



SACRAMENTO ASSOCIATION OF HEALTH UNDERWRITERS  
**SAHU Board of Directors Mid- Year Re-Treat and Board Meeting  
Year in Review and Planning for Next 6 Months**

1-14-2021

10:00AM to 11:30AM

Zoom Video Meeting

**Agenda**

**Call to Order – Sam Siders: 10:05AM**

- **Sam Siders – SAHU President**
  - Update
  - Sam's- SAHU – Power Point – See Attached
- **President-Elect – Carmen Perea**
  - Board Update – Committee –January 2021 – This is still in the works and there will be confirmation of the 2021-2022 SAHU Board in March 2021.
- **Executive Director – Helen Ornellas**
  - SAHU Sponsorship Matrix Review – Goal \$35,000 at \$27,600- Need \$7,400
- Crab Feed – Update – Helen Ornellas – Crab Feed is moving along, food and location have been determined, flyers done, donation letter completed, web site working for the event.
- **Professional Development**
  - SAHU Business Expo – Moved to July 29<sup>th</sup>, 2021
  - Committee Meetings – Once a month 2021- Starting in Feb or March.
  - **Committee:** Bryan Coppin, Michael Saab, Rosamaria Marrujo, Sam Siders, Carmen Perea, Conner Deck, and Helen Ornellas
- **Programs**
  - **Update**
    - Speakers scheduled for Jan, Feb and March 2021.
    - Speakers April – June Pending
- **Media**
  - Web- Site – Review- Completed – Everyone happy.
  - Items for News Ops.- Requested
  - Membership and SS Media Proposal – Rosamaria will review at meeting.
    - Pending – Re- quote to add more services for ongoing SS Media support.
- **Membership**
  - New members – Review at SAHU Board Meeting
  - Featured New Members.- Pending

SAHU – Sacramento Association of Health Underwriters – [www.sahu-ca.com](http://www.sahu-ca.com) – [info@sahu.com](mailto:info@sahu.com)

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- Video sent to Communications- Yes Posted
- **Membership Retention-**
  - Retention Report – Review at SAHU Board Meeting – Not Reviewed- Not at Meeting
- **Vanguard Council – VACANT**
- **Carrier Relations – VACANT**
- **Communications – Update-**
  - **SS Media – New LinkedIn and Twitter Account- Needs to be taken over. – New accounts set up for Facebook, LinkedIn , old account active for twitter.**
  - **E-Blast. – On Track**
  - **Newsletters**
  - **Events Marketing**
    - Speaker Lunch 1-20-2021
    - Save the Date Crab Feed – March 5<sup>th</sup>
    - **Need a new SAHU Membership Interview**
- **Awards – Update – None**

**Adjourn- 11:02AM**



### Call to Order : 11:15AM

- **SAHU Board Meeting: Call to Order Record attendance – NO Corium- Sam Siders, Helen Ornellas, Carmen Perea, Connie Correia , Lissette Rosenberg, Michael Saab.**
- **Not at SAHU Board Meeting: Josh Keller, Celeste Covey, Conner Deck, Bryan Coppin, Rosamaria Marrujo, Brian Christy, Michele Meder.**
  
- **Approve Minutes from Nov. & Dec. 2020- No Corium**
  
- **Treasurer – Carmen Perea**
  - Review P&L- 12-2020
    - January Medicare Check posted \$4,400
    - Sponsorship Pending - \$14,750
    - Total Due to post in January \$19,150
  - Balance Sheet – 11-2020 & 12-2020
  - Accept – Nov. & Dec.

### Review Calendar – Sam Siders

- **Past Events within last 30 Days**
  - SAHU Speaker Event – Scott Diehl
  - 12-16-2020 BYO Chili- Draw with Stacey Ball
  - River Oaks- Toy Drive Delivery 12-2020 – No In Person Event- COVID 19
  
- **Future Events within next 60 days**
  - Speaker Event – Perry Braun 1-20-2021
  - Speaker Event – Carolyn McNairy – 2-17-2021
  - Speaker Event - Scott E. Galbreath, J.D., LL.M 3-17-2021

### Old Business

- **Aug. CAHU – Medicare SAHU Check- Received \$4,400, will post in January P&L.**

### New Business

- **Washington DC – Capital Event 2-2021**
- **Business Expo- July 29<sup>th</sup>, 2021**
- **Golf Date – May 21,2021**
- **Membership and SS Media Proposal – Rosamaria will review at meeting.**

Adjourn 11:14AM- Helen Ornellas

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