

## ANNUAL SUMMARY REPORT OF ACTIVITIES AND ACCOMPLISHMENTS

### April 2018 to March 2019

**April 2018:** OCAHU held its 21st Annual Swing "Fore" the Cure Golf Tournament benefiting Cystic Fibrosis Foundation of Orange County. OCAHU provided a donation of \$23,473 (a new record!) to Cystic Fibrosis. Over 140 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.

**May 2018:** 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 201-2018 term with Ryan Dorigan elected as our President for the coming year.

**Our 2018 - 2019** 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.

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.

**June 2018: OCAHU** held its 16th 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 \$46,215 (another new record!) to benefit New Hope Grief Support Community. Once again, all monies received above our costs was donated to the charity.

We completed a Leadership training and Strategic planning meeting on June 8th for new Chapter year and recognized our departing Board Members for their service.

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

- The Willian Flood Public Service Award for the seventh consecutive yer
- The Pacesetter Award for the fifth consecutive year
- The Presidential Citation Award was presented to Juan Lopez
- The Robert Osler Award for Professional Development
- We had the Highest Growth Rate with 23.73%

**July 2018:** OCAHU hosted several in district meetings with our local legislators. A group of OCAHU board members including Maggie Stedt and Dan Abrams went to meet with Sen. Pat Bates. OCAHU member Meg McComb and OCAHU President

Ryan Dorigan attended a fundraiser for the campaign for Young Kim that was also attended by US Representatives Mimi Walters, Dana Rohrabacher, and Ed Royce.

**August 2018:** OCAHU partnered with IEAHU and SDAHU to conduct our Annual Medicare Summit at Pechanga Casino on August 22nd-23rd. There were over 80 carriers and vendors in attendance and over 850 attendees. For the second year in a row, the event ran two days with certification, CE classes, breakout sessions, guest speakers and more.

OCAHU also hosted a PAC Fundraiser at Angel Stadium. We had a barbeque tailgate party in the in the parking lot before the game and had over 65 attendees.

**September 2018:** Held our Annual CE Day on September 11th. We had over 100 attendees and offered 7 CE credit units.

We had 6 OCAHU members who attended the CAHU GALA on September 14th. We enjoyed a fun evening of drinks, dancing, and fundraising for a critical cause.

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

- Large Chapter of the Year
- Outstanding Local Chapter Newsletter
- Outstanding Local Chapter Membership Growth

Two of our members were recognized as well:

- Pat Stiffer- Member of the Year
- Maggie Stedt – The Robert K Shelppler Award- Outstanding Membership Recruiter

**October 2018:** We hosted our monthly board meeting at Hyatt Regency. We had a special member meeting on “how to Survive the 4th Quarter”. In a Round Table Discussion Featured Speakers Include: Warner Pacific, Word & Brown, AGA, Colonial Life, Oscar, Kaiser Permanente and More!

**November 2018:** OCAHU was recognized as an honoree at the National Philanthropy Day program at the Grove in Anaheim.

**December 2018:** Our annual holiday celebration was held at JT Schmidt’s on December 10th. We once again held our annual toy drive with toys donated to the Children’s Hospital of Orange County.

**January 2019:** We hosted our consumer education day. Marilyn Monohan was there to present from Monahan Law Office and she updated us on the changes for 2019 for employee benefit specialists.

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

**February 2019:** We held our Annual Business Development Summit with over 300 attendees. "Surviving the Perfect Storm". We honored Maggie Stedt as our OCAHU 2019 Pinnacle Award Winner in recognition of her service to OCAHU and to our industry. We gained over 35 new members. Rusty Rice the NAHU president led off the day's events.

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 Ethics Course Joe Navarro from Warner Pacific hosted our ethics course. We also hosted a sponsor breakfast before the meeting, and we took time to review the NAHU website.

We also hosted a special PAC sports view party at JT Schmidt's featuring a Ducks hockey game and a Lakers basketball game. We had a raffle and a silent auction, and we raised nearly \$3,000 for PAC.

A Member Survey was completed in March which 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
- Gold: Beam Dental and Word & Brown
- Silver: BenefitMall and Oscar
- Bronze: Sterling Administration.

**Additional Comments:**

Our award-winning COIN magazine continues to provide interesting and insightful articles. Our Committees for the Golf Tournament, Celebration of Women in Business and the Senior Summit are hard at work for the upcoming events.

We added 70 new members through March but continue to be challenged by our lapsed members. Our chapter has been impacted by members leaving the business and layoffs by carriers and GA's.

Maggie Stedt VP of Professional Development hit it out of the park with the total number of CE class offerings this year at many events!

Our social media presence is increasing more connectivity with our Facebook page and our LinkedIn 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!