

2016 MEMBER'S NEEDS SURVEY RESULTS

57 Responses Received

1. Do you like the current schedule of meetings in August, September, December, January, February, March, April or May and June – with no meetings in July, October and November?

Yes – 56

No – 1

Comments:

It's fine.

Should have meetings in October and November

I feel it is too clunky. I liked September through May/June schedule.

December will be difficult.

2. What's your preference for meetings times?

a. Offer some mornings and some lunch – 26

b. Offer all mornings – 20

c. Offer all lunch – 11

Comments:

Scheduling.

Mixed schedule helps with planning client meetings.

Middle of the day is hard for me to get away for 2 hours including commute time.

I simply cannot make mornings, in the past I had children that caused issues with school and getting back to a meeting.

It is easier to schedule the rest of our workday after a breakfast meeting, versus starting our workday, stopping for a meeting, then going back to work.

It is very difficult to interrupt the work day to attend the meeting. I prefer all meetings before business hours.

So the rest of the day is free to take care of business. Difficult to stop in the middle.

Lunch meetings work better for me because I typically work emails in the morning before my meetings. But I am okay with the mix.

Appointments can run over and cause the lunch meetings to be missed.

Mornings are generally busy with meetings already.

I prefer meetings at the start or end of the day. Less disruption to work and projects that I am working on.

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Proximity to venue – 100 miles away.

It is difficult to get away from the office mid-day.

See what the turnout is – I time will not tell you.

It's too difficult to commit to lunch when schedules can be disrupted so easily. Breakfasts are also less expensive (usually).

3. What day of the week is best for you to attend TVAHU meetings?

- a. **Monday – 4**
- b. **Tuesday – 18**
- c. **Wednesday – 15**
- d. **Thursday – 43**
- e. **Friday – 7**

4. What topics would you like to learn more about at future meetings?

- a. **Medicare – 25**
- b. **Individual/Exchange – 27**
- c. **Group – 46**
- d. **Wellness – 23**
- e. **Other – 0**

Comments:

Electronic efficiencies, account management.

Reform.

ACA

How to consult and add value to your customers.

Compliance around ACA, more information on Providers and Health Systems and what they are doing to manage care and control costs.

Some new topic and not so many on the financial side of things. Most of the meetings were not of interest to me last year.

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More complex subjects. Want to expand my education and just get my CE's.

All.

Advanced ACA and more advanced topics.

Self Funded.

5. Do you have any suggestions for meeting speakers? Do you have any relationships with potential speakers that could provide education and information on important topics related to our industry?

Yes – 8

No – 49

Comments:

Dr. Edward McEachern

I have a few ERISA attorneys who are not competitors.

Someone around customer service and relationships.

Scott Kreilling, Plan President Regence Blue Shield of Idaho.

Dr. Edward McEachern – PacificSource.

Dennis Johnson, CEO at United Heritage Insurance (my dad): Employer groups/how changes in the industry are affecting their business and choices for benefits.

I have contacts at the DOI, YHI, DHW and other people I am in meetings with several times a month.

6. Would you be interested in attending meetings that are non-CE, but are more professional development?

Yes – 42

No – 15

7. What can we do as a Chapter to encourage membership growth?

No idea, we have tried for years.

Call agents, encourage members to invite colleagues.

Bring in Dept. of Insurance and Ethics.

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Emphasize the value of the association. For new agents it is a great mentoring experience.

Advertise to brokers as a flier or letter.

Don't hold meetings at 7:30 a.m.

Contests, carrier endorsement.

Support meaningful continued education and professional development programs.

Stand up against the carriers as an organization. We need to band together to tell the carriers that we need properly compensated for our work. We have continued to go backwards. YHI earns 1.99% do the math on a 55 year old, they earn more for a software program than the professionals advising and taking all the risk.

Speakers and topics should be diverse and help with all lines of business.

Engage the membership more. This survey is a good way to find out what people really want.

I think we just need more people spreading the word and talking to other brokers about the benefits of being a member. I think utilizing the carrier reps would help greatly, because we meet with these brokers daily, we could easily ask about a membership and explain the benefits.

Review lists of membership with current active members from each brokerage firm. Who are we missing?

I feel the increase to \$17 for breakfast is not appropriate and I am not comfortable using PayPal to pay in advance which is required.

Good information provided in meetings. Get more brokers involved in positions on the board or committees.

A lot of people don't join because they said they don't get anything for their money. I have been trying to get people in my office for years and they feel it is not worth the money.

Tough question. Each person has their own reason to join or be active. I think we do a good job getting the active members that want to join. It is the ones that quite frankly do not get it that do not join or let it lapse.

Combine with NAIFA.

Company sponsorship.

We're doing fine.

Work with our carrier sponsors, they contact more agents and all the new agents. I seldom run into other agents in the field.

Publish the topics and speakers further in advance so that members and non-members could plan.

There needs to be a stronger connection to the value of membership. Today it's primarily two things – CE credit and funding the PAC. It also feels like the carriers are asked to assume the financial burden on behalf of the producers.

Need to reach out to large agencies and get them to participate. Need to make sure focus is equal between group and individual. Advanced topics are a must.

Advertise the benefits. Get a list of all agents in our area that are not members and send them an invitation to join.

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8. Are you:

- a. Producer – 27**
- b. Carrier – 23**
- c. Medicare – 0**
- d. Other – 7**

Soon to be retired agent/manager

Account Manager (3)

Vendor

Benefits Manager

Managing General Agency

9. Is your focus:

- a. Individual – 4**
- b. Group – 32**
- c. Medicare – 10**
- d. Other – 11**

All of the above (4)

Self Funding group/pool

Both Group and Individual

I do all three with focus on Medicare if I had to choose.

10. If one of your colleagues were to ask you why you participate in TVAHU, what would tell them?

- a. Networking – 38**
- b. Political Action – 26**
- c. Community Involvement – 29**
- d. Continuing Education – 29**

Comments:

Honestly, I haven't attending a meeting in over a year.

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Current information on national insurance issues!

Support my industry and my profession.

Builds my overall depth of knowledge. Allows me to interact with my peers to get to know them.

Knowledge.

Served five years straight under Life Underwriters years ago.

Your real estate agent, doctor, banker, even builder is a member of their association you should be too.