



CAHIP

Orange County

# Strategic Plan

2025 - 2026



# Agenda

Board Member Goals and Plans

- **Haley Mauser**, VP of Membership, **Melissa Calabretta**, Retention Chair & **John Austin**, New Member Liason
- **Tracy Hanson**, VP of Legislation
- **Dorothy Cociu**, VP of Communications & Public Affairs
- **Ailene Dewar**, Social Media Chair
- **Gabriella Belizzi**, VP of Professional Development
- **Cathy Daugherty**, VP of NABIP & CAHIP PAC
- **Maggie Stedt**, Medicare Chair
- **Pat Stiffler**, Public Service Chair
- **Juan Lopez**, VP of Finance/Treasurer & Secretary
- **Becky Capelouto**, Awards/Historian Chair
- **Anne Kelly**, Corporate Sponsorship Chair
- **2025-2026 Calendar**



# Membership Goals & Action Plan

**Haley Mauser**  
VP of Membership

**Melissa Calabretta**  
Retention Chair

**John Austin**  
New Member Liason

# Membership Goals



## Recruiting New Members

### **Increase membership by 15%**

- Currently membership sits at 241.
- Last fiscal year, we ended at 252.



## Retaining Current Members

### **Retain 90% of current members.**

# Membership Action Plan

- Membership Contests
  - \$100 Giveback – Senior Summit (NABIP \$50?)
  - \$50 Giveback – Sales Symposium
  - WIB Membership Drive?
  - Ongoing Campaign 3-6 months
    - Call campaign?
- New Member Orientations - Calendar 6 meetings
- **Budget Request: \$5,000**
- Establish Recruitment Materials
  - Create marketing pieces of “What We Do”
    - ✓ The Value of Membership
    - ✓ Advocacy: List of Ledge Bills that have been passed or blocked
    - ✓ Education
    - ✓ Networking
    - ✓ And more...
- Establish Mentor Program for New & Existing Members



# **Legislative Goals & Action Plan**

**Tracy Hanson**  
VP of Legislation

# Legislative Goals & Action Plan

<b>Scheduling Legislative Appointments in Washington DC and Sacramento</b>	
6 weeks prior to event	call legislative offices to get name and email address for the Scheduler
5 weeks prior to event	send an email to all legislative offices requesting a meeting
4 weeks prior to event	send a 2 <sup>nd</sup> request to legislators who did not respond to prior email
3 weeks prior to event	send a 3 <sup>rd</sup> request to legislators who do not respond to prior emails
2 weeks prior to event	call the Scheduler to request a meeting
1 week prior to event	call the Scheduler again requesting a meeting
One participant for each meeting should be a constituent or have their business in the legislative district.	
Set-up a legislative meeting to review talking points, how to prepare for each legislative meeting, dress code, what items to bring to the meeting, follow-up after the meeting, what you can and cannot say during the meeting	

# Legislative Goals & Action Plan (Continued)

- **In District Meetings:** Purpose is to build a relationship with the Staff, discuss pending legislation, discuss the role of the agent, offer to put on a townhall meeting, show up a fundraising events with PAC money
- **Articles:** Write a monthly article for The Coin
- **General Meetings:** Give a legislative update at each general meeting
- **Board Meetings:** Attend all board meetings and give a legislative update
- **CAHIP Legislative Committee:** Participate in all CAHIP legislative calls
- **NABIP Legislative Calls:** Participate in all NABIP legislative calls

NABIP  
2024 Gold Certified

# COIN

NABIP  
2024 Placemeter Award

County of Orange Insurance News



**Special Events  
Celebration Issue**

- Annual Meeting & Cinco de Mayo Celebration May 6th
- Women in Business Celebration May 30th
- Annual Charity Golf Event Photos and Coverage from April 21st

**Also inside this issue**

- Feature Article: Agents Helping Clients: California Pay Transparency Act
- Legal Briefs from Mariya Monahan, Monahan Law Office
- ACA Compliance for AEs: Watching Your Number of Full-Time Equivalent Employees to Avoid ACA Penalties
- The Legal Consequences of Using Cal-CCBRA When an Employer Outgrows the 20-Employee Threshold

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# Communications and Public Affairs

**Dorothy Cociu**  
VP of Communications  
& Public Affairs

# Communications Goals

- Produce one COIN issue (electronic single page pdf and paper) every 2 months beginning July/August 2025
  - First week of the month (release date)
  - Articles and ads due 30 days prior to the first month of that issue (ie July/August is June 1)
- Expand COIN by 4-8 pages when content and advertising warrants (ie assure content v ads)
- Offering sponsor and non-sponsor advertising
- Compliance Corner regular column featuring Marilyn Monahan (Monahan Law Office) with a Legal Updates column
- Promote Chapter Events and Membership Information in each COIN issue
- Promote CAHIP and NABIP meetings
- Include content to increase points for all awards (Pacesetter, CAHIP awards, Legislative Awards, etc.)
- Provide high-quality content in each of the COIN, including feature articles and in-depth agent information



# Social Media Goals & Action Plan

**Ailene Dewar**  
Social Media Chair

# Social Media Goals



## Goal:

To grow following and gain new members while also engaging current members



## Mission:

To post 5-7 times per week using tools and support



## Vision:

Activity = Results

- LinkedIn: To be in top 2 of CA comparable accounts, grow following (941) by 250 (207 in last 365 days).
- IG (39) & Twitter (83) - grow by 25 followers.
- Facebook from 117 to 150 followers.

# Social Media - Current Activity

- Current activity: Posting recap of events, registration links, sponsorships, points + Engagement ALL manual
  - Linked In
    - 275 posts in last 365 days
      - 68,718 Impressions
      - 252 comments
      - 3,690 reactions
      - 88 reposts

Budget Request: \$1500  
for HootSuite



# Professional Development Goals & Action Plan

**Gabriella Bellizzi**  
VP of Professional  
Development

# Professional Development Goals

- Schedule all events at least 60-90 days in advance
- Offer highest quality programs for members
- Prepare a quarterly programs event schedule for website, promotions in The COIN and other promotions
- Provide CE programs and assist with CE filings for at least 75% of all programs for CAHIP-OC
- Provide a member survey to determine the wants/needs of members and incorporate into programs when possible
- Offer a 2-track program for Sales Symposium 2026

# Professional Development Plan

- August: Webinar
- September: Senior Summit
- October: Week of Webinars
- November: Happy Hour
- December: Holiday Boat Cruise
- January 2026: AI Speaker and Panel
- February: Legislative Update
- March: Sales Symposium – Tech and Medicare (2 tracks)
- April: Webinar
- May: Membership Recognition event
- June: Women In Business Luncheon

# NABIP PAC

**Cathy Daugherty**  
VP of NABIP & CAHIP  
PAC



# NABIP PAC

What is the National Association of Benefits and Insurance Professionals Political Action Committee (NABIP PAC)?

- NABIP PAC is a separate segregated fund (SSF) that allows for political advocacy from the connected organization -- in this case, NABIP.
- For this reason, the PAC (candidate fund) is restricted to raising money from dues-paying members.
- PAC money is NOT tax-deductible. Contributions are not deductible for state or federal tax purposes.
- NABIP PAC has two different accounts:
  - Candidate Account
  - Administrative Fund

# NABIP PAC

## **Candidate Account**

- Made up of individuals' contributions through personal credit cards or bank accounts.
- Funds from this account are given to political candidates, both challengers and incumbents, Democrats and Republicans.
- NABIP members, their spouses and NABIP staff can give up to \$5,000 each year (federal law).

## **Administrative Fund**

- Businesses can contribute to the Admin Fund.
- State and local chapters can also contribute.
- Money in this account goes to the operating costs of NABIP PAC so that the Candidate Account can be reserved solely for political contributions.
- Unlike the Candidate Account, there are no contribution limits on the Administrative Fund.

# NABIP PAC

How does the NABIP PAC money we donate get spent by candidates?

- Winning Senate candidates spent an average of \$16 million in 2022.
- On average, \$2.0 million was spent to win a House seat in 2022.
- A NABIP PAC donation of \$2000 is just one in 2000 groups of people contributing to total amount needed to win that House seat.
- Needless to say, members of Congress have many groups like NABIP that expect their legislative agendas to become a priority through their donation.
- **Through NABIP PAC, NABIP gets time and access to members of Congress to advocate on behalf of agents and brokers.**

What are the rules for communication of available money for Candidate Account Fund?

- A member of Congress and his or her staff are never allowed to discuss the campaign or fundraising while using government resources. This includes in their office, while they are working on a Congressional activity, or using an email or phone number provided by the member's office.



# Medicare Objectives

**Maggie Stedt**  
Medicare Chair

# Medicare Objectives

- Plan and Hold 13<sup>th</sup> Annual Senior Summit
  - 50 new CAHIP OC Members
  - Provide \$20,000 to \$30,000 to CAHIP OC for Conference Attendance and PAC Donations
  - Attract new sponsors and exhibitors to other CAHIP OC events
- Launch and Manage OC Medicare Roundtable with Juan Lopez as co-chair.
  - Group will meet monthly or quarterly to attract and support Medicare focused agents/carrier/GA and FMO reps
- Provide Articles and other content focused on Medicare issues and concerns (COIN/Cal Broker and other publications)
- Provide two new CE courses for Medicare focused agents



# Public Service Goals & Plans

**Pat Stiffler**

Public Service Chair &  
WIB Chair

**Juan Lopez**

Golf Tournament Chair

# Public Service Goals

- Women In Business – Pat Stiffler
  - Sell all Sponsorships
  - Find ways to increase revenue and cut costs where appropriate.
  - \$60K in Contribution to New Hope – Stretch Goal \$70K
- Golf Tournament – Juan Lopez
  - Sell all Sponsorships
  - Include Second Event – Wine Tasting
  - \$20K to \$25K in Contribution to Cystic Fibrosis Foundation



# Financial Goals & Plans

**Juan Lopez**  
VP of  
Finance/Treasurer &  
Secretary



# Awards Goals & Plans

**Becky Capelouto**  
Awards/Historian Chair

# Award Goals

- NABIP Award Goals
  - Pacesetter
  - William Flood
  - Professional Development
  - Presidential Citation
  - Media Relations
  - Legislative Excellence
- CAHIP Award Goals
  - Chapter of the Year
  - Outstanding Local Chapter Newsletter
  - Web Site of the Year



# Corporate Sponsorship Goals & Plans

**Anne Kelly**  
Corporate Sponsorship Chair



# Media Liasion Goals

- **Minimum of 6 Press Releases Sent to Media Contacts**
  - New Board
  - Sales Symposium
  - Pinnacle Award Winner
  - Awards
  - Golf Tournament
  - Women In Business Luncheon

# Thank You

"Coming together is a beginning,  
staying together is progress, and  
working together is success."

- Henry Ford

