

**ANNUAL SUMMARY REPORT OF ACTIVITIES AND ACCOMPLISHMENTS**  
**May 2020 to April 2021**

**May 5, 2020:** OCAHU Board Meeting.

**May 27, 2020: CE on Globally mobile employees' healthcare needs are globally dynamic.** These employees benefit from having programs and health care solutions that are tailored to their unique and specific needs - helping improve the success of international assignments, boost productivity, and keep families safe. By the end of this overview, you will be able to:

- Recognize the importance of benefits for globally mobile travelers.
- Understand the standard products that are offered within the globally mobile space.
- Find globally mobile exposure on your current book of business.

**June 9, 2020:** OCAHU Board Meeting

**June 23, 2020:** This year the NAHU Annual Convention was held virtually. The positive is all Board Members were able to attend. At this meeting OCAHU was recognized with several awards including:

Pacesetter  
Presidential Citation  
Professional Development- Robert W Osler Award  
Public Service- William F Flood Award  
Website Award  
Media Relations Award  
Most New Members

**July 9, 2020:** First ever Virtual Strategic Board Meeting for OCAHU's 2020-2021. Each new 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.

**Our 2020 - 2021 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.

**July 14-August 14, 2020:** OCAHU held its 17th Annual Celebration of Women in Business Fashion Show and Luncheon virtually. We opened virtually bidding on baskets on July 14, announcing the winners on August 14. 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. The virtual event worked well.

**August 11, 2020:** OCAHU Board Meeting

**August 20, 2020:**

## Broker Masterclass: How to Win New Clients with Cold Email

The average benefits broker has to email 500 prospects just to get 1 qualified sales call with a new group. Imagine if you could consistently triple your meetings booked just by writing more effective cold emails? In this masterclass Matt Epstein, the CMO of Rippling-the first All-in-One HR platform built for brokers and their clients-will peel back the curtain of cold email and show you how to 3x your email conversion rate. From Zenefits to Rippling, Matt has sent millions of emails over the course of his career, and helped hundreds of brokers write killer cold emails.

In this webinar, you'll learn:

- How to find qualified leads and write cold emails that work
- How to get your email to the top of prospects' inboxes
- How to leverage Rippling's HR software in cold email to beat digital brokers and PEOs

**August 22-August 28, 2020: PUTT FOR PAC \$40** donation towards PAC. Time set up to deliver to attendees putting green, and golf balls. 4 putts/high score wins.

**August 26, 2020: CE on Ease Site Builder Summit** Intro to Ease, Impact of Technology on Small Business, best practices, setting up groups, resources.

**September 7, 2020** OCAHU Board Meeting

**September 1 – September 3, 2020 Virtual Sr. Summit Event. 7<sup>th</sup> year.** Hosted over 300 Medicare Agents with a full educational agenda, all 3 days.

**September 14 – September 18, 2020: Virtual CE Week.** A total of 5 CE's with over 100 agents attending.

**October 13, 2020** OCAHU Board Meeting

**October 13, 2020 OCAHU Webinar: Special Legislative Session Update with OC Senator Patricia Bates** Virtual call with membership able to ask questions of the Senator.

**November 10, 2020** OCAHU Board Meeting

**November 10, 2020 CE on Major League Mindset: Standing Up and Standing Out in Insurance** Explores ways to stand out in the crowd. Craft messages and marketing strategies.

**November 27, 2020 CAHU Foundation Charity Walkathon**

**December 4, 2020 Pasta Drive Thru Fundraiser for Caterina's Club** Members drove thru dropping off over 1,100 pounds of pasta for homeless kids.

**January 12, 2020** OCAHU Board Meeting

**January 13, 2020 CE on ACA IRS Reporting: Don't Fear the Forms**

**February 9, 2020** OCAHU Board Meeting

**February 11 - 12, 2020 Annual Sales Symposium** First ever virtual 2 day event

**March 16, 2020** OCAHU Broad Meeting

**March 16, 2020 CE on Overcoming Adversity and Life's (Perceived) Obstacles**

**April 13, 2020** OCAHU Board Meeting

**April 19, 2020 Swing for a Cure Charity Golf Tournament** 100 golfers (Covid restrictions) supporting Cystic Fibrosis.

### **ADDITIONAL COMMENTS**

COVID 19 did not discriminate against OCAHU. OCAHU continues to be an active chapter that takes pride in its membership, meetings and support of local charities even during the pandemic. 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 at least 5 or more and not lose many. Paul Roberts, VP of Professional Development has done just an Outstanding job in organizing CE's, Courses for our membership, especially during the pandemic. Brent Buettner has done a great job keeping us in the Social Media limelight. Jennifer Holmberg, stepped right into Dorothy's shoes taking over the COIN.