



- Your local chapter of CAHIP & NABIP

CAHIP LOS ANGELES

Strategic Planning & Board Leadership Workbook

2026–2027

Board orientation, strategic framework, and working reference for CAHIP-LA leadership. Includes mission & vision, SWOT analysis, membership growth strategy, organization structure, role descriptions, priorities, and board member goals for the 2026–2027 term.

Leadership. Advocacy. Community. Excellence.

Mission, Vision & Core Values

NABIP

MISSION

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

VISION

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

MISSION

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.

VISION

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

CAHIP-LA

MISSION

Fostering a vibrant community of insurance professionals – in collaboration with CAHIP and NABIP – dedicated to educating, advocating, and leading positive change in our industry and community.

VISION

CAHIP-LA is the premier community where insurance professionals are united, empowered, and recognized for setting the standard of excellence in service, advocacy, and community impact.

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 buying an individual policy or coverage for hundreds of employees. Our members provide a high level of knowledge and expertise to their clients through focused member education, and have a voice in shaping legislation affecting all who purchase health care.

A NAME THAT REFLECTS TODAY

NABIP was formerly the National Association of Health Underwriters (NAHU); our chapter was previously the Los Angeles Association of Health Underwriters (LAAHU). The names changed in 2024 to reflect the modern ways we do business.

SWOT Analysis & Operational Review

Website Reviews

NABIP WEBSITE

Training requires board members to complete online courses, tracked for award points. "Find an Agent" is a public registry for member referrals.

CAHIP WEBSITE

Calendar is a manual submission process through the CAHIP website; can require follow up to ensure accuracy. Legislative Resources hosts the priority bill list from the annual "Bill Review," setting the state's advocacy positions.

CAHIP-LA WEBSITE

Policies & Procedures currently sunset every three years. Proposed change: amend to be evergreen, continuing until reauthorized – the sunset rule is often ignored, creating policy gaps.

STRENGTHS

- Membership – skills, expertise, resources
- Volunteerism – capability and dedication
- Collaboration
- Community
- Networking
- Education
- Advocacy

WEAKNESSES

- Stagnant & declining membership
- Leveraging members and volunteers
- Declining compensation of agents
- Aging membership, not appealing to young
- Communication about education & membership value
- Outdated approach for young/new members

OPPORTUNITIES

- Social media
- 425,000 licensed agents in LA (minus inactive)
- Outreach to entrepreneurial individuals
- Redesign org for new generation of agents
- New sponsors from periphery & general business
- Co-branding & enhanced email lists

THREATS

- Declining compensation of agents
- Regulator/legislator disregard for agent role
- Consolidation of agencies
- Competing orgs – EBPA, HAFA, NAIFA, WIFS
- Members come and go – cancellations
- Annual leadership changes disrupt continuity

Membership Growth & Organization Structure

GOAL: ADD 50–100 NEW MEMBERS

Become the largest chapter in the country.

THE SOLUTION

Use co-branded events to drive membership growth.

THE MODEL

A partner pays new members' first-year dues.

PARTNER BENEFIT

Gains access to CAHIP-LA's brand and advocacy.

CAHIP-LA BENEFIT

Leverages the partner's network (e.g. 25,000-agent list) for growth.

SAFEGUARDS

- Vet partners for alignment with mission & values
- Strong onboarding & retention process
- Right of first refusal for existing annual sponsors

Organization Structure

BOARD OF DIRECTORS



EXECUTIVE COMMITTEE



COMMITTEE CHAIRS



Membership Legislation Programs Communications PAC

Awards

Our Purpose

To unite, empower, and recognize insurance professionals while championing the value we bring to our clients, industry, and community.

Detailed Organization Structures

NABIP

- Board of Trustees
- Executive Committee: President, President-Elect, VP, Treasurer, Secretary, Immediate Past President
- Council Chairs: Legislative, Membership, Professional Development
- Regional Vice Presidents
- National Committees: Legislative, Membership, Professional Development, Nominations & Elections, Governance, Awards, Personnel
- Special Committees: Member Recognition, Leading Producers, Leadership Development, Marketing & Comms, DEI&B, Event Planning, Delta Force
- NABIP-PAC & Education Foundation
- Staff: CEO, Government Affairs, Membership Affairs, Professional Development, Communications, Public Relations, Strategy & Innovation

CAHIP

- Board of Directors / Executive Board: President, President-Elect, Immediate Past President
- VPs: Finance, Legislation, Membership, Professional Development, PAC, Public Affairs, Corporate Relations, Communications, Community Outreach
- State Committees: Executive, Membership, Legislation, Professional Development, Communications, Finance, PAC, Public Affairs, Nominations, Governance
- Ad Hoc Committees: Medicare, Awards
- Local Chapter Presidents & President-Elects (voting members)
- CAHIP-PAC & CAHIP Education Foundation
- Association Manager

CAHIP-LA

- Board of Directors (elected by local membership)
- Executive Committee: President, President-Elect, Treasurer, Secretary, Immediate Past President
- Directors: Membership, Legislation, Communications, Awards, At-Large
- Vanguard, DEI&B, Medicare, Professional Development (Programs)
- Media Relations, PAC (State & Federal), Community Outreach
- Association Management

CAHIP-LA Board: Old-School vs. Reinvented

Typical "Old-School" Board	Reinvent: Mission Critical	Core Capacities
Executive Committee	Executive Committee	Liaison to State & National Teams (Advisory)
President	President	Manage Chapter Affairs
President-Elect	—	Governance & Calendar Management
Treasurer / Secretary	Secretary/Treasurer	Strategic Planning
Immediate Past President	Immediate Past President	Manage Corporate Affairs, Chapter Delegates
Membership / Vanguard / DEI&B / Medicare	Membership Affairs Team	Growth, Retention & Member Support
Legislation / Media / PAC / Community Outreach	Public Affairs Team	CapCon, Capitol Summit, Adopt-a-Legislator
Communications / Awards	Marketing & Communications	Member Experience, Social Media
At-Large / Association Management	—	Board Support, Past-President Council (New)

Job Descriptions (Simplified)

President

- Conduct Board meetings; manage strategic plan
- Sets Association calendar & governance calendar
- Sitting member of CAHIP Board of Directors
- Corporate partner relations

President-Elect

- Shadow president
- Support strategic plan

Treasurer

- Chair of Finance Committee
- Financial stewardship to Board & members

Secretary

- Communicate Board meeting agenda & minutes
- Minutes of Annual Meeting

Immediate Past-President

- Chair, Nominations & Elections Committee
- Chair, Governance Committee

Membership Chair

- Sit on State membership calls
- Volunteer recruitment

Medicare Chair

- Owns Medicare program area

Legislation Chair

- Sit on state Legislative Council calls
- Coordinate legislator visits, Capitol Conf/Summit; caucus organization

PAC Chair (State & Federal)

- Sit on state PAC calls
- Promote PAC contributions & grassroots

Professional Development Chair

- Chair of programs committee
- Sit on state PD calls; upload events to CAHIP site (by end of July)

Communications & Awards Chairs

- Own chapter communications and awards programs

Association Manager

Support role of the President · banking & investments · tax filings (Form 990 by Nov 15) · insurance contracts · website · event promotion, member communications & payment mechanisms · conference calls · Google Drive organization · retention of Board/Annual Meeting minutes & financial summaries · P&Ps and governance calendar

2026–2027 Priorities, Calendar & Budget

Strategic Priorities

1

Board relations & communication norms

2

Bylaws & Policies/Procedures refresh

3

Succession planning & leadership pipeline

4

Value of membership embedded into culture

5

Corporate partner & fundraising structure

Association Calendar

- Monthly Board of Directors Meeting – 3rd Thursday, 10:00am
- Monthly Executive, Finance, Governance & Programs Committee Meetings
- Region 8 Conference – August 20–21, Seattle
- Capitol Conference & Capitol Summit
- Medicare Summit (Aug/Sept) · Holiday Party (Dec)
- Annual Convention (Apr) · Day at the Races (June) · Annual Meeting (June)
- Virtual Events: Medicare Coffee Chat, Breakfast Bites

Budget & Talking Points

- Minimum revenue, Corporate Affairs, CD process, reserve policy
- NABIP Impact Report & Online Institute
- Focus groups: young professionals, GA partners, industry coalitions
- One Day Capitol Summit; statewide D&O policy

Board Member Goals

KERRY WRIGHT • President

- Build volunteerism & chapter leadership while increasing membership 20%
- Lead CAHIP-LA to at least Gold Certification
- Help CAHIP-LA achieve the Pacesetter Award

BRUCE BENTON • Immediate Past President

- Chair, Nominations & Elections Committee (full process incl. Annual Meeting)
- Chair, Governance Committee (review P&P, recommend sunset provision)
- Act in advisory role

ELKA SOUSSANA • Medicare Chair

- Find a Medicare Vice-Chair aligned with CAHIP-LA's mission by Aug 1st
- Calendar all Medicare events before the Medicare Summit
- Create Medicare Chair seat P&Ps by Oct 1st

NAAMA O. POZNIAK • Membership

- Increase value for members – make membership everyone's goal
- Create FOMO around events with new content & conversations
- Ensure all CAHIP-LA members renew & love our members

JOSHUA SCHNEELOCH • Awards

- Double paid membership: grow ~200 → 400 via recognition, co-branded events, join-at-the-event offer
- Build a recognition culture: 4 co-presented awards
- Build platform & funding: podcast/YouTube, Live Case Clinic, mentorship, college pipeline, grants, media kit

JONATHAN EDEWARDS • Communications & Media

- Grow digital engagement Increase newsletter frequency, expand social media reach, and add Instagram with streamlined scheduling tools.
- Support board operations Use automated monthly reminders to help board leaders stay aligned with the annual planning calendar.
- Strengthen outreach and connection Conduct annual phone and virtual touchpoints with members and industry professionals to encourage participation and highlight available resources.
- Expand audience reach