

ANNUAL SUMMARY REPORT OF ACTIVITIES AND ACCOMPLISHMENTS

4/1/16 – 3/31/2017

April 2016: OCAHU held its 20th Annual Take a Swing for the Cure Golf Tournament benefiting Cystic Fibrosis Foundation of Orange County. Raised \$21,503 (a new record!) which was donated to Cystic Fibrosis. Over 90 golfers joined in the fun with more members and guest joining us for dinner.

May 2016: Our Annual Election of the Board of Directors Meeting and Membership Recognition day was held as our 2nd OCAHU Oscars where we recognized members for their length of time with OCAHU, RHU, REBC, LPRT members, and other milestones.

Our 2016-2017 Board continues to mirrored our membership with Carrier Reps, independent brokers, General Agents and Field Marketing Organizations with a mix of Large and small group, individual, Medicare and ancillary plans represented. Our board members range in ages from 29 to above age 70.

Eight of our OCAHU members went to the Capitol Summit in Sacramento where they met with senators, legislators and aides to discuss issues important to our industry.

OCAHU also hosted a PAC Fundraiser at Angel Stadium. Good food, fund raiser drawings and lots of fun were enjoyed by over 40 attendees!

June 2016: OCAHU held its 14th Annual Celebration of Women in Business Fashion Show and Luncheon at a new location, the Paseo Hotel and Resort in Huntington Beach. We raised \$44,713 (another new record!) to benefit New Hope Grief Support Community. Again all monies received above our costs donated to the charity.

We completed a Leadership training and Strategic planning meeting for new Chapter year and recognized our departing Board Members for their service.

We had 10 OCAHU members attended the NAHU Annual Convention Albuquerque, New Mexico. At this meeting two of our members were recognized with awards: Don Goldmann received the Michael D. Gray Award for his HUPAC giving and Maggie Stedt received the Distinguished Service Award.

- OCAHU won the William Flood Public Service Award for the sixth consecutive year.
- Won the Pacesetter Award for the fourth consecutive year at the annual NAHU convention.

August 2016: OCAHU Partnered with IEAHU and SDAHU to conduct the Annual Medicare Summit at Pala Casino. 120 Senior Carriers and Vendors in

attendance and over 450 attendees. OCAHU members Bob Stiffler and Patrick Freeman were each awarded the Quilt of Valor in recognition for their military service.

OCAHU hosted the Region 8 meeting in Anaheim. OCAHU was recognized for the most new members of all the Region 8 chapters!

September 2016: Held Annual CE Day with over 300 attendees and offered 4 CE credits.

Presented donation checks to Cystic Fibrosis Foundation and New Hope Grief Support Community.

October 2016: In conjunction with Health Insurance Awareness Week a program was presented on SB 281 and the New Conversation Around LTC Planning presented by Maxwell Schmitz.

November 2016: Due to the Fourth Quarter sales activities for Individual, Group and Medicare business lines, OCAHU did not hold a membership meeting.

OCAHU was recognized as an honoree at the National Philanthropy Day at the Grove in Anaheim.

December 2016: Michael Brandt presented “How to Build Your Business with Social Media” at our monthly member meeting. We held our annual toy drive with the toys donated to the California Highway Patrol Chips for Kids program.

January 2017: Marilyn Monahan presented a program on “Health and Welfare Plan Compliance Checklist for Agents and Their Employer Clients

A mid-year Strategic Planning meeting was held by the Board in January.

February 2017: Held our Annual Business Development Summit with over 300 attendees. Pat Stiffler, LPRT was named the OCAHU Pinnacle Award winner. We gained fourteen new members that day! Our theme was “Make Health Care Great Again!

Eleven OCAHU members attended the NAHU Capitol Conference in Washington, DC. They met with various members of Congress and the Senate to discuss pending legislation important to our industry.

March 2017: Annual Legislation Day. CE course was given by Julianne Broyles, CAHU lobbyist. Topic was HealthCare Reform and Legislative Updates. A New Member orientation was also held just prior the meeting. We also reviewed the NAHU website.

A Member Survey was completed in March that provided some valuable feedback for the Board in planning future meetings and interested candidates for the coming year's Board and committees.

Our first Luck of the Irish Casino Night was held to raise funds for our charities, New Hope Grief and Cystic Fibrosis. The 30 attendees had a great time playing card games and enjoying a Mexican Buffet.

Additional Comments:

- Our chapter has increased the publishing of the COIN newsletter to six times a year both in print and on line.
- Committees for the Golf Tournament, Women in Business and the Medicare Summit are hard at work for the up coming events
- We added 50 new members but continue to be challenged by our lapsed number. Our chapter has been impacted by members leaving the business and layoffs by carriers and GA's.
- We are especially proud of our increased PAC and HUPAC donations.
- We have also started an Adopt a Leg program
- Our Vanguard/Mentoring program is being formed and events are being planned!
- Our social media presence is increasing with a new Facebook page and our linked in and twitter activities!

OCAHU continues to be an active chapter that takes pride in its membership, meetings and dedication to local charities.