

**IAHU Board Meeting  
January Meeting Minutes  
January 9th, 2018**

**Called to Order:** The January 9th , 2018 Board Meeting of the Iowa Association of Health Underwriters was called to order by President Thams at 3:02 PM. The Meeting was held at Delta Dental.

**Members Present --** Thams, West, Hitchcock, Elam, Schreder, Mueller, Evans, Strouse.

**Members on Phone --** None

**Members Absent --** Jedlicka, Meek-Anderson, Shireman, Lindsay

**Secretary/Treasurer Report: Bob Lindsay** No board meeting in December so there are no minutes or finance report to review, publish or approve.

Discussion - the Board discussed the budget for the rest of the year.

**President Elect's Report/Symposium: Mike Elam** Have a meeting this Thursday with the Marriott meeting planners to review scheduling for the symposium. Probably going to not do the fitness walk again. Discussed registration fees for early, non-member and members.

**Past President/HUPAC: Lynn Schreder** Hand out list of board members, trying to recruit five more capital club members to HUPAC.

**Programs/Education: James West** Had committee conference call yesterday finalizing programs for Jan-July 2018. Discussed venues and ideas to focus on quarterly CE meetings outside of Des Moines. Stick to third Thursdays for consistency.

**Member Services: Joe Evans** Hand out December Committee report. Current membership is 196 vs 198 in November. Discuss working projects and contest for later this quarter. Hand out IAHU Membership Survey results and discuss results. Evans used Survey Monkey for the survey and is going to publish the final results and send to all board members.

## At Large Reports:

Western Iowa No Report  
Karey Meek-Anderson

Eastern Iowa No Report  
Rick Jedlicka

Corporate Sponsors Hand out and discuss 2017 sponsor appreciation packages. Mueller will  
Cassandra Mueller make changes and send out to board members.

Communications:  
Tracy Hitchcock

Hand out Communication Update. We are in good shape with communication with our association; still working on new logo and website resources. Setting up conference call for board members to review possible resources.

Discussion about Larry Blixt. Questions: Doe's IAHU need Lobby support? Has Larry done his job in the past? It is unclear and we agree as a board that we are not getting \$15k worth of effort. How about a different financial level?

\$7,500. Gets us bill monitoring, communicating with our board-members (Marcie), improve communication going forward so we can push out more pertinent information to our membership. Larry will set appointments with legislators for Day on the Hill visits.

Motion made by West to go forward with new funding level of \$7,500.  
Second made by Schreder - vote - unanimous  
Motion passes.

Marcie will tell Larry we will pay \$7,500. And reset expectations with authorization to pay more to Larry (up to \$10,000.) if necessary.

Awards:  
Greg Shireman

No Report

Government Relations:  
Marcie Strouse

Suggest everyone read what Governor Reynolds said today at Iowa Capitol.  
There is a huge focus on healthcare issues for the State of Iowa

President's Report: Hand out proposed 2018/19 IAHU Board of officers and Directors.  
Todd Thams

Old Business: Logo update

New Business: Discussion and possible action with Larry Blixt contract.

Meeting adjourned: 5:32 PM



## IAHU Membership Committee Report – 12/21/17

Committee Members: Dennis Fratella, Justin Mohning

*Current Membership: 196 association members (vs 198 last month)*

### New Iowa Membership since 7/1/17:

Full_Name	Company	Join_Date	Email
Ms. Michelle Henaman	Aetna	12/21/2017 0:00	henamanm@aetna.com
Amanda Comer	UnitedHealthcare	12/18/2017 0:00	mandi_comer@uhc.com
Roshawn Gnewuch	Holmes, Murphy	10/20/2017 0:00	rgnewuch@holmesmurphy.com
Melanie Russell	KHI Solutions	10/12/2017 0:00	melanie@khisolutions.com
Dominic Paige Bottenfield	Aetna	8/25/2017 0:00	bottenfield12@hotmail.com
Sheila Nelson	Delta Dental of Iowa	8/1/2017 0:00	snelson@deltadentalia.com
Debra Phillips	Aetna	7/28/2017 0:00	dkphillips@aetna.com
Tiffany Bomer	Wellmark, Inc.	7/26/2017 0:00	bomertj@wellmark.com
Marla Melco	Delta Denal of Iowa	7/24/2017 0:00	mmelco@deltadentalia.com
Phil E. Waniorek, Jr.	Benefits, Inc.	7/18/2017 0:00	phil@benefitsolutions.us
Howard Eaton, EMBA	AFLAC	7/7/2017 0:00	heaton@aflac.com

### Lapsed Iowa Membership since 7/1/17:

Full_Name	Company	Paid_Thru	Email
Jennifer Stahle	Mercer	1/31/2018 0:00	jennifer.stahle@mercerc.com
David L. Kline, CHC	Agency Bloc	10/31/2017 0:00	DavidLeeKline@gmail.com
Austin Vogt	The Vogt Group	9/30/2017 0:00	austin@thevogtgroup.com
Lindsay Buenzow	Wellmark	8/31/2017 0:00	buenzowl@wellmark.com
Linda Clause		7/31/2017 0:00	clause.linda@gmail.com
Amanda Comer		7/31/2017 0:00	

### 4<sup>th</sup> Quarter Working projects:

- Continue sending welcome emails to all new members.     -Justin will be making calls to any lapsed members.
- Monthly strategic calls to confirm any work assignments.     -Stay focused on committee mission and responsibilities:
- Everyone focus on driving new membership:     -Dec existing membership survey
- Dec/Jan membership campaign:     Dennis – send out flyer and application to all Acumen agents.  
Joe – send out flyer to other GA contacts to go out to GA producers

Create better surveys faster. Upgrade to add users and get team collaboration tools. [View pricing](#) »

# IAHU Membership Survey



SUMMARY → DESIGN SURVEY → COLLECT RESPONSES → ANALYZE RESULTS

CURRENT VIEW

RESPONDENTS: 44 of 44

Export All

+ FILTER + COMPARE + SHOW

QUESTION SUMMARIES DATA TRENDS INDIVIDUAL RESPONSES

Filter by Question and Answer >

Filter by Collector >

Filter by Completeness >

Filter by Time Period >

Filter by Respondent Metadata >

Filter by A/B Test >

CANCEL

SAVED VIEWS (1)

EXPORTS

SHARED DATA (1)

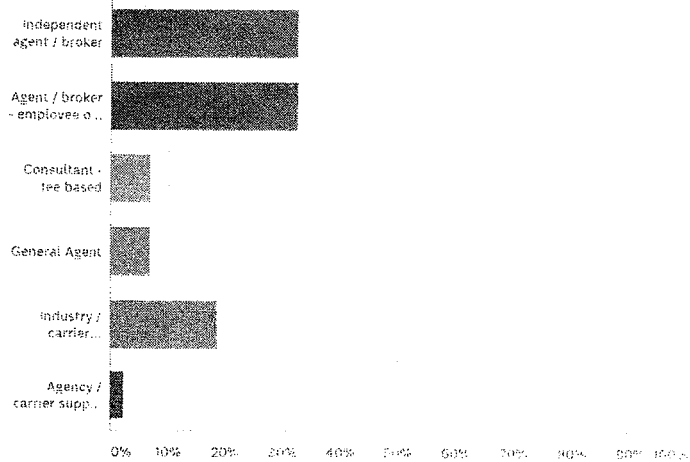
Page 1

Q1

Customize

What best describes you professionally:

Answered: 43 Skipped: 1



ANSWER CHOICES

RESPONSES

Independent agent / broker

27.56%

Agent / broker - employee of an agency

20.93%

Consultant - fee based

5.94%

General Agent

5.98%

Industry / carrier representative

13.51%

Agency / carrier support staff

2.13%

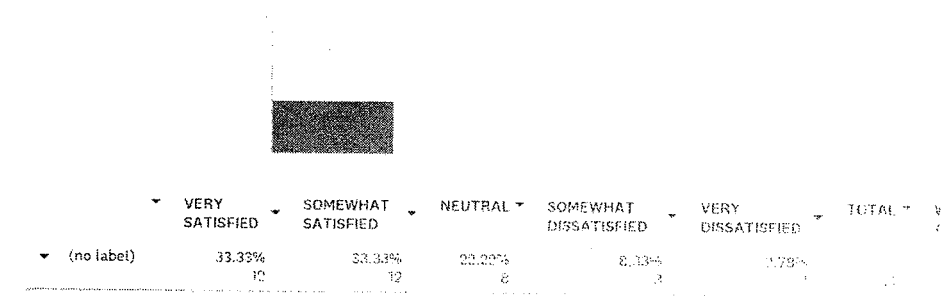
TOTAL

Q2

Customize

How would you rate you IAHU membership experience?

Answered: 36 Skipped: 8

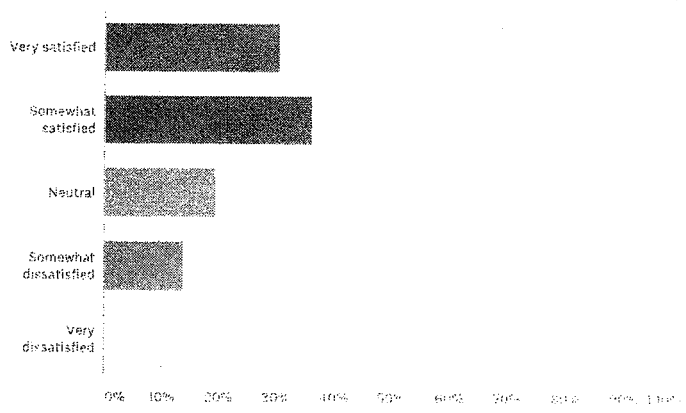


Q3

Customize

How would you rate your membership program - including CE meetin

Answered: 36 Skipped: 3



ANSWER CHOICES

RESPONSES

Very satisfied	12 (33.33%)
Somewhat satisfied	12 (33.33%)
Neutral	8 (22.22%)
Somewhat dissatisfied	3 (8.13%)
Very dissatisfied	1 (2.78%)

TOTAL

Q4

How can we add more value to your membership?

Answered: 22 Skipped: 22

RESPONSES (22) TEXT ANALYSIS MY CATEGORIES

PAID FEATURE

Use text analysis to search and categorize responses; see frequently-used words and phrases. To use Text Analysis, upgrade to a paid plan.

UPGRADE Learn more »

Categorize as... Filter by Category 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22

Showing 22 responses

I'm hoping to take advantage of IAHU more in 2018

12/28/2017 7:52 PM

View all responses

I remain disappointed that the 2017 annual meeting was so much more disappointing than the 2016 annual meeting. Now that I see meeting will also be at The Downtown Marriott I am leaning towards NOT attending.

12/22/2017 4:13 PM

View response

More educational opportunities offered on a monthly or every other month basis.

12/21/2017 3:07 PM

View response

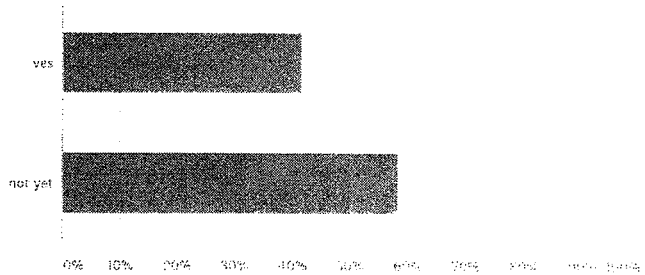
< [Previous responses]

Q5

Customize

Are you aware of your members-only discounts?

Answered: 35 Skipped: 3



ANSWER CHOICES

yes

RESPONSES

41.6%

not yet

58.4%

TOTAL

Q6

Do you have any program ideas for membership meetings you would share?

Answered: 15 Skipped: 25

RESPONSES (15)

TEXT ANALYSIS

MY CATEGORIES

PAID FEATURE

Use text analysis to search and categorize responses; see frequently-used words and phrases. To use Text Analysis, upgrade to a paid plan.

UPGRADE

Learn more

Categorize all

Filter by Category

1/15

Showing 15 responses

Move the June, 2018 annual meeting

12/23/2017 4:15 PM

View response

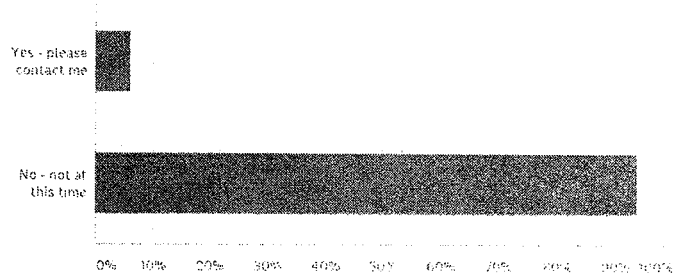
State of the Market going forward

Q7

Customize

Would you like to learn more about serving on a committee?

Answered: 33 Skipped: 11



ANSWER CHOICES

RESPONSES

- Yes - please contact me
- No - not at this time

6.06%  
93.94%

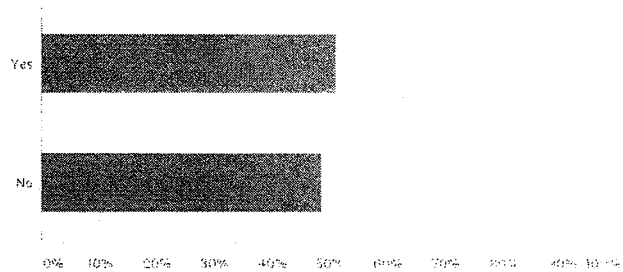
TOTAL

Q8

Customize

Did you attend our Annual Symposium this year?

Answered: 37 Skipped: 7



ANSWER CHOICES

RESPONSES

- Yes
- No

51.35%  
48.65%

TOTAL

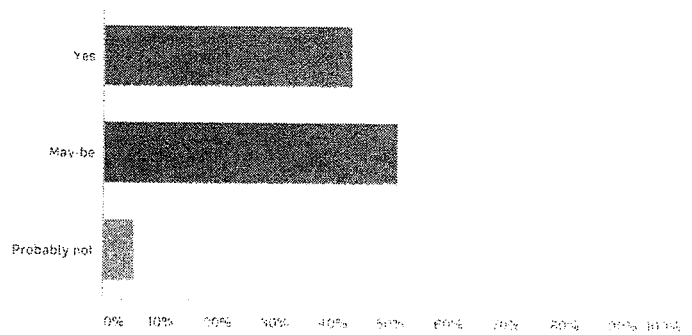
Q9

Customize



### Will you be attending the Annual symposium next year?

Answered: 37 Skipped: 7



**ANSWER CHOICES**

▼ Yes

▼ May-be

▼ Probably not

**TOTAL**

**RESPONSES**

43.04%

51.35%

5.41%

### Q10

### What is most important to you for having your IAHU / NAHU member

Answered: 26 Skipped: 18

**RESPONSES (26)**

TEXT ANALYSIS

MY CATEGORIES

**PAID FEATURE**

Use text analysis to search and categorize responses; see frequently-used words and phrases. To use Text Analysis, upgrade to a paid plan.

**UPGRADE**

[Learn more](#)

Categorize as...

Filter by Category

Showing 1 - 6 of 26 responses

Showing 26 responses

Keeping informed - networking with other agents

1/3/2018 4:55 PM

[View response](#)

Industry representation in government

12/23/2017 10:50 AM

[View response](#)

interaction with fellow members.

12/22/2017 4:12 PM

[View response](#)

I truly value the daily NAHU email updates and IAHU website information

12/21/2017 4:15 PM

[View response](#)

industry education and trends

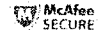
12/21/2017 1:27 PM

[View response](#)

daily industry newsletter and the continuing education

ENGLISH

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JUNE 7TH & 8TH 2017

Marriott Downtown  
Des Moines, IA 50309  
Copper Creek

**Benefits for all Sponsors**

- **BOOTH (EXCEPT GOLF ONLY SPONSORS)**
- **SIGNAGE IN COMMON AREAS OF SYMPOSIUM & ALL OTHER MEETINGS**
- **OPPORTUNITY TO PROVIDE COMPANY MATERIALS FOR REGISTRATION BAGS**
- **COMPANY LISTED ON IAHU WEBSITE**
- **LIST OF ATTENDEE EMAIL ADDRESSES PRIOR TO SYMPOSIUM**

C/O Prisma Strategies  
Marcie Strouse  
1501 Ingersoll Ave., Suite 200  
Des Moines, IA 50309

Phone: 515-244-3692  
Fax: 888-866-7804  
Email: marcie@prismastrategies.com

# 2017 IAHU Annual Symposium

## HELPING IOWANS THRIVE

### Sponsor Appreciation Packages

#### ~~\$15,000 PLATINUM SPONSORSHIP~~

~~Company banner posted in prime location during Annual Symposium~~

~~Three annual IAHU/NAHU memberships~~

~~Ten Symposium Registrations~~

~~Speaking opportunities at other IAHU meetings~~

~~Own a Hole at Golf Event~~

~~Foursome at Golf Event~~

#### \$5,000 GOLD SPONSORSHIP

Company banner posted during Annual Symposium

*preferred or comp parking*

~~Two annual IAHU/NAHU memberships~~

*VIP Coffee*

Six Symposium Registrations

*VIP Dinner invite plus guest*

Speaking opportunities at other IAHU meetings

*Booth location preference*

~~Own a Hole at Golf Event~~

*Workshop speaking opportunity*

~~Foursome at Golf Event~~

*Photos with key note speaker*

#### \$2,500 SILVER SPONSORSHIP

*\* access to green room \* photo with VIP's*

Signage during Annual Symposium

*VIP Coffee*

~~One annual IAHU/NAHU membership~~

*VIP Dinner*

*access to green room*

Two Symposium Registrations

*Workshop opportunity @ Symposium mtg.*

Speaking opportunities at other IAHU meetings

*preferred or comped parking*

~~Signage for Hole at Golf Event~~

#### \$1,500 BRONZE SPONSORSHIP

Signage during Annual Symposium

~~One annual IAHU/NAHU membership~~

*VIP Coffee*

One Symposium Registration

~~Speaking opportunities at other IAHU meetings~~

*NO GOLF*

#### ~~\$750 GOLF SPONSORSHIP~~

~~Own a Hole & Foursome at Golf Event~~

## Communications Update

### Iowa AHU Meeting – January 9, 2018

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#### New Marketing Support for 2018

Objective – New & improved marketing support for the Iowa AHU chapter in 2018

- New website
- Logo
- Communication support – i.e. software for newsletters and alerts, social media, promotional assistance
- Event planning

Action – Solicited a handful of marketing firms that could satisfy the objective – some of the parties engaged can be a single-source provider while others cannot

Status – There are currently 3 vendors that I'm closely evaluating for a partnership

- Diversified Management Services – <https://www.assoc-mgmt.com/>
- Double UU Marketing – <https://doubleyoumarketing.com/>
- Star Chapter Association Management in conjunction w/ an Executive Director – i.e. Joe Pittman – <http://www.starchapter.com/> (link)

Tracy's Questions for the Board of Directors –

- Do we need a Board-level majority or vote to move ahead w/ a new marketing plan?
  - If so, would a conference call on either of the following dates work: 2/23 or 2/25?
- Do any other Board members wish to be involved in the communication to Jacque Meyer and/or a part of the transition plan to our new partner?
- What help specifically do we need for the Symposium – i.e. event planning? Please be specific.

## **IAHU Board for 2018-2019**

### **Officers:**

**Past President/HUPAC Chair      Todd Thams**

**President                                      Michael Elam**

**President-Elect**

**Secretary/Treasurer                      Bob Lindsay**

### **Directors:**

**Membership Chair                              Joe Evans**

**Programs Chair                                      James West**

**Communication Chair                              Tracy Hitchcock**

**Government Relations Chair                      Marcie Strouse**

**Awards Chair    Greg Shireman**

**Corporate Sponsor Chair                              Casandra Mueller**

**At Large-Eastern IA Programs                      Rick Jedlicka**

**At Large-Western IA Programs                      Karey Meek-Anderson**

**Section 1.** The Board of Directors shall consist of the officers and up to eight other elected Directors – including up to three (3) at-large Directors representing the Western, Central, and Eastern sections of Iowa. These at-large members will have full voting rights.