

ANNUAL SUMMARY REPORT OF ACTIVITIES AND ACCOMPLISHMENTS

April 2017 to March 2018

April 2017: OCAHU held its 21st Annual Swing “Fore” the Cure Golf Tournament benefiting Cystic Fibrosis Foundation of Orange County. OCAHU provided a donation of \$30,184 (a new record!) to Cystic Fibrosis. Over 100 golfers joined in the fun with more members and guest joining us for dinner. The Habit catering truck was a fun new addition for lunch!

May 2017: Our Annual Election of the Board of Directors Meeting and Membership Recognition day on May 16th was where we recognized members for their length of time with OCAHU, LPRT members, and other milestones. The members elected the New Board of Directors for the July 201-2018 term with Juan Lopez elected as our President fore the coming year.

Our 2017 - 2018 Board continues to mirror 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 30 to the 60's.

A panel consisting of Dorothy Cociu, Juan Lopez, and Ryan Dorigan with Rob Semrow presented “The State of the State – Getting Ready for the Single Payer Fight of the Decades. Don Goldmann provided a special Federal update

Nine 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 2017: OCAHU held its 15th Annual Celebration of Women in Business Fashion Show and Luncheon on June once again at the Paseo Hotel and Resort in Huntington Beach. We raised \$43,534 (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 on June 13th for new Chapter year and recognized our departing Board Members for their service.

OCAHU held our first Consumer Education and Town Hall for North Orange County on June 22nd which sold out in less then 4 days! There were over 120 attendees who heard from CAHU's lobbyist Faith Lane and staffers from Rep Trask's office. There was a panel presentation with Dorothy Cociu, Ryan Dorigan and Juan Lopez with Rob Semrow.

We had 7 OCAHU delegates and several additional members who attended the NAHU Annual Convention in New Orleans. At this meeting OCAHU was recognized with several awards:

- Won the William Flood Public Service Award for the seventh consecutive year.
- Won the Pacesetter Award for the fifth consecutive year at the annual NAHU convention.
- Won the prestigious overall Large Chapter National Champion – Overall Membership Award
- Recognized as a Gold Certified Chapter

July 2017: OCAHU held the South Orange County Town Hall Meeting in partnership with the Laguna Niguel Chamber of Commerce to address the issues and concerns of SB562. Lead by Dan Abrams this meeting drew over 150 attendees from the local community to the Laguna Niguel City Hall. Alan Katz, Dr. Jeffery Barke, Sen. Patricia Bates and Juan Lopez were our panelists!

OCAHU held a PAC Angels Baseball Game Fundraiser event on July 21st. Ryan Dorigan and his committee hosted over 50 attendees for a great event!

August 2017: OCAHU once again partnered with IEAHU and SDAHU to conduct the Annual Medicare Summit at Pala Casino on August 28th and 29th. There were 60 Senior Carriers and Vendors in attendance and over 550 attendees. The event expanded to two days of certification, CE classes, speakers with senior marketing and agent business focused classes, The Luau was a fun filled event!

September 2017: Held Annual CE Day on September 19th with the theme of “How to Grow Your Business” had attendance with over 300 attendees and offered 7 CE credit units!!! We were especially pleased and proud to have presented donation checks to Cystic Fibrosis Foundation and New Hope Grief Support Community.

Several OCAHU members attended the CAHU Retreat where our chapter received multiple CAHU Awards for 2016-2017:

- Outstanding Local Chapter Newsletter – Large Chapter
- Outstanding Local Chapter Website – Large Chapter
- Outstanding Chapter Membership Growth
- CAHU Presidential Citation Award – Patricia Stiffler

October 2017: OCAHU’s October 10th meeting featured Barbara Lewman who provided a 1-hour CE class on “ACA Helping Clients Navigate Compliance.”

November 2017: 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 2017: Our Annual Holiday Celebration was held at JT Schmidt's with our featured speaker Michelle Woodhall, Associate Director from CHOC's Children's Foundation. We held our annual toy drive with the toys donated to the CHOC Children's Hospital.

January 2018: Kristin Khale provided a one-hour CE on "The Rules of HSAs, FSAs and IRAs Today."

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

February 2018: Held our Annual Business Development Summit with over 300 attendees. "Trailblazing Brokers Leading the Healthcare Revolution." We honored Andrew Torelli as OCAHU 2018 Pinnacle Award winner in recognition of his service to OCAHU and our industry. We gained twenty new members that day! Mike Embry, NAHU's President led off the informational packed event!

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

March 2018: Annual Consumer Education Day: Leave Laws and Benefits Day. CE course was given by Marilyn Monahan. A New Member orientation was also held just prior to the meeting. The meeting also recognized the day and week and Health Awareness. We also reviewed the NAHU website.

President Juan Lopez and Past President Maggie Stedt lead a special ad hoc committee to review our by laws which have been submitted to the NAHU and will be presented to the membership for approval in our Annual Membership meeting in May 2018.

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.

OCAHU appreciates our Corporate Sponsors who provide us with outstanding support! Without their dedication our work would not be possible!

- Platinum: AGA, Kaiser Permanente and St. Joseph/Hoag Health
- Gold: Word and Brown, Opium Care

- Silver: Warner Pacific and IOA
- Bronze: Humana

Additional Comments:

- OCAHU is especially proud of our community outreach and leadership regarding the SB 562 proposed legislation and other issues. Two informative community meetings were held (Northern and Southern Orange County) with great attendance!
- Our award-winning COIN magazine continues to provide interesting and insightful articles. Our Committees for the Golf Tournament, Women in Business and the Medicare Summit are hard at work for the upcoming events
- We added 57 new members thru March 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.
- MaryAnn Trutanich VP of Professional Development hit it out of the park with the total number of CE class offerings this year at our many events!
- Our social media presence is increasing more connectivity with our Facebook page and our linked in and twitter activities!

OCAHU continues to be an active chapter that takes pride in its membership, meetings and support of local charities. Many of our members serve in roles beyond the chapter including state CAHU and national NAHU boards and other organizations. It is a Chapter that is dedicated to supporting our clients, our members and our industry!