



## Strategic Planning Sessions

**Strategic Planning Session 1.  
June 25, 2005**

**Strategic Planning Session 2.  
January 19, 2007**

**Strategic Planning Session – Mid Year Review Session 3.  
January 9, 2008**

**Strategic Planning Session 4.  
January 9, 2009**

**Strategic Planning Session – Mid Year Review Session 5.  
January 22, 2010**

**Strategic Planning Session – Year in Review & Planning for  
2011 Session 6.  
January 19, 2011**

**Strategic Planning Session – Year in Review & Future Goals for  
2012 Session 7.  
March 14, 2012**

**2014 – 2016 Strategic Planning Session 8.  
January 15, 2014**

**Strategic Plan Review 9.  
January 15, 2015**

**2016 – 2018 Strategic Planning Session 10.  
January 13, 2016**

**2017 Review of 2016-2018 Strategic Plan  
January 11, 2017**



**Vision Statement:** The Massachusetts Association of Health Underwriters is a leading organization for health insurance and employee benefit professionals in Massachusetts who are committed to provide access to private sector solutions for health insurance professionals.

**Mission Statement:** The Massachusetts Association of Health Underwriters is dedicated and committed **to providing professional development that the National Association of Health Underwriters offers and advocacy for our members and to promote professional excellence** in the application of all health insurance and related products and services in Massachusetts.

**Code of Ethics:**

- To hold the selling, service and administration of health insurance and related products and services as a professional and public trust and do all in my power to maintain its prestige.
- To keep paramount the needs of those whom I serve.
- To respect my clients' trust in me, and to never do anything which would betray their trust or confidence.
- To give all service possible when service is needed.
- To present policies factually and accurately, providing all information necessary for the issuance of sound insurance coverage to the public I serve.
- To use no advertising which I know may be false or misleading.
- To consider the sale, service and administration of health insurance and related products and services as a career, to know and abide by the laws of any jurisdiction Federal and State in which I practice and seek constantly to increase my knowledge and improve my ability to meet the needs of my clients.
- To be fair and just to my competitors, and to engage in no practices which may reflect unfavorably on myself or my industry.
- To treat prospects, clients and companies fairly by submitting applications which reveal all available information pertinent to underwriting a policy.
- To extend honest and professional conduct to my clients, associates, fellow agents and brokers, and the company or companies whose products I represent.



**MassAHU taking the lead in Legislation  
and Advocacy based on the guiding  
principles of Advocacy and Professional  
Excellence**



# Principal 1

- Broker driving the bus on Education and Literacy. Providing tools to support broker education and professionalism to do so.
- Taking the lead in Legislation and Advocacy
- Regulatory “watch dog”

# Principal 2

- Empower members to increase client literacy, education, understanding and how to make informed health care choices
- Live Web Series options
- Increase social media options to convey MassAHU’s vision and commitment



**Strategic Key Goal 1:** The Board Treasurer/Finance Committee and Executive Director will continue development of two year timelines within a fluctuating revenue model.

The following Action Guidelines will be implemented for successful completion of Key Goal 1

Ongoing: development of a two year timeline to include short and long term goals for revenue growth and revenue sustainability.

Ongoing: the MAIA VP of Finances continues to provide oversight and guidance during the budgetary process. Treasurer relies on this input before final annual review. Best Practices protocol is utilized.

Ongoing: regarding long term viability based on membership income alone is tentative and of concern. Income that is event driven is the basis for MassAHU's viability at this time.

New (2017): Develop of a Succession Plan and Strategic Revenue Model.

**Strategic Key Goal 2:** Communicate effectively the Broker perspective in Massachusetts

The following Action Guidelines will be implemented for successful completion of Key Goal 2.

Ongoing: : Continue to engage local and statewide non-governmental contacts, state wide officials, state and federal legislators regarding health care reform issues.

Ongoing: Communicate MassAHU 's perspective through various media and meeting venues helping to make the public aware of the value of the employee benefits broker professional and the MassAHU brand.

Ongoing: networking and partnering with Carrier Advisory Council and Ancillary advisory council members exploring ways to increase visibility and the MassAHU voice. Meetings occur on a quarterly basis.

Ongoing: MassAHU board members and membership continue to reach out in their established working relationships and coalitions with Health Care related organizations such as the Health Care Policy, Commission , the Center for Health Information & Analysis , the Health Connector, the Attorney General's Office, the Office of Consumer Affairs and the Pioneer Institute.

Ongoing: MassAHU will continue its strong working relationships with the Commonwealth's state exchange, the Health Connector

Ongoing: The continued Communication and outreach with legislators on the state and federal level continues by way of involvement of legislative counsel and legislative committee as a resource to help policy makers in their public decision making.

Ongoing: MassAHU continues to support the independent, small business community through outreach and partnerships with fellow associations and organization and other business groups to help the public know and understand the value and role of the professional employee benefits and consultant specialists.



### **Strategic Goal 3:** Develop a comprehensive plan for professional development

The following Action Guidelines will be implemented for successful completion of Key Goal 3.

Ongoing: MassAHU to continue to build member value opportunities and incentives with outside venues for Continuing education and professional development

Ongoing: MassAHU to promote NAHU specific programs and other industry valued opportunities and incentives for members' professional development

Ongoing: MassAHU will continue to provide members exposure to the latest and most innovative tools and services in the industry increasing conductivity.

Ongoing: the MassAHU state chapter, and that of national, will continue to provide resources and other events toward members' professional endeavors and growth.

Ongoing: MassAHU will continue to promote the highest ethical business standards on behalf of our members and that of the publics.

### **Strategic Key Goal 4:** Promote the value of membership in MassAHU, the professional trade association for employee benefit agents, brokers and consultants

The following Action Guidelines will be implemented for successful completion of Key Goal 4.

Ongoing: Promote MassAHU as a resource to increase the members' professional knowledge and networking opportunities - opportunities that non members do not have to current and prospective members effectively

Ongoing: Promote how affiliation with MassAHU increases your professional edge and expertise

Ongoing: promote that MassAHU membership translates into a positive and impactful understanding with the public and policy makers on the important role that employee benefit professionals play.

Ongoing: Transition the traditional membership perception into a new model - a model that helps to change the focus of and the MassAHU brand. That the value membership can increase the member's professional image and market impact.