



## **Annual Report and Activities Summary**

**May 15 – 16, 2018 – UAHU Sales Congress** – Over 250 producers and carrier representatives attended. 4 hours of CE offered. Extraordinary carrier support with incredible speaker lineup. Speakers included: Mike Embry, NAHU President; Marcy Buckner, NAHU VP of Gov't Affairs; Representative Jim Dunnigan; Clint Cart, Account Executive TASC; Brian Pilling, PhD; Melissa Chang MD; Tanji Northrup & Jaakob Sundberg, Utah Department of Insurance. Board Members for next service year sworn in.

**May 24, 2018 – Star Wars Movie Fundraiser for Rep Knotwell.** Trenton Olson, President and Mike Sonntag, Lobbyist and Executive Director represented UAHU.

**June 7, 2018 – Executive Leadership Planning Meeting.** Craig Paulson, Past-President, Trenton Olson, President and Crystal Cowley, President-Elect welcomed and educated Carl Roestenburg to his new position as VP.

**June 20, 2018 - Leadership Training** meeting conducted and training of board and executive board occurred.

**June 20, 2018 - Strategic Planning** meeting conducted. Next service year's focus will include agent recruitment/engagement. We plan to grow membership while targeting larger agencies and the Medicare agent community. We will continue our focus of receiving specific NAHU awards (provide a road map of expectations), and a balance budget.

**June 25, 2018 – Media Campaign** begins. UAHU Campaigns to educate public on the role of an agent and on the importance of finding an agent during open enrollment. Request and assign committee members to write editorials, OpEds and Press Releases about general healthcare topics and focus on open-enrollment and encouraging public to find an agent. This can be done by visiting the [www.nahu.org](http://www.nahu.org) Find-an-Agent link.

**June 23 – 26, 2018 – NAHU National Convention** – Craig Paulson, President, attended. UAHU received the Landmark award, the Presidential award, the State Website award and the Public Service (William F. Flood) award.

**July 11, 2018 - CE luncheon at IMC.** About 60 people attended.

**August 7, 2018** – 1pm Executive Board Meeting and 2pm to 4pm General Board Meeting. Action items followed up on and new action items assigned.

### **August 9, 2018 - DOI Discussion**

Craig Paulson, Past-President, Mike Sonntag, Lobbyist, and Carl Roestenburg, VP met with DOI officials Tanji Northrup, Deputy Commissioner, Heidi Clausen, Ass't Div. Director, & Jaak Sundberg, Health Actuary at the Department of Insurance.

### **Topics of discussion included;**

1. Options to stabilize the Utah health insurance market.
2. The biggest hurdle to making changes is the feds.

3. The ACA remains the law of the land.
4. The Department is carefully reviewing State laws and federal rules regarding association health plans. A Department bulletin will be released soon.

**August 15-17, 2018 – Regional Leadership Conference** - Utah was fortunate to host the meeting at the Zermatt Resort. Ray Magnussen did a terrific job. Several UAHU board members attended along with Ryan Thorn, NAHU Past-President.

**August 28, 2018– Meeting with Steve Morrison, EMI Health President.** Discussions included thanking EMI Health for their contributions to UAHU. Thanking them for allowing us to utilize their board room for 2018-2019 and asking Steve for the support of EMI Health at Day on the Hill and Sales Congress. Steve also committed to having the VP of Sales and all Account Executives join UAHU. Steve kindly followed through on all commitments and we are greatly appreciative.

**August 31, 2018 - Free Market Restoration Healthcare Committee** led by UAHU member, Don Ruzika. Committee includes leaders from various healthcare companies, insurers and the UT Department of Insurance. UAHU represented by Crystal Cowley, President-Elect and Trenton Olson, President.

**September 11, 2018 – 1pm Executive Board Meeting** and 2pm to 4pm **General Board Meeting.** Action items followed up on and new action items assigned.

**September 12, 2018 – Fall Seminar - 6 Hour Day of CE** held at IMC. Roughly 125 attendees. A great success and boost to the UAHU budget. Topics included:

- *9:00 am – Medicaid Expansion – Nathan Checketts – Deputy Director, Department of Health*
- *10:00 am -Health Care Plan Self-Funding (and Partial Self-Funding) Foundations*
- *11:00 am – Protecting Self-Funded Health Plans against Catastrophic Risk; Stop Loss Concepts*
- *Noon – Thank you to Select Health for sponsoring lunch.*
- *12:30 pm – Connecting Health & Wealth with HSAs*
- *1:30 pm – Small Group ACA vs. Level-funding Options*
- *2:30 pm – Large Group Underwriting Principles*

**September 21, 2018 – Fundraising Event for Jim Dunnigan** – Craig Paulson, Matt Spencer, Trenton Olson, Ernie Sweat and Mike Sonntag attended.

**October 9, 2018 – 1pm Executive Board Meeting** and 2pm to 4pm **General Board Meeting.** Action items followed up on and new action items assigned.

**November 13, 2018 - 1pm Executive Board Meeting.** Action items followed up on and new action items assigned.

**December 11, 2018 - 1pm Executive Board Meeting.** Action items followed up on and new action items assigned.

**January 8, 2018** – 1pm **Executive Board Meeting** and 2pm to 4pm **General Board Meeting**. Action items followed up on and new action items assigned.

**January 16, 2018** – Executive Committee interviewed and hired Heather Bennett, UAHU Executive Admin.

**January 24, 2018** – **Carrier Meeting with Gold Sponsor – SelectHealth**. Met with Janica Blackhust, Director of Broker Relations and David Lemperle, VP of Sales.

Agenda:

- Thank you for your support!
- From your perspective, what can UAHU do to improve?
- How can UAHU continue to earn your support?
- What legislative issues could UAHU support that would be helpful to you as a carrier?
- What areas of education, training, and support would you encourage UAHU to cover so that the members are more qualified to market your products?
- Can we do more to increase the number of UAHU members from SelectHealth?

**January 30, 2018** – **11<sup>th</sup> Annual Day on the Hill** - This year's Day on the Hill was a big success due to the partnership with the carriers (EMI Health, HSA Health Plan, Regence BCBS, SelectHealth, U of U Health Plans, Health Equity & UHC) and our UAHU members. Together, we mingled with over 90% of our state law makers. Topics of discussion over dinner with legislators included:

**Balance Billing**- UAHU in favor. Rep. Dunnigan is making good progress and has an agreement with the Hospital Association and Blue Cross.

- Working out details with Doctors/Specialist, and other organizations.

**Medicaid Expansion**- There are many versions proposed since this was voted by the people on Prop 3.

- As proposed, it will go bankrupt within a few years, UAHU supports a more sustainable plan.
- If approved multiple people (estimated 41K) will qualify for Medicaid, and subsequently lose their low-cost exchange plan.
- UAHU supports a more responsible plan that will help-out those in need for the long term.

#### **Mandate Bills**

- Elaison- Exome DNA testing. Only applies to PEHP and Medicaid.
- Mayne- Stage Four Cancer Pharmaceutical requirements. Bill was pulled by the sponsor
- Ray- Athletic Trainer bill. Never came out of rules.

**HealthCare Transparency** – UAHU supports transparency in all aspects of Health care.

#### **Media Campaign Hits Highlights**

**February 13, 2018** – **CE Luncheon**. 65 people attended.

**February 13, 2018** – **UAHU Operation Engage & 4<sup>th</sup> Street Clinic Fundraiser** kicked off with email campaign and announcement at the CE luncheon.

**February 21, 2018 - Carrier Meeting with Silver Sponsor – HSA Health Plan.** Met with Russel Trujillo, Co-founder of the company.

Agenda:

- Thank you for your support!
- From your perspective, what can UAHU do to improve?
- How can UAHU continue to earn your support?
- What legislative issues could UAHU support that would be helpful to you as a carrier?
- What areas of education, training, and support would you encourage UAHU to cover so that the members are more qualified to market your products?
- Can we do more to increase the number of UAHU members from HAS Health Plan?

**February 24 – 27, 2018 – NAHU Capitol Conference in DC.** Trenton Olson, President; Carl Roestenburg, VP, Martine Smith, Past-Executive Director; Steve Nielson, Legislative Chair; Karen Leonardi, Northern Utah Chapter President; Tim Kendall, Northern Utah member; Ryan Thorn, NAHU Past-President and Scott Deru, UAHU Past-President attended. We meet with our all of our US lawmakers, and/or members of their staff. They included: Senator Romney, Senator Mike Lee, Rep. Ben McAdams, Rep. John Curtis, Rep. Rob Bishop, and Rep. Chris Stewart.

**March – April 2018 – New Membership Campaign Blast** – Email blasts and follow up emails and phone calls from the General Board.

**March 12, 2018** - 1pm **Executive Board Meeting** and 2pm to 4pm **General Board Meeting**. Action items followed up on and new action items assigned.

**March 13, 2018 – Spring Ethics Seminar/Day of CE** – Fantastic attendance! 210 registered.

Agenda:

- *9 am – 11:50 – 3 Hours of Ethics offered and presented by Neal McLaughlin, Senior Regional Account Executive, The Hartford*
- *Noon – 12:30 pm – Lunch sponsored by SelectHealth*
- *12:30 pm- 1:20 pm – Medicare 101/Long Term Care Insurance presented by Matt Gibson and Phillip Pay, SBIS.*
- *1:30 pm – 2:20 pm – Past, Present and Future of Medicare Supplements, Medicare Advantage and Part D. Presented by Shannon Drotning, Cambia, Director of Medicare Sales.*
- *2:30 pm – 3:20 pm – What You Need To Know About Social Security – Tyler Williamson, Capital Financial Group*

**March 19, 2019 – Carrier meeting - Regence BCBS** - UAHU Executive Board members Carl Roestenburg, VP and Craig Paulson, Past-president meet with Regence BCBS of UT officials. Representing Regence was Doug Boudreaux, VP of Sales, Miguel Rovira, Director of Business & Community Relations, Tina Davis, Medicare Sales Exec. (UAHU Communications Chair), and Jennifer Olsen, Sales & Renewals Manager.

## **Topics of Discussion**

- Gratitude expressed for Regence supporting UAHU.
- UAHU goal to engage agents from larger agencies.
- Sales Congress and sponsorship opportunities. Tina will forward list of opportunities to Doug.
- Regence Account Exec. (AE) Currently need to pay for UAHU membership dues from their small budgets.
  - Regence willing to consider paying for UAHU dues outside of AE budget. Possibly through Sales department or Government Affairs department.
  - NAHU offers group list bill for membership dues that's also owned by carrier/agency. Craig to provide details to Tina so she can forward to Doug.
- Day on the Hill
  - UAHU available to support and partner with Regence on aligned political issues.

## **Media Campaign Hits & Highlights**

### **Press Releases**

1. Announcement of UAHU Sales Congress (5/8/19)
2. Results of UAHU Sales Congress (6/4/18)
3. UAHU Public Service Award (7/11/18)
4. Presidential Citation Award (8/6/18)
5. UAHU Gold Certification (10/1/18)
6. UAHU Day on the Hill Event (1/28/19)
7. Announcement of 4<sup>th</sup> Street Clinic Fundraiser (3/15/19)
8. UAHU Landmark Award (3/19/19)
9. UAHU State Website Award (Pending)
10. Results of 4<sup>th</sup> Street Clinic Fundraiser (Pending)

### **Op Ed's**

1. Utah Proposition 3 (10/17/18)
2. Utah Medicaid Expansion (1/31/19)
3. Medicaid Expansion - Craig Paulson/Jonathan Johnson, former candidate for governor (2/07/19)

## **Legislative Team Activities**

Multiple opportunities to testify before the Senate Health Committee regarding the importation of pharmaceuticals from Canada and the House Committee related to the Balance Billing initiative. Our Legislative Team also conducted several meetings with individual representatives on multiple occasions to discuss healthcare policy and process.