

2009 – 2011 Strategic Plan

Massachusetts Association of Health Underwriters, Inc.

- ❖ **Goal 1 The Board Treasurer, Finance Committee and Association Manager will develop financial guidelines for 2007-2008.**
 - Action 1 – request that Patty Loonie participate in the budget plan with Paul Pietro and KCB
 - Action 2 – Development of a two year timeline/matrix to include short and long term goals for:
 - Revenue Growth
 - Revenue Sustainability

- ❖ **Goal 2 Provide Massachusetts perspective regarding the Massachusetts Health Care Reform.**
 - Action 1 - Increase local and statewide contacts and public relations through the Carrier Advisory Council contacts
 - Action 2 - Increase contact with state and federal legislators on health care reform and the relationships of the cost versus affordability issues
 - Action 3 - Contact the National Association of Health Underwriters (NAHU) about participation in National Legislative Conference
 - Action 4 - Develop MassAHU position paper on Massachusetts Health Care Reform, with a focus on the role of the broker and the Connector in the program

- Goal 3 Increase MassAHU's visibility among Legislators, Regulators, Insurers, Members and Clients**
 - Action 1 - MassAHU will increase broker awareness and visibility through a successful relationship with the newly established Carrier Advisory Council
 - Action 2 - Articulate the value of the Council's relationship to MassAHU
 - Action 3 - Publish MassAHU newsletter on a more frequent schedule
 - Action 4 - Develop newsletter items members can provide to clients
 - Action 5 - Develop programs members can present to clients
 - Action 6 - Develop a MassAHU Speakers Bureau

- ❖ **Goal 4 Develop a comprehensive plan for education**
 - Action 1 – Seek suggestions for educational programs from members
 - Coordinate with others within the industry on education programs
 - Coordinate with NAHU on education programs

- Seek insurer sponsorship for education programs
- Develop a member educational survey with incentives to complete and to provide feedback

❖ **Goal 5 Develop and implement a membership campaign**

- Action 1 - Acquire list of licensed health underwriters
- Action 2 - Contact top brokers through personal contact
- Action 3 - Explore Corporate (Agency) memberships
- Action 4 - Develop incentives for memberships
- Action 5 - Create a “members only” log-in for MassAHU website
- Action 6 - Create “fear” in potential members (e.g. a “*Did You Know*” bulletin bi-weekly)
- Action 7 - Offer membership to non-members when attending MassAHU events
- Develop a member value (?) survey with incentives to complete and to provide feedback

❖ **Goal 6 – Internal Structure**

- Full board participation on Membership committee
- Develop a board assessment for directors