



Strategic Planning 2025-2026 Including Board Orientation and Training

Strategic Planning Framework

- Mission, Vision & Core Values

NABIP's Mission Statement

NABIP advocates for our members and their clients, provides professional development and delivers resources to promote excellence.

CAHIP's Mission Statement

CAHIP will improve its members ability to meet the health, financial and retirement security needs of all Californians through education, advocacy, legislation and professional development.

NABIP's Vision Statement

NABIP is the preeminent organization for health insurance and employee benefits professionals and works diligently to ensure all Americans have access to high quality affordable Healthcare and related services.

CAHIP's Vision Statement

Every Californian has access to solutions for health, financial and retirement needs, through services provided by insurance professionals.

CAHIP-LA Who We Are

CAHIP-LA was organized in 1979 to fill the need for a local organization of professionals who help individuals and companies understand different health insurance products so they can make the best decision for their coverage, whether they are buying an individual policy or coverage for hundreds of employees.

The formation of CAHIP-LA has allowed insurance brokers and agents to provide a high level of knowledge and expertise to their clients through focused member education. Equally important, our members have a voice in determining their own professional future and have impacted the legislation affecting all that purchase health care.

The national association under which we are organized, the National Association of Benefits and Insurance Professionals ("NABIP"), was formerly known as the "National Association of Health Underwriters" ("NAHU") and our local name was previously the "Los Angeles Association of Health Underwriters" ("LAAHU"). The national, state, and local chapters changed names in 2024 in order to reflect the modern ways in which we do business.

- Environmental Scan / Situation Analysis
- Strategic Goals / Objectives
- Strategies and Initiatives
- Performance Metrics / KPIs
- Implementation Plan / Action Plan
- Evaluation and Review

Strategic Pillars

1. Operational Excellence – Build an efficient, transparent, and high-performing organization that enhances member experience and internal alignment.
2. Financial Vitality – Ensure sustainable growth through diverse revenue streams, value-based offerings, and expanded partnerships.
3. Influence & Impact – Strengthen NABIP’s voice and visibility in shaping policy, informing the public, and leading industry change.

NABIP Structure

[Board of Trustees](#)

Executive Committee (*Elected by Membership Delegates*)

President
 President-Elect
 Vice President
 Treasurer
 Secretary
 Immediate Past President

Council Chairs (*Appointed by NABIP Vice President at Manager level*)

Legislative Council Chair
 Membership Council Chair
 Professional Development Chair

Regional Vice Presidents (*Elected by Regional Membership Delegates*)

[National Committees \(Standing\)](#)

Legislative Council
 Membership Council
 Professional Development Council
 Nominations & Elections Committee (*P&P*)
 Governance Committee (*Appointment between President-Elect & Vice President*)
 Arold R. Gordon Award Committee (*P&P*)
 Personnel Committee (*P&P*)

[National Committees \(Special\) \(Appointment by President-Elect\)](#)

Member Recognition Committee
 Leading Producers Round Table
 Leadership Development Committee
 Marketing & Communications Committee
 Diversity, Equity, Inclusion & Belonging
 Event Planning Committee
 Delta Force Committee

Notes:

- All Managers and Vice Chairs must be reviewed by Governance Committee and approved by the Board of Trustees.
- Various Leadership Teams (LMT, MMT, etc.) per P&Ps.
- Finance Committee per P&P.
- Leadership application process.

[NABIP-PAC](#) (*NABIP-PAC Bylaws. Manager appointed by NABIP Vice President*)

[NABIP Education Foundation](#) (*Foundation Bylaws*)

[NABIP Regional Teams and Management](#) (*Appointed and/or coordinated by/with RVP*)

- Representation on NABIP Councils and Committees
- Communicate and collaborate within region and state chapter leadership
- Act as liaison between chapters, national committees and Board of Trustees
- Conduct Regional Leadership Conferences

NABIP Staff

CEO

Government Affairs

Membership Affairs (including Corporate Accounts)

Professional Development

Communications

Public Relations

Strategy & Innovation

CAHIP Structure

[Board of Directors](#) (Elected by Chapter Delegates)

Executive Board/Officers

President

President-Elect

Immediate Past President

Vice President Finance

Vice President Legislation

Vice President Membership

Vice President Professional Development

Vice President PAC

Vice President Public Affairs

Vice President Corporate Relations

Vice President Communications

Vice President Community Outreach (*Appointed by President. Board Approval*)

[State Committees \(Standing\)](#)

Executive Committee

Membership Committee

Legislation Committee

Professional Development Committee

Communications Committee
 Finance Committee
 Political Action Committee
 Public Affairs Committee
 Nominations Committee
 Governance Committee

AD HOC Committees (Appointed by President. Board Approval)

Medicare
 Awards

Local Chapter Presidents and President-Elects (Voting members of the Board)

CAHIP-PAC (CAHIP-PAC Bylaws. Vice President PAC sits on CAHIP Board of Directors)

CAHIP Education Foundation (CAHIP Foundation Bylaws)

Association Manager

CAHIP-LA Structure

Board of Directors (Elected by Local Membership)

Typical “Old-School” Board

Executive Committee
 President
 President-Elect
 Treasurer
 Secretary
 Immediate Past President

Directors

Membership
 Vanguard
 DEI&B
 Medicare
 Professional Development (Programs)

Legislation
 Media Relations
 PAC (State & Federal)
 Community Outreach

Communications

Awards

At-Large

Association Management

Reinvent: Mission Critical

Executive Committee
 President

Secretary/Treasurer

Immediate Past President

Membership Affairs Team
 (Member Value and Support)

Public Affairs Team
 (Advocacy)

Marketing & Communications

Core Capacities

Liaison to State and National Teams (Advisory)
 Manage Chapter Affairs
 Governance and Calendar Management
 Strategic Planning
 Leadership Development
 Manage Corporate Affairs
 Manage Chapter Delegates

Liaison to State and National Teams
 Membership Growth and Retention
 Manage Corporate Members
 Member Support and Experience
 Member Value

Liaison to State and National Teams
 Manage CapCon and Capitol Summit
 Manage Adopt-a-Legislator Efforts
 Strategic Public Relations and Media
 (Coordinate with Kelly Loussedes, NABIP)

Member Experience
 Social Media

Board Support and Advisory
 Past-President Council (New)

Job Descriptions (Simplified)

Define roles and minimize burden (Association manager) Where is the heavy lift?

- President
 - Conduct Board of Directors meetings
 - Manages strategic plan (Traffic Cop)
 - Sets Association calendar
 - Manages Governance Calendar
 - Sitting member of CAHIP Board of Directors
 - Provide updates on NABIP and CAHIP activities
 - Corporate partner relations
- President-Elect
 - Shadow president
 - Support strategic plan
- Treasurer
 - Chair of Finance Committee
 - Financial stewardship to the Board of Directors and members
- Secretary
 - Communicate Board of Directors meeting agenda and minutes
 - Minutes of Annual Meeting
- Immediate Past-President
 - Chair of the Nominations & Elections Committee
 - Chair of the Governance Committee
- Membership Chair
 - Sit on State membership calls
 - Volunteer recruitment
- Medicare Chair
- Legislation Chair
 - Sit on state Legislative Council calls
 - Coordinates state and federal legislator visits at Capitol Conference and Capitol Summit. Caucus organization.
- PAC Chair (State and Federal)
 - Sit on state PAC calls
 - Promote PAC contributions and Grasstops
- Professional Development Chair
 - Chair of programs committee
 - Sit on state Professional Development calls
 - Upload events to CAHIP Website (End of July)
- Communications Chair
- Awards Chair

Association Manager

- **Support Role of the President**
- Banking and investments
- Tax filings (Form 990 by November 15)
- Insurance contracts
- Website

- Event promotion development, member communications and payment mechanisms
- Member communications
- Arrange conference calls
- Google Drive Organization
 - Board meeting minutes (retention and website)
 - Annual Meeting minutes (retention and website)
 - Financial summary (retention and website)
- Institutional and procedural management (P&Ps, Annual Meeting Logistics, governance calendar)
- What else?
 - Antitrust statement on website
 - Photo gallery
 - Explore snail mail and text messaging

2025-2026 Priorities

- Continue momentum. Mission critical
- Board Relations, E-Mail Etiquette, Response Time, Speaking with One Voice (Social Media)
- CAHIP-LA Bylaws and Policies & Procedures (P&Ps)
- Prepare for hibernation period (Q4). Focus on Q3. Circle back to Q1 & Q2 (mid-year checkup)
- Succession planning
 - Vice chairs and committees (Back up and replacements)
 - Filling voids in leadership
 - Find your replacement
- Value of membership embedded into culture
 - Succinctly define our mission, vision and purpose to the Board, our members and corporate partners
 - Talking Points
 - NABIP Impact Report
 - Online Institute
- Fund raising (Corporate Partner Structure)
- Establish focus groups
 - Young professionals
 - GA partners (including individual engagement campaigns)
 - Coalition and Industry Partners (Sister Associations, Property & Casualty, Pihra, CIAB, IIABCal)
- CAHIP Outreach
 - One Day Capitol Summit
 - Statewide D&O policy

Association Calendar (Establish dates/times)

Monthly Board of Directors Meeting

- Third Thursday of each month at 10:00am

Monthly Finance Committee Meeting

Monthly Executive Committee Meeting

Monthly Governance Committee Meeting
Monthly Programs Committee Meeting

Region 8 August 20-21 Seattle

Capitol Conference

Capitol Summit

Annual Convention

CAHIP-LA Member Events

Medicare Summit (August/September)

Holiday Party (December)

Annual Convention (April)

Day at the Races (June)

Annual Meeting (June)

Virtual Events (Medicare Coffee Chat = 30, Breakfast Bites = 5)

Refund Policy & Dietary Restrictions

Budget

Minimum Revenue

Corporate Affairs

CD Process

Reserve

Board Member Goals (3):

Bruce Benton (President)

- Build volunteerism and chapter leadership
- Build corporate affairs structure (general plea and video)
- Pacesetter Award

Elka Soussana (Medicare Chair)

- Find a Medicare Vice-Chair that is in-line with CAHIP-LA's Mission and Vision by Aug 1st
- Calendar all Medicare related events for the remainder of the fiscal year before the Medicare Summit (Sep 4th)
- Create policies and procedures for the Medicare Chair Seat by Oct 1st