig Gussin
Chair Awards, Patricia Stiffler
Co-Chair Medicare (Southern CA), David Garcia
Chair Vanguard, Heather Siems
Chair Diversity, Mariette Lasley
CAHU ED Director, Nathan Carlson
Legislation/Lobbyist, Faith Borges
CAHU Member, Vanessa Ignacio

Not Present

VP Community Outreach, Tim Kanter
VP Professional Development, Jack Holder
Medicare Co-Chair (Northern CA) Rosamaria Marrujo

Strategic Planning

Brad Davis review the CAHU mission and vision statement. The planning group made updates to the CAHU vision statement. The group did not make changes to the CAHU mission statement. The new CAHU vision statement is listed below.

New Vision Statement

Every Californian has access to solutions for health, financial and retirement needs, through services provided by insurance professionals.

Governance

- RFP for ED/CAMS – Brad Davis, Maggie Stedt, Sue Wakamoto-Lee, Cathy Little (Q1)
 - Write RFP
 - Analyze Financially
 - Present and Vote
- Fill two spots on the Finance Committee – Cathy Little (Q3)
 - Draft Summary of CAHU finances
- Reorganize CAHU accounts to maximize non-profit value – Cathy Little (Q4)
- Review P&P's for updates and modernization – Maggie Stedt, Sue Wakamoto-Lee (Q1)
 - Prepare Bylaws for attorney review
- Explore and form a virtual chapter – Sue Wakamoto-Lee (Q1)
- CAHU rename and rebrand, website and DBA Adhoc Committee – Brad Davis (Q4)
- Support and develop local chapter leadership through CLD Committee and leadership summit – Maggie Stedt, Sue Wakamoto-Lee (Q1)
- Presidential focus group (ASAP)
- Increase executive social media presence: videos, podcasts, president's message – Brad Davis (ASAP)

President - Brad Davis

- Further investigate name change/branding
- Increase social media presence, videos, podcasts, president's message
- Better communication and support for local chapters, monthly call

President Elect - Sue Wakamoto-Lee

- Updates to bylaws and P&P
 - Virtual chapter committee
- Plan leadership retreat July 2022
- Identify full board for 2022-2023

Immediate Past President - Maggie Stedt

- Oversee Governance Committee
- Work with membership
 - Mentor
 - Work with chapters
- Nominations and elections

VP of Finance - Cathy Little

- Manage Finance Committee, fill vacant seats
- Open new accounts to maximize funds
- Create monthly financial summary

VP Communications – Dorothy Cociu

- Creation of the CAHU STATEment every two months
- Podcasts at least every two months
- Improve social media presence
- Work with public affairs to increase awareness of health insurance awareness

VP of Membership - Barbara Ciudad

- 10 percent net increase in membership
- 20 percent new members
- Exploring purchasing a new DOI list
- Increase media for membership

VP of Public Affairs - Bruce Benton

- Will be working with consumer and media relations, and providing educational materials for consumers and legislators, town hall meetings, or consumer-based educational meetings
- Establish a formal CAHU Statewide Media Relations Committee
- Meetings to be conducted bi-monthly unless in crisis mode
- Agenda will consist of state and national legislative priority updates and to develop communications strategies to inform the media and CAHU membership through print and online media including social media
- Distribute press releases, letters-to-the-editor and Op-Ed
- Direct media interviews to CAHU president or locally if advantageous
- Collaborate with CAHU's vice president communications to deliver podcasts and communications on relevant industry topics to both members and the public
- Public affairs independent contractor – strategic plan and budget recommendations
- Participate and integration with CAHU Legislative Council and Teleconferences
- Participate on NAHU media relations teleconferences
- Stay current on NAHU federal priorities including podcasts
- Stay current of CAHU education foundation activities for area of integration

VP Legislation - Dawn McFarland

- Defeat single payer legislation
- Have an impact on the Health CA for All Commission report (will impact the future of health care legislation)
- Build relationships with policy makers and industry leaders
- Change the CAHU name

VP Corporate Affairs - Meg McComb

- Develop engaging relationships with sponsor partners - ongoing
- Quarterly communications with existing partners
- Double the corporate sponsorship in 2022

VP PAC - Craig Gussin

- Increase PAC contest – August 1st
- Increase PAC contributors
- PAC event at the Capitol Summit
- Increase help for PAC Chairs
- Update the PAC website

VP of Community Outreach – Tim Kanter

Tim Kanter could not attend - Vanessa Ignacio filled in position

- Recruit mentors and mentees
- Connect with all chapters to increase awareness of non-profit for contribution purposes
- Foundation board stability and continuity

VP of Professional Development – Jack Holder

Jack Holder could not attend – The planning group provided the goals

- Professional CE day event
- Host NAHU certification program
- Explore professional certification program – CAHU Academy
- Promote Health Insurance Awareness Week
- Add new CE courses and clean up old courses
- Create a speakers bureau on the website
- Promote LPRT

Chair Awards - Patricia Stiffler

- Apply for landmark, website, media, president citation plus any additional awards
- Get all chapters certified – qualifications for blue ribbon award
- Encourage/facilitate at least six local chapters to apply for NAHU awards and at least one State award.

Co-Chair Medicare (Southern CA) – David Garcia

- Increase website presence and traffic sponsorship with banner ads
- Increase Medicare agent memberships through articles in the STATEment and podcasts

Chair Vanguard - Heather Siems

- Brand and promote vanguard event
- Create one stand-alone vanguard event
- Appoint and develop vanguard chairs in local chapters
- Explore apprenticeship program

Chair Diversity - Mariette Lasley

- To inform, educate, and build awareness of what diversity & inclusion means, and what it looks like within our industry association.
- To establish a committee consisting of myself, a vice-chair, and local chapter leadership in the same role, or having a passion of contributing to the D&I efforts
- Collaborate with the VP of communication to publish articles to communicate throughout CAHU membership, sponsors and affiliates
- To work with the VP of professional development to include a segment in all CAHU Events/Panel for live and informative communication.
- Participate in NAHU D&I Task Force meetings to acquire and pass on communications to the state and local membership.

Executive Director – Nathan Carlson

- Support board and committee members to attain their strategic goals
- Increase membership by 10 percent
- Continue to create value for members with high quality events

MISSION: CAHU will improve its members ability to meet the health, financial, and retirement security needs of all Californians through education, advocacy, legislation, and professional development.

VISION: Every Californian has access to solutions for health, financial, and retirement needs through services provided by insurance professionals

STRENGTHS		WEAKNESSES	
Brand / Re-Brand	Member base	Volunteer Board	Averse to Change
Westbound - Professional PR Firm	Opportunity for Growth: Personal & Bu	Time Limitations	Inertia
Diversity: Culture, Experience, Function	Legislative Information & Advocacy	Lack of Succession Planning	Outreach
History - 90+ years	Nationwide leader & recognition	Perceived as Self-Serving	Aversion to Outside Groups
Connections - Executive, Coalition, Indu	Trendsetter	Limited Financial Resources	Aversion to being first
Savvy--Political, Business, Concepts, Inc	Rich Culture of Professionalism	Member Retention	Aversion to Risk Taking
Inclusive	Depth of Knowledge	Committee Structure	Early Adopter - Lack of
Website - Resources	Access to Knowledge and Solutions	Bandwidth	Fear of being first
Accessible - to leadership	Gold Standard for Industry	Competing events	Not Using our Grassroots - Ground For
Amicable - Honest - Transparent	Simplify Complex Issues	Negative perception of California (natio	Unclear on "One Voice"
Networking - Comaraderie	Education - Continuing Education	Inability to attract Young Professionals	Empowering "Troops"
Flexible, Adaptable	Professional Standards - Ethics	Communication - not enough self-prom	Not Leveraging our influence (grasstop
Welcoming	Innovative - Progressive Thinking	Heavy Reliance on Carriers & Non-agen	Need more "outside the box"
Sense of Belonging	Unbiased - Apolitical - Non-partisan	Recruitment - too timid	Not perceived as invaluable (must have
Family - Mentorship	Creative Thinking	Accountability	Specialized Board Position training
Selfless - Good for industry is good for t	Collaborative	No Empowerment of Members	Loss of historical knowledge
Consumer-focused	Communication - Statement - Social M	Training at the local level	Disaster Planning - Natural & Financial
Positive Reputation	Toolkits - infographics	Roadmaps	Cultural Outreach
OPPORTUNITIES		THREATS	
Membership Growth thru uniting again	Foundation Expansion - Awareness & P	Aging	Limited ability for in-person events
Single Payer	Agent Licensing - CE	Shrinking Workforce - consolidation	Emergency Regulations
untapped young professional mkt	CAHU Academy	Shrinking Disposable Income - Fundrais	Entitlement Expansion (contracts insur
Unite Local Chapters	Leadership Academies (Women, Chapt	Single Payor	Natural Disaster
Professional & Industry training of big l	DOI Database - Mailing List - Outbound	Mergers & Acquisitions - consolidation	Hospitals/Providers competing with Ag
Differentiating Agents from the herd	Untapped Cultural Mkt	Annihilation of industry	Encroachment of other Industries
Everything is Digital (Meta)	Affinity Programs	CAHCP.org - Imposter Associations	Insuretech
Large Agencies	Collaborate with Big Picture GA's etc..	Legislation	International Competition - Insuretech
Untapped Medicare agent mkt	Collaborate with Aggregators	Legislative Environment	Cyber Security
P&C, Life, Phys Grp - Sister industries	Collaborate with Industry Consultant G	Direct to consumer	SaaS Agents
Education	Corporate Affairs Expansion	Cancelling of Agent Contracts	VC/Tech Money & Disruption
Certificate/Designation specific to CA		Inflation	Client Retention
Cultivate Young/Emerging Leaders		Locked Up Workforce	
New Brand		Cal-Exit	
PR Company Utilization		California not business-friendly	
Virtual Chapter		Polarization of Political Views	
Mentor Program		Covid / Pandemic	

*Perception is Reality