

ANNUAL SUMMARY REPORT OF ACTIVITIES AND ACCOMPLISHMENTS

April 2019 to March 2020

April 2019: OCAHU held its 22st Annual Swing "Fore" the Cure Golf Tournament benefiting Cystic Fibrosis Foundation of Orange County. OCAHU provided a donation of \$24,000, (a new record!) to Cystic Fibrosis. Over 160 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! We also had "The Nail Truck" on site offering free manicures and pedicures to anyone who wasn't golfing. Held 2 types of raffles; silent and auction.

May 2019: Our Annual Election of the Board of Directors Meeting and Membership Recognition day on May 8th 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 2019-2020 term with MaryAnna Trutanich elected as our President for the coming year.

Our 2019 - 2020 BOARD Members OCAHU continues to mirror our membership with Carrier Reps. General Agency Reps, Independent Agents and Field Marketing Organizations with a mix of Large, Small, Individual, Medicare and Ancillary plan represented. Our board members range from 30 to 60 in age.

Ten 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.

June 2019: OCAHU's 2019-2020 Board held their Strategic Planning Meeting for the year. Each board member received a binder with OCAHU vision and mission statement, Roles and Responsibilities, bylaws, monthly Board Meeting expectations and reviewed action plan for each member.

We all logged in to NAHU's Leadership Video.

We also planned out our Calendar of Events for the year, matching it against CAHU's events so that there were no overlaps.

We created a budget for each event. We discussed who would attend NAHU's convention.

The President also informed the new Board Members of Hackers to please not to respond to any emails from her if it did not have the KP Logo.

OCAHU held its 17th Annual Celebration of Women in Business Fashion Show and Luncheon on June 5th. We changed the venue to Balboa Bay Resort in Newport Beach. We raised \$50,000 (another new record and a personal goal of Pat Stiffler, Chair of WIB & Board Member!) to benefit New Hope Grief Support Community. Once again, all monies received

above our costs was donated to the charity. This event sells out every year and 2019 was no different. The venue was just perfect.

We had 10 OCAHU delegates and several additional members who attended the NAHU Annual Convention in San Diego, CA. At this meeting OCAHU was recognized with several awards including:

- The Willian Flood Public Service Award
- The Pacesetter Award
- The Robert Osler Award for Professional Development
- Distinguished Service - Pat Stiffler

August 2019 OCAHU held their monthly Board meeting on Aug. 15th.

OCAHU Board members attended Region 8 Summit on the Queen Mary on Monday Aug. 25-26. Especially well received from new board members who were able to network and understand who they can reach out to in their similar role.

OCAHU partnered with IEAHU and SDAHU to conduct our Annual Medicare Summit at Pechanga Casino on August 27-29. There were over 80 carriers and vendors in attendance and over 900+ attendees. For the third year in a row, the event ran two days with certification, CE classes, breakout sessions, guest speakers and more.

OCAHU also hosted a Vanguard Event called Booze Tour. 35 attended, met at one location and then was bussed to 2 different breweries tasting many different beers.

September 2019 OCAHU held their monthly Board Meeting on Sep. 11

OCAHU hosted several in district meetings with our local legislators. A group of OCAHU board members including Past President, Ryan Dorigan, VP Leg, Dave Benson, President MaryAnna Trutanich and HUPAC, Cathy Daugherty met with **Lou Correa**.

OCAHU member President, MaryAnna Trutanich, VP Leg, Dave Benson, member David Duker met with **Harley Rouda**. OCHAU presented to these legislators' money to their campaign at their offices.

OCAHU President, MaryAnna Trutanich and VP Leg, Dave Benson attended an Open House for **Harley Rouda** new offices in Santa Ana. Both were invited.

OCAHU President, MaryAnna Trutanich, attend a community event for **Tyler Diep**. Again invited.

Held our Annual CE Day on September 10th. We had over 200 attendees and offered 5 CE credit units. Five different topics and speakers.

- Jeff Strong, Sterling Benefits on "you've got the bor, now what?"
- Jim Morrison, CAHU VP Legislation on Legislation Update
- Marilyn Monahan, ESQ, on Compliance Basics
- Paul Roberts, VP Professional Development on Social Media

- Paul Roberts, VP Professional Development on True North, Ethics

October 2019 OCAHU held their monthly Board Meeting on Oct. 8

Many OCAHU board and members attended the CAHU Health Summit, in Costa Mesa, Ca. on Oct. 3-5. OCAHU received a few awards.

- Large Chapter of the Year
- Outstanding Local Chapter Newsletter (second year in a row)
- Outstanding Local Chapter Membership Growth

Our Past President was recognized by CAHU President, Dave Fear, Jr.

- Ryan Dorigan- Member of the Year

OCAHU held a CE on Oct 8 on Employer Health Insurance Compliance and Notification Requirements. Speaker was Paul Roberts. This topic is historically well attended. We had about 60.

OCAHU held a PAC Event on Oct. 21st. Monday Night Football. Rams tickets were donated by Kaiser Permanente and raffled. 25 attended. The event netted \$250.00

November 2019 OCAHU held their monthly Board Meeting on Nov. 12

OCAHU hosted for all members on Nov. 14th at the Word and Brown offices, LIVE from NAHU Medical for All hosted by Janet Trautwein. Each attendee earned a CE credit

December 2019 OCAHU held their monthly Board Meeting on Dec. 20

Followed by our Annual Holiday Party at JT Schmid's. It was a happy hour type of event instead of our usual lunch. We wanted to try something different. Well attended. Membership was provided a "wish" list. All proceeds went to Orangewood Foundation a non-profit that offers struggles youth education and support. Humberto Rojas, represented Orangewood and spoke to our members on what they do,.

January 2020 OCAHU held their monthly Board Meeting on Jan. 14

OCAHU hosted at Word and Brown, LIVE Webinar from NAHU; On the Eve of the Iowa Caucuses. Hosted by VP of Government Affairs, Marcy Buckner.

OCAHU hosted, Conrad Parker from Rippling to speak. We had over 120 agents attend the event anxious to hear what he's up to next. Sue Wakamoto, PAC Chair from Region 8, hosted the question and answer segment.

February 2020 OCAHU will be sending 10 Board Members to NAHU's Capitol Conference on Feb. 24-26.

OCAHU will host its Annual Business Development Summit with over 350 expected to attend. "Today's Vision – Tomorrow's Reality" is the theme. The

event will take place on Feb. 28th. Nominees for OCAHU 2019 Pinnacle Award Winner are Robert Semrow, Barbara Salvi and John Evangelista. Winner will be announced at the event on Feb. 28th.

I am very proud of Paul Roberts and Jo Ann Vernon who has put together a dynamic event. All Exhibit booths are sold out (45). Of the 15 Partnerships available, 12 are sold. We have a packed agenda with 2 motivational speakers, 6 CE's to choose from, breakfast, lunch and Happy Hour. We will be encouraging attendees to join by offering a promotion and well as encourage PAC donations by educating what PAC is.

March 2020 OCAHU will host its monthly Board Meeting on March 10

OCAHU is hosting on March 10 from Cal Savers, information on California's New Employer Retirement Plan Mandates. Speaker will be Jason Gilbert. OCAHU is expecting high attendance.

Member survey will be sent out in March that will provide valuable feedback for the Board in planning future meetings.

OCAHU board and members will be attending the 2nd Annual CAHU Women's Conference in Las Vegas.

April 2020 OCAHU will host its monthly Board Meeting on April 14

Together with Inland Empire, OCAHU will host NAHU's Single Payer Certification Course. This course will be at Kaiser Permanente who will supply lunch for all attendees.

OCAHU Annual Golf Tournament, benefiting Cystic Fibrosis will be on April 20 at Alta Vista.

Corporate Partnership is a challenge and will continue to be so. Many Carriers are choosing between all the event we hold verses becoming a Corporate Partner.

OCAHU appreciate our Corporate Partners who provided us outstanding support. Without their dedication our work would not be possible!!!!

- Platinum; AGA & Kaiser Permanente
- Gold; Word and Brown & Beam
- Silver; Ease, Lively, Monarch Health Care and OSCAR
- Bronze; Confidio, CoveredCA, HealthNet and Sterling Benefits.

ADDITIONAL COMMENTS;

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. Its is a Chapter that is dedicated to supporting our clients, our members and our industry!

Our award-winning COIN Magazine not a newsletter a Magazine, continues to provide interesting and insightful articles. Our Committees for our Golf Tournament, Women in Business and the Medicare Summit are just the best in class. Hard working members for all the upcoming events. Adding members is a challenge not just with OCAHU but in all Chapters. However, with that said. We continue to add and not lose many.

Paul Roberts, VP of Professional Development has done just an Outstanding job in organizing CE's, Courses for our membership. Brent Buettner has done a great job keeping us in the Social Media limelight.