

## **CAHU President's Message - Margaret "Maggie" Stedt, C.S.A. LPRT**

**August/September 2020**

### **CAHU Strategic Planning and Goal Setting are In the Works!**

Once again, we are the beginning of a new CAHU year! Your new Board has been duly elected, sworn in and is working on completing the first pass at Strategic Planning! There is a promise of an exciting and challenging year. In the reality of the COVID 19 Pandemic it will be a year like no other as we seek grow in membership, continue our advocacy on behalf of our members, to provide up to date information on our industry and legislation and to support our thirteen local chapters!

Our State and local associations are working hard using virtual platforms to provide meetings with meaningful content and connection. We have a greater opportunity to participate in all of chapter's programs, build relationships and share ideas and concerns. Participation in the various CAHU committee monthly meetings for chapter leadership has never been more important! Our Sponsors' commitment and ongoing support continues to be much appreciated and vital to the success of our association!

CAHU recognizes that many of our members are struggling to maintain and grow their business under the reality of the Covid 19 Pandemic environment. Members all are on steep learning curves on the use of electronic enrollment and virtual meeting platforms. They are figuring out the best ways to connect with prospects and clients in all lines of business while conducting their businesses under regulatory compliance. And we miss meeting and gathering together at meetings and sharing meals!

I am really excited about the ideas, goals and commitment of your CAHU Board. I would like to share a quick overview of some of ideas and goals from our CAHU first of our strategic planning sessions. Note that we will be finalizing CAHU's goals and objectives at our August Board meeting and will disseminate them shortly thereafter.

VP Membership - Barbara Ciudad will be working with chapters to help with recruitment and retention. The Membership Goals for this year are to (1) educate and assist the local chapters in retaining current members. (2) To provide a Statewide campaign for membership that motivates and encourages retention and membership. And, (3) the production of short videos from local chapters promoting membership. Membership will also be conducting Membership Surveys through the year.

VP Profession Development - Mariette Lesley's key objectives are to Engage, Connect and Empower. Engage with local chapter leaders and program chairs, learned what their goals are and how CAHU can help. Starting monthly there will be PD call to work on action items and to provide accountability (2<sup>nd</sup> Fridays of the month at 10 am). Connect with state and national counterparts to develop vision and find useful tools, and have chapter leaders discuss what works for them. Empower members and each to create collaborative culture – have valuable speakers for CAHU Summit, collaborate with Kimi, CAHU's Director on CE course updates and to provide ten Medicare courses and to conduct member surveys to determine what members want from CAHU and NAHU in regards to Professional Development.

VP Communications – Dorothy Cociu's goals include:

- 1) To create and distribute an electronic version of The STATEment every other month for the board year (July-August, Sept-Oct, Nov-Dec, Jan-Feb, March-April, May-June) by the first of the month that is due (July-August by July 1, etc.)
- 2) Record, edit and post at least 6 CAHU informative podcasts, in opposite months of the STATEMENT release dates (August, October, December, February, April, June), and others upon request/need by the CAHU Board.
- 3) Create Hard Copy Capitol Edition around Elections and Day at the Capitol for the Legislative Team to distribute to members of the Assembly, State Senate, and all primary government offices, designed to educate the staff and legislators on important issues related to our industry.
- 4) Work with our Social Media Team and CAHU Executive Director to have a robust and informative Social Media presence and provide pertinent information to the executive director for the CAHU Website.

VP of Public Affairs - Paul Roberts' vision for role is for CAHU to be recognized as a source of expertise and advocacy in the health benefits industry among consumers, the American media, and benefits professionals – with a goal of expanding CAHU's visibility and mission, while also increasing membership. His goals include:

- 1) Establish true relationships with media- become contributing sources and create a wider reach among entire industry – Cal Broker, Benefits Pro, NAHU, SHRM, etc.
- 2) Improve and create public resources for consumers and to create a better dialogue to inform consumers including establishing a formal press release plan.
- 3) Improve CAHU website by updating with current information/press releases
  - o Create a press kit for CAHU on website - September 1, 2020
  - o Learn more about Chapter Press Hits, Newsroom improvements, Op-Ed pieces, better links for consumers

VP Finance – Cathy Little's goal to keep the association in a good fiscal position. CAHU's reduction in membership and revenue and the COVID pandemic have impacted our bottom line but we continue to remain in good standing and are maintaining the required reserves. She noted that the finance committee meets once a month.

VP Corporate Affairs - Yolanda Webb noted that everything is inter-related with Corporate Affairs. Her goals are to (1) Rebuild – thinking outside the box for events/sponsorships (2) Create greater value for our sponsors and (3) offer additional opportunities and include more sponsors from the insurance industry.

Women's Leadership Summit Update – Cerrina Jensen noted the event that was to be held in 2020 has been postponed to the Spring of 2021. Her committee is in the process of changing the venue in Las Vegas. She is especially pleased to report that many of sponsors of the event have continued to be committed to recheduled event!

VP Political Action – Sue Wakamoto Lee noted that as this year is a general election year support of PAC is more important than ever. PAC is working to promote donations and to increase local chapter board participation. They are working to update the both the PAC website and the PAC chapter presentation (PPT). PAC's goal is to raise \$200,000 by 06/30/2021!

VP Community Outreach - Dawn McFarland reported that The CAHU Foundation is working hard to (1) develop marketing and outreach (2) to develop and implement an internship program on a statewide basis. This also could include raising funds to cover new agent training and licensing. And, (3) To engage chapter public service and community outreach chairs around developing internship and raising funds

Chair of CAHU Awards – Pat Stiffler noted that the goals are for (1) Every chapter to achieve Silver Certification from NAHU, (2) Every chapter applies for CAHU awards and also for NAHU awards. And, (3) Have CAHU apply for as many awards as possible.

Chair of Vanguard - Heather Siems' overall goal is to make sure that programs are developed to engage members and to meet goals at NAHU and CAHU level. Vanguard is committed to moving the industry and chapters forward in an innovative way. Her specific goals for Vanguard are to:

- 1)Expand awareness and reach for Vanguard beyond planning parties
- 2)Develop programs within chapters who do not have a robust program
- 3) Promote interaction, collaboration and engagement within CAHU chapter community

Director of CAHU - Kimi Shigetani shared that she is committed to (1) Ensure that the CAHU events are successful and professionally executed (virtual and in person) and (2) To support board and chapters as a resource.

Please note in the next edition and through a separate release we will include the specific goals from our Medicare Committee under David Garcia, Brad Davis our Legislative VP and Faith Borges our Lobbyist, our Immediate Past President Bruce Benton, our local chapters and your President's along with the top goals and commitments for CAHU in this coming year!

We have a lot of work to do and are committed to moving our association forward! We are appreciative of the hard work and dedication of our prior CAHU Boards and local chapters' leadership and are looking forward to building on their great work and legacy.

As your new President I am looking forward to working with our each of chapters, members and representing you. I am truly blessed with such great and committed leadership at the State and local level! I can't wait to see what we can achieve together!

A handwritten signature in cursive script that reads "Maggie Stuart". The signature is written in dark ink on a light-colored background.