



CAHIP Year in Review

January 2024 – March 2025

Advocating for Professionals. Unifying Our Voice. Leading with Purpose.

Executive Summary

Over the past 15 months, the California Association of Health Insurance Professionals (CAHIP) has remained laser-focused on our mission: to protect consumers' access to healthcare and elevate the licensed insurance professional. With over 255,000 health and life insurance professionals across the state, CAHIP provides advocacy, education, leadership development, and support in an increasingly complex landscape.

CAHIP California prioritized unity among chapters, strengthened grassroots advocacy, launched diversity and inclusion initiatives, delivered substantial resources to support our members' success, introduced new tech to streamline and automate workflows processes, and enhanced our coalition efforts with other associations aligned with our mission. We remain committed to ensuring access to quality coverage is a right—not a privilege—for every Californian.

Mission in Motion

"Our goal is to protect consumers' access to healthcare. That includes access to doctors and hospitals, choices of plans that meet individual needs, and comprehensive benefits that help to ensure a long, healthy, and happy life."

CAHIP brokers are trusted advisors who meet regularly with policymakers, provide real-time insights to clients, and fight to preserve affordable, accessible, quality healthcare.

Leadership Development: Building Organizational Strength

Succession Planning

Recognizing the importance of sustainable leadership, CAHIP launched the **Leadership Farm Team** to assist local chapters in identifying and mentoring future leaders. This initiative aimed to ensure continuity and the ongoing vitality of the organization at both state and local levels.

Past Presidents Council

To leverage the experience of former leaders, CAHIP established the **Past Presidents Council**, convening bi-annual meetings to provide strategic guidance, mentorship, and support for current leadership teams.

Legislative Advocacy

- CAHIP's Legislative Council thoroughly reviewed the findings and engaged with policymakers to ensure that the perspectives and interests of health insurance professionals were considered in discussions surrounding long-term care solutions in California.

- Advocated for clarity and fairness in the long-term care insurance landscape via AB 567 engagement.
- March 2025 Bill Review Day evaluated 2,100+ bills with CAHIP's Legislative Council, defining our official positions.
- Capitol Summit 2024 brought members to Sacramento for direct legislative advocacy. Capitol Summit 2025 is underway.
- Developed policy briefs and talking points to guide grassroots member engagement.
- Supported PAC efforts to strengthen the industry's influence in Sacramento and Washington D.C.

Professional Development & Education

- Delivered 40+ hours of CE content across Medicare, compliance, behavioral health, DEIB, and employer group coverage.
- Shared CE toolkits and templates for chapter use, improving consistency and access across the state.
- Had our Second Annual Innovation Expo in Long Beach, CA. Another great event that for the first time showcased leadership on the same stage from NABIP, NAIFA, HAFA and WIFS.

Events & Member Engagement

- Hosted statewide initiatives including the 2025 Capitol Summit and Innovation Expo.
- Our local chapters once again organized public-facing events such as 'Fund a Need - Crab Feeds', 'Take a Swing Fore the Cure' and the 'Second Annual Dance Showdown'.
- Strengthened chapter participation through calendar-wide coordination and visibility on CAHIP.com.
- Launched CAHIP's DEIB Symposium: 'Inclusive Solutions, Broader Access, and Greater Trust' (April 2025).

Communications & Public Affairs

- Published monthly 'CAHIP Connection' newsletters, providing timely legislative alerts and educational updates.
- Developed communication toolkits and position statements to elevate public trust in brokers. Templates created for local chapter leadership to assist with running their chapters'

communication.

- Promoted CAHIP brokers as essential professionals ensuring client access and consumer protections.

DEIB: Diversity, Equity, Inclusion & Belonging

- Planned and promoted the statewide DEIB Symposium for April 2025.
- Collaborated with chapter DEIB liaisons and promoted culturally competent practices in CE and member programming.
- Framed DEIB not only as a value, but as a business strategy that improves broker impact.

Membership Growth & Support

- March Madness 2025 Call-a-Thon activated hundreds of members across chapters to recruit and renew.
- Enhanced onboarding, mentorship, and chapter networking resources. New technology implemented to automate communication for engaging with new, active and lapsed members.
- Reinforced that membership is an investment in advocacy, professional relevance, and client service.

Disaster Relief & Member Support

- CAHIP Cares outreach supported members impacted by wildfires in LA County.
- Shared NABIP's Disaster Resource Guide and coordinated gift card distribution.
- Demonstrated that CAHIP stands beside its members during professional and personal challenges.

Looking Forward

- Broaden access to policy engagement tools for all members.
- Continue refining chapter succession planning and leadership pipelines.
- Advance DEIB integration across all pillars of CAHIP's work.
- Strengthen partnerships with regulators, legislators, and community leaders to elevate the broker voice.

Thank You

We thank every CAHIP member, chapter leader, sponsor, and volunteer who made this year impactful.

Together, we have built something resilient, responsive, and future-focused.

#WeAreCAHIP | #TheBrokerVoice | #AdvocateEducateLead