



Year in Review:  
Annual Report  
**July 2015 – June 2016**

# Year in Review: Annual Report, 2016



Under the presidency of Marcy McCulloch, and the board of directors listed below, which was sworn in by CAHU President, Michael Lujan on July 8, 2015, the Sacramento Association of Health Underwriters ("SAHU"), which is a local chapter of our state association (CAHU), and national headquarters in Washington, DC, (NAHU), was an active and award winning chapter.

President *	Marcy McCulloch	Rogers Benefit Group
President Elect *	Ned Schaut	Eureka Insurance Solutions
Past President *	Cerrina Jensen	CoreMark Insurance Services
Secretary *	Samantha Siders	California Choice
Treasurer *	Brad Davis	Wraith, Scarlett & Randolph
PAC	Carolyn Lewis	Lewis Benefits Group
Legislation	David Brabender	Atman Insurance Services
Membership Retention	Lisa Hutcherson	Aflac
Membership (New)	Lauren Bayha	Western Health Advantage
Programs	Sam Rumbaugh	Aflac
Professional Dev.	Alexis DeVorss	WestCorp Financial Services
Community Service	Liz Mack	Kaiser Permanente
Media & PR	Jennifer Mason	Shepler Fear General Agency
Communications	Teri Blake	Word & Brown
Awards & Recognition	Helen Ornellas	Ornellas & Associates
Executive Director	Jeannie Bruins	

*\* Executive Committee*

SAHU's leadership continues to focus on succession planning, committee format, accountability and transparency. These objectives are all driven by one common purpose – to be a valuable resource and place of camaraderie for our members. The ever-improving results this has generated for SAHU the last several years reinforces our efforts and commitment to growing and engaging our membership base.

We look forward to another record-breaking year under new President Ned Schaut and his team, and will report back again this time in 2017.

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## **NAHU AWARDS**

- Pacesetter Award (chapter award)
- Presidential Citation – Marcy McCulloch



## **NAHU DISTINCTIONS**

- Earned NAHU Gold Certification
- Six Leading Producer Round Table Qualifiers (LPRT):
  1. Sam Cole - Lifetime Soaring Eagle
  2. David Fear, Jr. – Leading Producer
  3. Cerrina Jensen – Golden Eagle
  4. Marcy McCulloch – Eagle-Carrier Rep
  5. Ned Schaut – Eagle
  6. Shannon Zajec – Soaring Eagle
- Three Triple Crown Qualifiers, 2015
  1. Shannon Zajec
  2. David Fear, Jr.
  3. Cerrina Jensen



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## SPECIAL EVENTS

- Sent 5 members to NAHU Annual Convention in Albuquerque, NM in June 2016.
- Sent 2 members to CAHU Health Summit in Universal City, in October, 2015, where several additional members were in attendance.
- Sent 3 new board members to NAHU Region 8 Leadership Training in Las Vegas in August 2015.
- Annual Crab Feed with best attendance to date, February, 2016.
- Annual Golf Tournament at The Ridge, May 2016.
- Annual Awards Mixer, August, 2015.
- Annual Business Development Expo, June 2016
- Hosted two all day local Leadership Training sessions for 2015-16 board of directors.

## MEDIA & PUBLIC RELATIONS

- Another dynamic media campaign with several hits in print (including interviews and quotes.)
- Our followers on social media continue to expand, including Facebook, LinkedIn, and Twitter.



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## **LEGISLATIVE AFFAIRS**

- NAHU Capitol Conference in Washington, DC (Feb, 2016)
  - 11 SAHU Members attended
  - 7 Legislator Meetings
- CAHU Capitol Summit in Sacramento (May, 2016)
  - 9 Member Meeting Team
  - 13 Legislator Meetings



## **POLITICAL ACTION**

- In addition to individual member donations throughout the year, SAHU donated both to HUPAC (national) and CAHU PAC (state) in the amounts of \$4,720 and \$5,000.

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## **COMMUNITY SERVICE**

- Raised funds and awareness for River Oaks Center for Children, OKIZU, Sacramento Food Bank & Family Services, Deborah Murdock Memorial Fund and WEAVE.

## **PROGRAMMING AND PROFESSIONAL DEVELOPMENT**

- Annual Awards Mixer in August 2015.
- Annual Crab Feed in February 2016.
- Ethics CE presentation including 3 credit hours in March 2016.
- Annual Golf Tournament in May 2016.
- First Annual Business Development Expo in June 2016.
- Monthly breakfast/lunch meetings with a variety of guest speakers.



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## ADDITIONAL MOMENTS FROM THE PAST YEAR



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## **ADMINISTRATIVE ACHIEVEMENTS**

- Annual Member Needs Survey in March, 2016 with more than 25% response rate.
- Redesigned SAHU Website with pertinent information for our members. Published Weekly Bulletins and a midweek Special Events Alert, along with as needed unscheduled notifications.
- Annual Partnership Program Growth. In 2016, SAHU recruited more partners than any other year in history!
- Approved and implemented an updated Mission & Vision Statement:

### **Vision Statement:**

Every American **will have access** to personalized solutions for health, financial and retirement security using the services of **local insurance professionals.**

### **Mission Statement:**

SAHU will **improve its members ability** to meet the health, financial and retirement security needs of all Americans through **education, advocacy and professional development.**

**Sadly, we also lost a beloved member this year whom will be missed dearly by her SAHU Family.  
Rest in Peace, Deborah Murdock.**

## CONTACT US

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