



2022-23 BUDGET PLANNING SESSION
June 24, 2022
Agenda

Call to order: 12:47pm

1. Bryson/Joan/Jon 20 minutes
 - a. Gaining Exchange members into MAHU
 - *What kind of formal relationship can we form with producers who are not likely to become full members of MAHU? Possible junior membership at lower cost? Checking in on compliance for this sub membership from national.*
 - *John going to connector entities- Formed with ACA can sell people into the exchange. How can we draw a line between this and licensed agents, while still being able to join for membership as an Entity?*
 - *2 hour CE to increase participation. Promote to all subchapters. Joan and Bryson taking lead on this. Can put together legislative update and present on the road to different locations throughout MD. Marketing to non-members. Still more to come here.*
 - b. Evening in Annapolis
 - *Having again, possibly in office. \$1,500 of support from MAHU for this event. Total cost \$5k. Remain insurance focused.*
 - c. PAC funding and operations
 - *Had an event 6/22-23. MAHU had not participated Jon Frank attended on our behalf and prepared legislator for what she's going to be considering for next year. Pam Bidle if re elected would set us up in a great position.*
 - *Next recommended contribution to new chair of house health and gov operations committee. Can be tough but Bryson has a great relationship. July 28th fundraising event. Strongly advise to participate in event and donate to establish further relationship. \$1,500 donation from MAHU? Couldn't spell name.*
 - *Recommended to budget and raise HUPAC contributions to 2x to \$10k. Separate discussion on how to do this? Aaron Aist pac chair. Sean Ruder Pac treasurer. Steve Solomon for support? Alan Shulman?*
 - d. Other open items
 - *2022 sponsorship- Old Aetna contact Bryson worked with moved to UHC and wants to meet with MAHU brokers. Very interested in promoting their exchange business. Medicare event could be supported by them. More to come and anxious to partner. Put together a separate package for this and Bryson will make introductions. This could also be with PBMs. Exclusivity for these sponsors?*
2. NAHU Name change vs Star Chapter update
 - a. Timeline – we will have to update Star Chapter before name change takes effect.

Hoping NAHU gives subsidy towards activities required for name change TBD

b. Next steps – Jaffe to work with StarChapter on migration

3. Programming

a. Pick dates for next 12 months – how many “meetings”, hybrid rotating through in-person locations (BAHU, ESAHU, GWAHU), member “appreciation” happy hours?

b. Philanthropy – proactive planning w/GCCF?

c. “New” revenue generating opp – Medicare Summit – Aug 2023

- *Mid September or Early August?*

4. Budget & Sponsorship – Nancy reviewed

a. Review current financials

b. Discuss new expenses

c. Review “need” for sponsorship income to cover fixed costs after mbrship income

d. Discuss 2022 sponsorship package – Michael