# Strategic Planning Session Task List

Goals for NABIP Alaska Chapter

1. Short Term
   1. Publish Calendar of Events
      1. Outstanding Programming
      2. Broaden the Reach of Topics
      3. Specific New Member Programming
      4. Committee Meetings
   2. Communication
      1. Scheduled Outreach to membership
      2. Member Engagement (Call to Action)
      3. Via Different Mediums
   3. Board Member Engagement
      1. Committees
      2. Active Participation
2. Long Term
   1. Develop Policy & Procedures
   2. Multi-Year Partner Engagement
      1. For and Non-Profit
      2. Professions in the Healthcare Industry
   3. Solid Financial Plan
   4. infrastructure in place for the long-term success of the organization
   5. Restart Golf Tournament

Board of Directors

1. Succession Planning with continuity and development for future leaders
2. Take advantage of resources provided by NABP in terms of membership support, professional development tools (toolbox), legislation, guidance/tools (tracker), etc.
3. Create a list of goals for the chapter short and long term.
4. Assign specific responsibilities to relevant chairs (membership chair, communications chair, PD chair) based on the goals identified.
5. Develop a 12-month calendar of events for better planning and communication.
6. Seek sponsorship opportunities to support chapter activities.
7. Develop policy and procedure (P&P) documents to provide a better foundation for the association.
8. The entire board is responsible for eliciting new and existing sponsors.
   1. Each board member should elicit sponsorship from potential sponsors; including vendors, colleagues, , TPA, PBM, and insurance carriers.
9. Build out Committee members and set reoccurring committee monthly meetings.

Business Manager

1. Expo dates to accommodate President’s Day.
2. Save the Date sent ASAP for Expo 2024.
3. Establish a cutoff date for registrations with consideration given to providing notice to catering services.
4. Utilize website for sponsor information: Ensure that all relevant sponsorship information is available on the Apricot website.
5. Update the website with the calendar of events.
6. Long Term
   1. Update website to be more appealing to the eye. Add a section for board member bio, headshot, and contact information.
   2. Chapter Improvement
      1. Ideas, Events, etc.
      2. Membership Packages
      3. Engage with other Chapters like NABIP Oregon Chapter
   3. Sponsorship Program Updates
   4. Data Back up
      1. Wild Apricot Site
      2. External Hard Drive
7. Short Term
   1. Provide a Task Request Document for BOD for submission to the Business Manager
   2. AI for Committee Meetings
   3. Content for the year planned.
      1. Committees to submit 2 months in advance their Content for CE approval.
   4. BOD meeting minutes within 5 business days after the meeting.
   5. Task List to BOD/Committee next day
   6. Create a central database of documents on the website for only board members to access documents and information.
   7. Text members information and reminders of events.
   8. New Name Tags with new logo
   9. Create sponsorship Commitment Tracker

Professional Development

1. Follow up with NABIP to discuss the outlined plans and collaboration opportunities.
2. NABIP Alaska Chapter provides value to membership through network opportunities, quality content, education, and events.
3. Maintain a balance between fun events/team building activities and professional development courses.
4. Consider partnering with online CE vendors for coupons or sponsorships.
5. Focus on creating opportunities for socialization and engagement.
6. Utilize resources provided by NABP for professional development, membership support, legislative, guidance/tools, etc… such as certification courses and compliance webinars.
7. Incorporate partial virtual events to cater to individuals from outlying areas or those with scheduling conflicts.
8. Research available certifications on self-funding, pharma account management, ICRA, voluntary benefits, consumer-driven health plans (HDHP), etc. Consider conducting certifications every other month or quarterly.
9. Reach out to Karin Woofter about Medicare information for a potential speaker during Medicare OE.

Communications

1. Develop a communication calendar to ensure effective communication among members.
2. Follow up on the national organization's process for sharing information and ensuring timely communication.
3. Take advantage of resources provided by NABP in terms of membership support, professional development tools (toolbox), legislation, guidance/tools (tracker), etc.
4. Improve communication about events by using tools through Wild Apricot.
5. Consider creating newsletters again to improve member engagement and provide regular updates.
6. Increase social media posting frequency for better promotion and visibility.
7. Determine how many blasts are normally done and decide on a communication schedule.
8. Set up automated email reminders for registration at six weeks, four weeks, two weeks, and one week before each event.
9. Determine the best way to communicate with members, especially younger individuals.
10. Consider recording a monthly message from the president in the newsletter.
11. Explore options for video communication, such as member spotlights or professional development talks.
12. Decide on the frequency of videos (monthly, bi-monthly, or quarterly).
13. Connect with Lori Vicory and Ashley Snodgrass to address issues with social media platforms (Facebook, Instagram, and LinkedIn). Coordinate with Holly as communications chair to resolve social media login issues.
14. Draft a 1–2-minute speech about upcoming events for a video communication.

Legislative

1. Stay updated on legislative updates through the Washington update newsletter from John Green at NABP.
2. Take advantage of resources provided by NABP in terms of membership support, professional development tools (toolbox), legislation, guidance/tools (tracker), etc.
3. Legislative Priorities for the 23/24 year
4. Day on the Hill Scheduled and planned.
5. Review NABIP State Legislative Tracker effectiveness for our chapter. Would we need to contract with Jeff Logan?

Membership

1. Explore strategies to effectively reach and engage members across our large geographical area
2. Familiarize new members with NABP structure, including national association, regions, state chapters, and their respective roles.
3. Prepare for upcoming major events organized by NABP (e.g., Capital Conference) and consider applying for scholarships available for first timers attending these events.
4. Take advantage of resources provided by NABP in terms of membership support, professional development tools (toolbox), legislation, guidance/tools (tracker), etc.
5. Engage non-members by organizing events.
6. Explore new types of membership, such as associate memberships or targeting insurance professionals from different industries like benefit directors or employers outside the broker-carrier community.
7. Potential sources for attracting new members who are interested in legislative updates related to healthcare industry changes in Alaska.
8. Explore the possibility of offering incentives, such as free membership or entrance fee discounts, during fun events.