



Strategic Plan

June 14, 2017

Mission Statement

UAAHU will improve its members' ability to meet the health, financial, and retirement security needs of all Americans through education, advocacy and professional development.

Goals for July 2017 – June 2018

1. Create a balanced budget and at year end have a positive Profit & Loss statement
2. Develop leadership and increase broker involvement at the board level
3. Provide added value to our membership by following procedures within the NAHU awards programs with an expectation of earning the awards. Including:
 - a. Landmark
 - b. Chapter Seal Certification
 - c. Presidential Citation
 - d. Legislative Excellence
 - e. Media Relations
 - f. Website
 - g. Robert W. Ostler

Plan of Action

1. Craig Paulson, President, to prepare budget to be presented and approved by the executive board at the August 8, 2017 board meeting. Manage the financial affairs of the association within the guidelines of the budget.
2. Each general board member will contact at minimum two brokers and/or agencies and setup a meeting to discuss their interest in serving UAAHU. Service needs include assisting a committee, serving on future general boards or executive boards, or filling executive board Secretary position. A member of the executive board will accompany the general board member at the meeting with the agent/agency.
3. Offer grants to assist with costs associated with attending NAHU's Capitol Conference to three UAAHU broker-members that have never participated in the conference.
4. Landmark, Presidential Citation and Chapter Seal Certification assignments were given to each board member. The Awards Committee co-chairs will track progress of assignments at each board meeting. Each committee chair will work towards earning the award associated with his/her committee.