

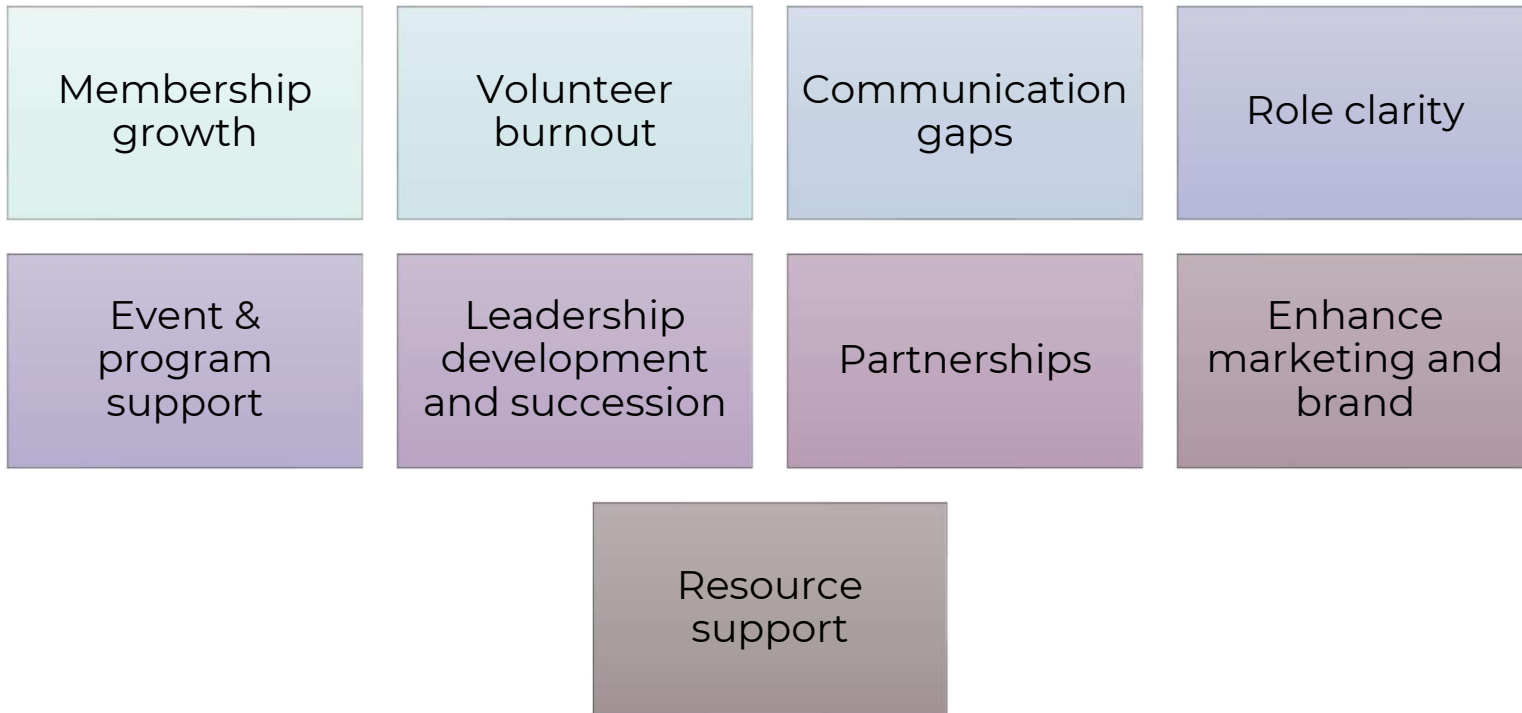
State Chapter Strategic Guardrails



1. Right sized for volunteers
2. Membership/retention focus
3. One team mindset
4. Build community
5. Unified leadership voice



Local Chapters Key Themes

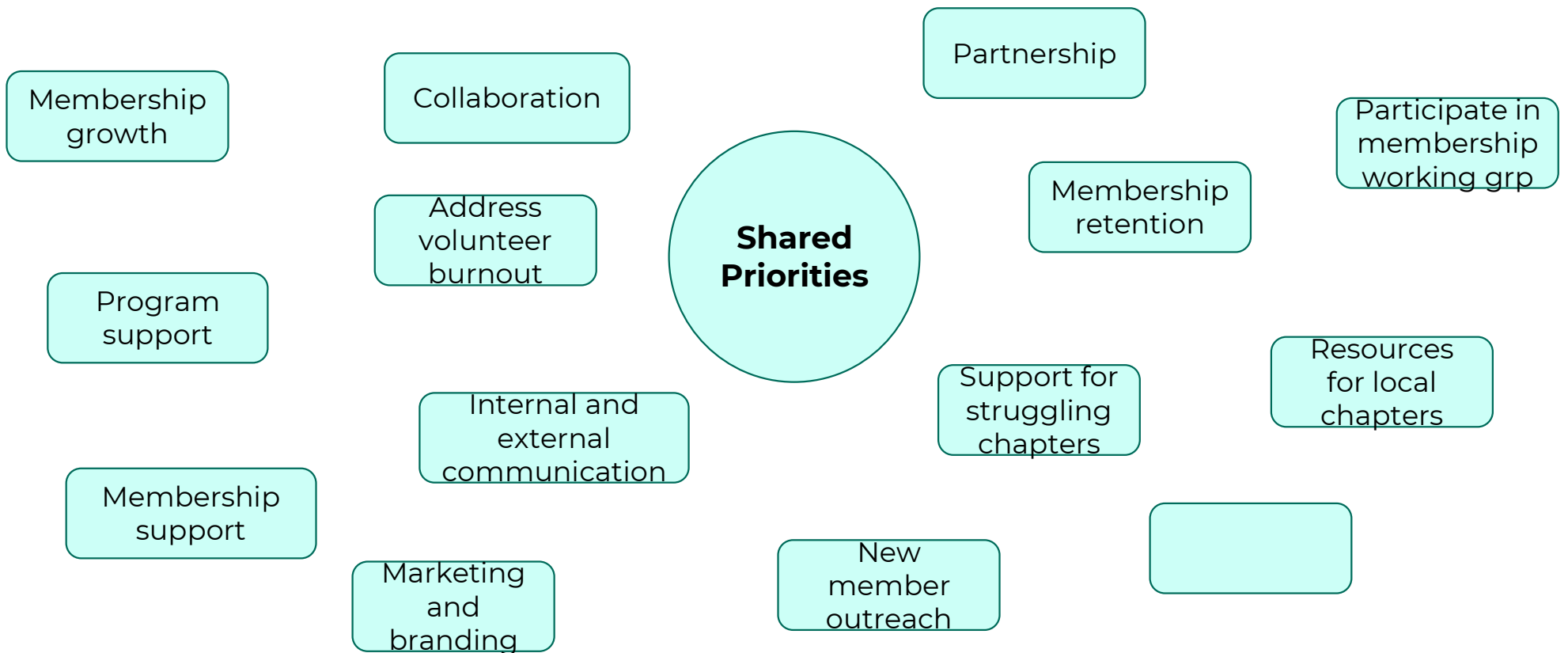


Key Theme/Filter Connections



Biggest Theme(s)	Where We Add Value as a State	Filters it Aligns With
Burnout	Adapting chapter culture to one of involvement	Right size & membership
Membership growth, leadership development, burnout	Provide event/program support	Right size
Membership growth, leadership development, burnout		Right size & membership
Membership growth	Systems to support local chapters and frameworks that can be emulated	Membership – align with one voice

Shared Priorities



Local Chapter Strategic Filters



Filter	What it Asks
Member Value	Will this directly benefit members in a meaningful way?
Mission Alignment	Does this support our core mission or purpose?
Impact	Will this create noticeable or measurable differences?
Feasibility	Can we realistically do this with the time, skills, and resources we have?
Scalability/Replicability	Could this work across multiple chapters or be reused in the future?
Collaboration Potential	Does this create opportunities for chapters to work together or learn from each other?
Growth	Will this result in an increase in member growth or retention?

2025-2026 CAHIP BOARD Goals

President – Dawn McFarland

Stabilize and diversify Partnerships for Fundraising,
Bridge the Gap between all segments (group, Medicare, IFP) to increase membership.
Create efficiencies and turnkey processes to alleviate volunteer burnout.

President Elect – Craig Gussin

Help Irma grow membership, to reach 2K in 2025
Grow the PAC
Teach all chapter how to work with the Media (TV, Radio, Newsprint)

Immediate Past President – Rosamaria Marrujo

Governance update bylaws to meet our mission. Work with the Executive Director to update all the outdated website content so its more collaborative for our members and chapters. Make the bylaws easier to access use all the time.

VP of Legislation – Janet Powelson

Document resources: Master spreadsheets for CapCon and CapSummit meeting scheduling with tab for each local chapter; Glossary of Terms; email templates.
Timeline for CAHIP VP Leg position.
Revive/Revamp the Adopt-a-Leg program

VP of Membership – Irma Romero

Membership growth currently 1240, grow by 25% +310 new members = 1550 Stretch Goal: 2,000 new members
Synchronized March Membership Campaign with 80% participation from local chapters in March 2026
Strategic Partnerships - establish 3 or more sources to generate new members

VP of PAC – Jordan Futch

Build the PAC fund back up to \$100K
Increase monthly donations
Increase the total number of donors

VP of Communications – Kristie Scavarda

Increase Engagement from Existing Followers on Linked In
Increase Facebook Followers to 1000
Increase video (reels) communication on state and local level

VP of Finance - Kerry Wright

To help us make sure we are getting our proper allotment of dues.
To help us efficiently stay on budget.

VP of Professional Development – Manny Alcaine

Innovation EXPO
Regional Fundraising and community awareness dinners
Local and State Collaboration for best exposure

VP Public Affairs – Vanessa Ignacio

work with Craig on creating a team who will do live news interviews
more content
Succession planning and preparation

VP of Corporate Relations – Elizabeth Underhill

Clearly be able to demonstrate the return on investment for sponsors/partners so they see the value in supporting our association; tweak sponsorship package to include an option that may be able to get more smaller agencies in to support the association; and increase sponsorship revenue overall by at least \$10k-\$20k from current

VP Community Outreach/Foundation – Pat Burns

Get foundation back in business for chapters,
start program for new emerging leaders in NABIP, and
Continue to build a website for California Consumers

VP Member Recognition/Awards – Pat Stifler

Leg Excellence award,
Landmark,
Presidential citation,
Media,
Website Awards

Medicare – Bran Billhartz and Greg Wolin

Grow membership. I think that we have an opportunity to add members for those who sell Medicare. I ask agents questions or make comments about NABIP and

they look at me like I am speaking a foreign language. It is not the name of NABIP that they need to understand it is the really what NABIP does in DC to protect our

livelihood that is at the tip of the spear for why NABIP, to me.



Lap 5

Lap 4

Lap 3



Lap 1

Lap 4

Lap 5

Lap 4



Lap 4

Lap 3



TEAM

The One-ders

Team Members:

- Patrick Switzer
- Kim Ball
- Ashley Wong
- Jordan Futch

TEAM

Fast & Furious
Fabulous

Team Members:

- Vanessa
- Cathy
- Ima

TEAM 2

BOO
B-O-O
Boo

Team Members:

- Pat Burns
- Rod Owen
- Janet Powelson



Lap 6



Lap 6



TEAM

We're # 1

Team Members:

- Brad Wright
- Tim Kanter
- Cherie Crotcher
- Rosamaria Marujo
- Dede Kennedy

TEAM

GTC
(Get the Cash)

Team Members:

- Dave
- Liz
- Craig
- Jack
- Keri

TEAM

quattro

Team Members:

- Sam
- Bruce
- Kerry



CA Race to Recruit *Let's GO!*

Team Name:
The One-ers

6 target areas to collaborate and grow CA membership!

LAP #	Name of Idea	How it Works	Success Signals	How can the state help?
#1 Outreach/ Engagement	Bring a guest	Get 1 year free if guest joins	Increased membership	Discuss
#2 Partnership Program	Special Deals	Carriers, Captives, other vendors give special deals exclusively to CAHIP agencies	??	Discuss
#3 Event/ Community Building				
#4 Leadership Succession				
#5 Onboarding				
#6 Retention	Lapse Outreach	Membership chair should reach out to lapsed members	Database of outreach w/ signals like "Lapse turnaround" or "Reason lapsed"	Help w/ infrastructure and database



CA Race to Recruit

Let's GO!



Team Name:

B-0-0

6 target areas to collaborate and grow CA membership!

LAP #	Name of Idea	How it Works	Success Signals	How can the state help?
#1 Outreach/ Engagement	- Mentoring / Subject spec Emerging Leadership	Following PA model	Retention of younger pop - - Larger brokerages use our program	
#2 Partnership Program	GA Carrier ads for NABIP in broker blasts.	Broker blasts include CAHIP ad		
#3 Event/ Community Building	Subject spec. (Medicare, Gp.)			
#4 Leadership Succession	Engagement on Committees			
#5 Onboarding	7 touch pts. fewer as necessary if BOD is small	NABIP model customize for local BOD size		
#6 Retention	Relationship/ partnership	Pair with a longer-term member		



CA Race to Recruit *Let's GO!*

Team Name:
ETC

6 target areas to collaborate and grow CA membership!

LAP #	Name of Idea	How it Works	Success Signals	How can the state help?
#1 Outreach/ Engagement	Text & Voice Drop	Automatic monthly texts/ voicemails/e-mails to members & sponsors to share relevant info. such as events, op. shout, etc. <i>and personal</i>	Increased attendance, participation, membership retention	Allocate \$ & identify program that can be used to do so
#2 Partnership Program	Junior college Partnership/ Working w/ GA's	Partnering w/ JC's to promote insurance as a career & provide a pathway through CAHIP	Hiring students (among our agency owner members) to get them started	Putting together program to implement statewide
#3 Event/ Community Building	Niche Group marketing	Market to communities we traditionally have not reached out to (such as Asian & Latino markets)	Increased membership & new hires from these communities.	Assist w/ marketing among local chapters to promote outreach
#4 Leadership Succession	All positions have a committee	Each local chapter has a committee for each board position.	Each position having a committee.	Find members not currently involved to sit on committees.
#5 Onboarding				
#6 Retention	Each chapter have retention chair	Board position to reach out on monthly basis & review past vs. current membership list	Growing membership/ getting those who lapse to rejoin	Education of membership values.



CA Race to Recruit *Let's GO!*

Team Name:
Quattro

6 target areas to collaborate and grow CA membership!

LAP #	Name of Idea	How it Works	Success Signals	How can the state help?
#1 Outreach/ Engagement	Advertise Commercials →	Commercials struggle: how to get in front of people.	recognition	QR code to advertise plan / send out on website + S.M.
#2 Partnership Program	Sister Associations + other regulatory groups.	strategic relationship building	Attend / invite each other to events.	centers of influence connect w/ state wide leaders.
#3 Event/ Community Building	more social events	- no cost - low cost sponsor ship - w/ networking	attendance involvement membership	talking point hand outs share venue idea
#4 Leadership Succession	get folks to state + national events	encourage involvement + expose to how we work + get them excited	succession	1st time stipends
#5 Onboarding	communication calls "orientation process"	*Emails, call, a preformatted orientation with calendar, next event	Member growth + retention	new member event set at state
#6 Retention				



CA Race to Recruit *Let's GO!*

Team Name:

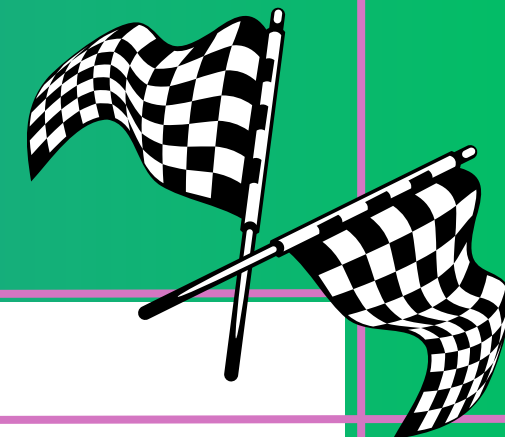
We're #1

6 target areas to collaborate and grow CA membership!

LAP #	Name of Idea	How it Works	Success Signals	How can the state help?
#1 Outreach/ Engagement	Career Fair	Partnership w/ Chambers, Colleges, carriers, agencies looking to hire - for promotion of industry & internships	Education about industry People get hired get internships get mentoring	Coordinate Scholarships - events, dues
#2 Partnership Program	Stakeholders Roundtable	ER associations, WC associations, CalCPA, etc. How do we grow? joint event to brainstorm collaboration	New membership Sponsor agent attendance events coalition building	Connections to the different groups that we want to gather
#3 Event/ Community Building	External activity at health fairs	Getting brokers connected to community	Lead generations More carrier partners	Resources for promotion - tools
#4 Leadership Succession	State go to more member events to promote board participation	Leadership takes active role in recruiting new board and general members	Healthier boards Deeper benches Attendance @ mtg	see the idea column collateral, merch
#5 Onboarding	Bi Annual State Member Leadership Training	Farm Team	No Volun-told	Manage the Mtgs
#6 Retention	Board takes 15 minutes	Membership arranges and manages list	calls get made People get touches from a variety of board members	Reporting and contests



CA RACE TO RECRUIT 2025-2026



START

FINISH

OUTREACH/ ENGAGEMENT



What ways can you actively cultivate new members and/or retain current members?

SOLUTION (IDEAS)

- Career Fairs at Colleges (local community colleges target)
- Red Carpet Treatment - more personal emails/phone calls with invitations
- Share the Emerging Leaders programs as an opportunity (target date to start is February 2026 - announce at Innovate)

LEADERSHIP SUCCESSION



What are some ways you can begin converting an active member into chapter leadership roles?

- 3 Month Program to engage young members - not organization specific
- Invite potential leaders to the CAHIP Farm Team Meetings

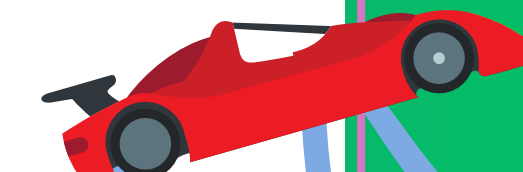
EVENT/ COMMUNITY BUILDING

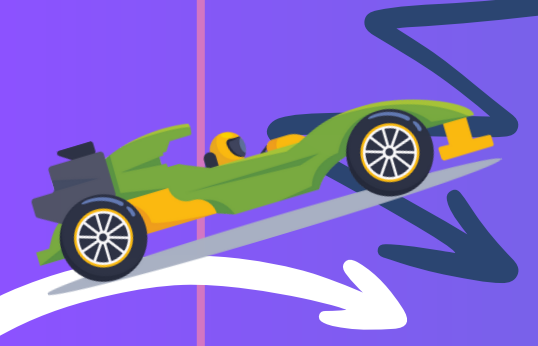


What strategies can you implement for local chapter events that allow you to connect members, and decrease the volunteer time needed to pull them off?

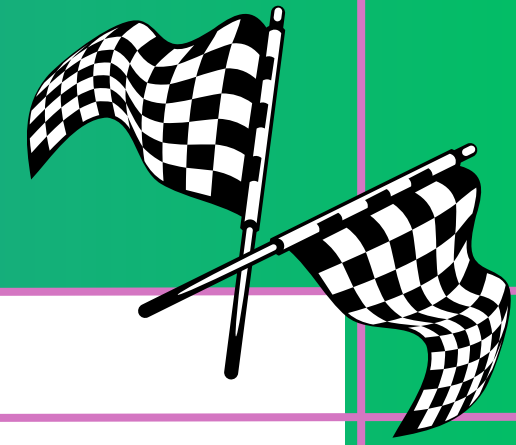
- Offer more social events at no \$\$\$, organize a no host bar networking event at a local venue and remember to think outside the typical alcohol related activities for those that dont imbibe!

Let's Go!



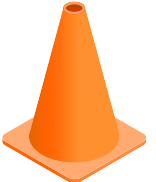
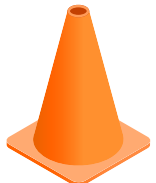
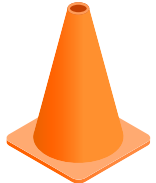


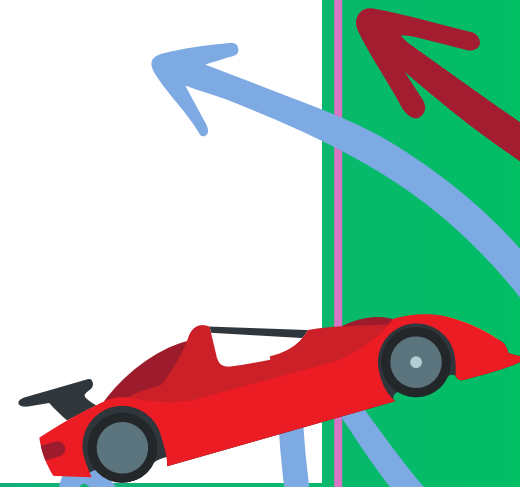
CA RACE TO RECRUIT 2025-2026



START

FINISH

	DESCRIPTION	SOLUTION (IDEAS)
<p>PARTNERSHIP PROGRAMS</p> 	<p>How can you better collaborate with different audiences either for membership or sponsorship?</p>	<ul style="list-style-type: none"> • Collaborate with other orgs (NAIFA, Chambers, etc) • Partner with GA's to get information to a new audience • Captives/Large agency partnerships
<p>ONBOARDING</p> 	<p>What activiteis could you implement that would help a new member understand the different resources available as a member value?</p>	<ul style="list-style-type: none"> • Personal invites from board members in the first year of membership
<p>RETENTION</p> 	<p>What activities could help ensure members renew their membership year over year?</p>	<ul style="list-style-type: none"> • Board spend 15 mins at each meeting calling members • Outreach to lapsed member lists • Pair with a mentor at 2nd year of membership



Let's Go!



CAHIP STRATEGIC PLANNING - STATE LEADERSHIP TRAINING

May 12, 2025

1:00pm

In attendance:

Kim Ball
Bruce Benton
David Brabender
Patrick Burns
Barbara Ciudad
Cherie Crutcher
Jordan Futch
David Garcia
Craig Gussin
Ricky Haisha
Jack Holder
Vanessa Ignacio
David Johnston
Cathy Little
Tim Kanter
Dede Kennedy
Rosamaria Marrujo
Dawn McFarland
Jennifer McKenzie
Rod Owen
Janet Powelson
Paul Roberts
Irma Romero
Kerri Sanford
Patrick Snitchler
Patricia Stiffler
Elizabeth Underhill
Ashley Wong
Brad Wright
Kerry Wright