

POLICY NUMBER: 3019

POLICY TITLE: Guidelines to standardize Chapter Meetings and Events

CLASSIFICATION: Board of Directors

DATE(S) AMENDED/APPROVED: June 17, 2025

NEXT REVIEW DATE: 2028

PURPOSE:

To support a consistent and valuable membership experience across all chapters.

POLICY:

CAHIP leadership will establish best practice guides for:

- Board meetings
- Chapter Member Meetings
- Webinars/zoom meetings
- Charity events
- Miscellaneous association hosted events

PROCEDURE(S):

Best practices guides may include:

- National updates
- Statewide updates
- Legislative/regulatory/advocacy updates
- Agenda items, recognition of special guests, etc.
- Upcoming events
- Membership/PAC updates
- See appendix A for additional detail.

FINANCIAL IMPACT:

None.

APPENDIX A

Sample Board Meetings Agenda

Date, Time (any pertinent links, zoom, etc)

The meeting of the Board was called to order at:

Attendees:

Excused:

Approval of XXX Minutes – Motioned by: 2nd by:

Approval of XXX Agenda – Motioned by: 2nd by:

Executive Board Reports

NABIP – Current Federal legislative update, Meetings available to attend, Leadership and professional development opportunities

CAHIP - Current State legislative update, Meetings available to attend, Leadership and professional development opportunities

Chapter Updates

Finance Report

VP & Committee Chair Reports

- Legislation, Membership, Communications, PD, PAC, Awards, Etc

Old Business

New Business

Adjourn Meeting was closed at:

Note: Next board meeting will take place XXXXXXXX IN PERSON and/or Hybrid insert location info here



California Agents and Health Insurance Professionals

CAHIP

POLICY & PROCEDURES

Sample Member Meetings Agenda – Including VIRTUAL

Open/Welcome

Optional: Pledge of Allegiance, National Anthem, Invocation

Recognize sponsors and exhibitors

Acknowledge any National, Regional or State/Local Leadership (Past and Present) in attendance

Ask room for volunteer leadership

One meeting per year recognizes membership longevity (1-25+)

Update with NABIP and CAHIP Activity Reports (including legislative)

Highlight upcoming NABIP/CAHIP/Local events and engagement opportunities (ie: NABIP or local committee application period, awards deadlines, Power Hour, Orientation, see state and national calendars for more detail.)

Membership Recruitment and Engagement

PAC Promotion

Program as planned

Additional committee guidelines to come.