

NABIP UT Strategic Plan 2024-2025

Presidents Goals:

Create and Atmosphere of Camradererie
Greeter at each event
Member Appreciation Event
Carrier Day
Two new events beyond Sales Congress and DOH

Quarter 3			Quarter 4			Quarter 1			Quarter 2		
Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Yes	yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes			
Yes	No	No	No	no	no	no	no	no			
No	No	No	No	No	No	No	No	No			
Pool Party	no	no	Charity	no	yes - call with JBW	Townhall	No	Elevate Utah			

Presidents Chairs

PAC
All Leadership Board Members Donate \$10/month
Increase Donations monthly local pac to \$1000
Roll Pac over to Venmo option
Update CC for all members to new Quick Books

July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June
No	No	No	No	No	No	No	no				
\$819	\$787	\$1,027	\$2	\$777	\$872	\$832	\$822	\$832			
6								yes 5ish			

Blake Izatt (need CCV), Lloyd Coleman, Chris Kluge

Legislation

Meet with Speaker of House
Meet with President of Senate
Meet with bill sponsor on accumulator
Publish one opinion piece with local media

July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June
Yes 6.18	-	-	-	-	-	yes					
not yet	-	-	-	-	-	yes					
n/a	-	-	-	-	-	yes					
-	-	-	-	-	-	no					

*think tank to start soon - open to all members
In place of monthly leg update
Zoom primarily, however some in person
Similar format to HB 023 call with Dunningan
Committee to participate, however open to full membership
Create "Voice of association" - first in May virtual set tone & live event in person in august
Budget set aside 2-5k for attorney who can craft legislation to make a bigger impact at capitol and make our issues seen

Past President Chair

FUTURE LEADERS NETWORK
4 events (one quarterly)
25 people in attendance at each
One happy hour
\$10,000 in sponsorships

July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June
6.25		9.25			9.18.25			3.27			
Yes		yes			Call with JBW						
7.12		-									
2500								email blast 3.19.25			

Secretary's Chairs

Media Relations
Cultivate relationship with media outlet
Continue to post to all social media channels

July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June
-	-	-	-	-	-	-	-	-	-	-	-
Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes				

*Need help here

Membership & Retention

250 Members (4 per month)
Spotlight new members each month
"fun" event for new members (freshman orientation?)

July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June
9	0	1	7	2	0	0	2	10			
Yes	-	yes	y	y	-	-	y	y			
-	-	-	-	-	-	-	-	-			

*lunch for new members -monthly - calendar it out from there

Treasurers Chairs

Professional Development

Monthly Virtual CE
Best Practices Day/Trade Show
Promote REBC on Social Media quarterly
LPRT For all Board Members

July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June
yes	Medicare 2 Hour	Dave Mordo/RX	AI / Erick	Charity	CEO/Jes sica	Day on the Hill	-	Elevate Utah = 4 CE	Ethics	Golf Tourny	Employee Financial
Work on	-	-	-	-	-	-	-	-			
Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
3	3	3	3	3	3	3	3	3			

maybe lower priority for 2025-2026
Leg is bigger focus - look at this in a future year

Public Service

Christmas Box House - Nov. Increase participation to 45 members
Kid related Spring event - 45 members

July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June
Yes	no	no	no	yes	no	no	no	no			
-	-	-	-	6	-	-	-	-			

Find better messaging - maybe look for a different location? Tie it into a membership appreciation event - donation and happy hour or somethi

Level Funding

Teach new producers
1-2 Events/Classes specific to Level Funding

July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June
			yes					yes			
			yes					yes			

GOVERNANCE

Review Vision Statement
Update ByLaws
Create P&P's

Parking Lot

Virtual Chapter
Increase Attendance at CAP Conference
Increase Attendance at NABIP UT Day at the Capitol
Generate CE Presenters Database

no
yes

NABIP UT Strategic Plan 2024-2025

Convert PAC Donations to Digital

coming

Landmark Award
Website Award
Platinum Certification