



Strategic Planning Session

**July 16, 2018
3:00 – 5:00 PM**

WEST on Western Avenue, OKC, 73118

AGENDA (Plan It, Do It, Check It, Analyze It)

- In following our Mission Statement, we will continue to promote **the activities and ethical conduct** of insurance professionals through **communication, continuing education, increasing industry knowledge and influencing legislation.**

- My goals: **Lead, Organize and Delegate**

Stay Member Centered

**Top 3 Priorities EDUCATION, ADVOCACY &
PROFESSIONAL DEVELOPMENT**

- Chapter Goals

1. Membership Growth

2. Communication

- Weekly emails
- Newsletters

Operation Shout Promotion
Drawing for Free OKAHU Mug

HUPAC

3. Education / Ethics / Legislative

Meeting Dates

July 12

Aug 9

Sep 13

Oct 11

Nov 8

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P.O. Box 12146 ● Oklahoma City, Oklahoma 73157-2146

Dec NO MEETING

Jan 10

Feb 14

March 14

April 11

May 9

June 13

4. Symposium(s) TBD
5. Day at the Capitol (influencing legislation)
6. NAHU Course (increasing industry knowledge)
7. NAHU President Visit
8. Corporate Sponsorships
9. Objectives
 - Any months to offer 2 hours CE?
 - Which month(s) to offer Symposium?
 - Which month is NAHU President coming to Oklahoma?
 - Which month do we want as our Legislative Update?

Tasks will be developed once the Objectives are defined.

Does each Board Position support this strategic plan?

Input?

Changes?

- Budget discussion
- Funding Requests

Awards

Corporate Sponsor

Communications/Website

Education/Professional Dev.

Hospitality

HUPAC

Legislative

Media

Membership/Retention

Public Service

Committee Chair

Kelley

Megan

Ashley

Steve

Jana

Mike

Tom

Jeanean

Kelli

Theresa

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- **2018-2019 Board Year – Meetings & Events**

Board Meetings / The same (2nd) Thursday as the membership meeting

10:00 am Quail Creek Golf & Country Club
Call In Dial 1-641-715-3580 Meeting ID 973-874-457

Regionals (?)

Capitol Conference February 25 – 27, 2019 Hyatt Regency in DC

Nationals June 29 – July 2, 2019 San Diego