National Association of Benefits And Insurance Professionals
Northern Nevada Chapter

Annual Strategic Planning Meeting
June 24, 2025 1:30 PM – 2:50 PM
4600 Kietzke Lane, Building G-160, Reno, NV
Via Zoom – Meeting ID = us02web.zoom.us/j/84698950624

Attendance Report: Aliana Rushing, Georgana Cepeda, Joy Gardner, Gina Espinal-Aguerre, Mary Lou Urrutia, Don Goldmann, Ross Pendergraft, Julie Ann Evans, Merre Gregory

Virtual Attendance: Dave Sherrill and Ashley Kapostins

Absent: Jay Eldridge and Molly Moreno

Guests: Breeze Yerves, Adrienne Saintil, George Beach, Douglas Boulton and Chanté Padilla

1. Meeting called to order by incoming President Aliana Rushing at 1:30 PM.

2. Roll call of attendees was taken by sight for those attending in person and on Zoom by incoming Secretary Chanté Padilla. Quorum confirmed. Connectivity confirmed.

3. Welcoming comments by incoming President Aliana Rushing with a special welcome to Incoming Board officers and guests.

4. Review of agenda and order of business comments by incoming President, Aliana Rushing.

5. Review of the chapter's current mission statement by incoming President, Aliana Rushing.

    a. Discussion of chapter's mission statement.

        i. Agreement among all meeting participants that no changes were needed.

6. Review of the chapter's current vision by incoming President, Aliana Rushing and added into the addendum.

    a. The current Vision is available for review on the chapter's website.

7. Review of the chapter's By-Laws by incoming President, Aliana Rushing.

    a. The current By-Laws are available for review on the chapter's website.

8. Review of the chapter's significant P&Ps by incoming President, Aliana Rushing.

    a. All current P&Ps are up to date and posted on the chapter's website which is nabipnn.org

    b. Discussion of the budget deadline P&P was held with emphasis placed on the fiscal year 2025 budget being balanced and submitted to the board no later than the October meeting, with approval by November 1st by a board or email vote.

    c. Discussion of the travel P&P's internal limits, designed to ensure that anyone using chapter money has some "skin in the game", such as a limit of $75 a day for meals and a total allowable reimbursement capped at a level defined in the budget each year, with participation at all events being required for reimbursement, unless the board votes to approve otherwise for special circumstances.

9. Goals of the meeting were reviewed with discussion on the difference between strategic planning and leadership training.

    a. Ross Pendergraft educated the meeting participants about the value of using the Pacesetter award criteria as the best guidebook for building a successful chapter.

        i. It was emphasized that the board members need to pay more attention each month so that information can be gathered earlier than last year in order to attempt to avoid a last minute "crunch time" for submitting awards.

        ii. Everyone was reminded to get their leadership training scheduled and everyone should commit to doing the leadership training on the national website.

10. Discussion of the chapter's goals for the board year 2025-26.

    a. **Goals of the incoming President, Aliana Rushing entered into minutes.**

        i. What did you wish had improved in your role last year (if applicable)? What would success look like this time around?

1. I was not president last year so I cannot speak on where I could have improved. Success to me is a president that is knee deep and involved with every chair, helping support where needed. I want each chair member to feel like I have their back as much as they have mine. Stronger together, right?

ii. What is one measurable goal you want to achieve in your role this year?

1. I would like to start doing monthly “news from the President” articles in our newsletters.

2. I would like to grow our small & large group member involvement.

3. I would like to create a timeline for every role's deadlines for certain tasks and create a longterm system that fosters success for every position, not just this board year, but as a guide for future board years as well.

4. As example, VP of Finance Proposed Budget deadline of November, Charity choosing, Expo Date planning, Nominations Committee appointing, etc.

5. I would like to see if there is a way to incorporate in the annual sponsorships that they advertise our monthly luncheons to their brokers, or provide us a call list of their brokers to reach out to.

iii. Are there any outdated processes or traditions in your area that could be refreshed or rethought?

1. I believe we have a great team put together.

2. My goal is to return back to primarily in person meetings. I find that they are more productive and more interactive on keeping the board as a team.

3. My next goal is to reconsider luncheon dates, potentially do a survey, to figure out if Wednesday is not a great day. For example, there was a year straight that many members couldn’t come because a carrier was holding weekly meetings on Wednesday.

4. I also would like to collaborate with Joy Gardner who is the VP of Finance. I want to find out if there is a way to smooth

out the registration and payment process. Potentially changing vendors, going to tap payment, etc. Some way that she can be more supported on our very busy events.

5. I would also like to explore what the best means to communicate with everyone on the board. I think a lot of "group emails" go missing or are hard to keep up. I'd like to collaborate with everyone on the board to figure out what is the best means of communication.

iv. What support do you need from the board or other officers to achieve your goals?

1. As president, I firmly believe that leadership is not a solo act—it's a team effort. A president is only as strong as the board that surrounds them. To achieve our goals, I need open communication, shared accountability, and a willingness from everyone to lean in with their ideas and talents. I don't need perfection—I just need presence, participation, and honest collaboration. When we each bring our strengths to the table, we create something far more impactful than any one of us could do alone.

b. Goals of the Vice President, Georgana Cepeda, entered into minutes.

i. What did you wish had gone better in your role last year (if applicable)?

1. Looking back, I wish I had been more ahead of things more proactive instead of reactive. A few projects came together last minute, and while they worked out, they could've been even better with more time and planning this year. Success would mean being more organized, getting things moving earlier and feeling less rushed. I want to be more intentional and confident in how things come together.

ii. What would success look like this time around?

1. I'd love to increase engagement whether it's in membership events, attendance, participation, and meetings or just better communication overall. The measurable goal I'm aiming for is a 25% increase and turn out for at least one of our major events or programs. I think we have so much value to offer and I want to help more people connect with that.

iii. Are there any outdated processes or traditions in your area that could be refreshed or rethought?

1. Some of the ways we coordinate things like long email threads or waiting on last-minute approvals can slow us down. I think using simple tools like share docs or group chats could make collaboration a lot smoother. It doesn't have to be fancy, just something to help us stay aligned and avoid scrambling at the end.

iv. What support do you need from the board or other officers to achieve your goals?

1. I truly appreciate the support I've already received from the board. It's made a big difference at this point. I don't have any specific tasks, but just knowing I can reach out if something comes up is incredibly helpful. Staying connected, sharing feedback and continuing to collaborate as we have will help keep things moving in the right direction.

c. Goals of the Vice-President of Finance, Joy Gardner entered into minutes.

i. What is one measurable goal you want to achieve in your role this year?

1. Properly fulfill the obligations set out by the By-Laws and P&P for the position of Vice President of Finance.
2. Submit the fiscal year 2026 annual budget no later than the October monthly Board of Directors' meeting.
3. Work with all board members to have an affirmative vote of approval on the budget by November 1st as directed by the By-Laws.
4. Provide a mid-year, fiscal year 2026, updated budget and lead a discussion to review that year-to-date budget at the Annual Strategic Planning meeting.
5. Work with the Chairperson of the By-Laws and P&P Committee to review existing rules about the chapter's financial activities and promote changes as needed.
6. Work with other board members to assist them in submitting timely event budgets for board review as called for in P&P F-6.

7. Work with Kapsher Consulting to assure that all chapter financial documents are posted to the chapter website in a timely manner.
8. Submit updated and accurate financial reports at each monthly Board of Directors' meeting.

d. Goals of the incoming Secretary, Chanté Padilla entered into minutes.

i. What did you wish had gone better in your role last year (if applicable)?

   1. As this was my first year in the role, I am getting familiar with the responsibilities and expectations.

ii. What would success look like this time around?

   1. Success this year would mean having all board minutes recorded accurately, shared promptly, and consistently tied to our strategic goals and awards tracking. It would also include ensuring all deliverables and accomplishments are logged in a timely manner for recognition and awards submission. It is with great hopes to fulfill my role and responsibility as Secretary with efficiency and integrity.

iii. What is one measurable goal you want to achieve in your role this year?

   1. A measurable goal for me is to distribute meeting minutes within 3–5 business days after each board meeting and maintain a 100% on-time submission rate for all monthly deliverables.

iv. Are there any outdated processes or traditions in your area that could use a refresh or rethinking? If not, what new processes need to be integrated into your role to improve it?

   1. This may already be in force, however does everyone have access to a centralized cloud storage (like Google Drive or OneDrive) so they can access minutes should they need to more easily? If not, I prefer us to switch to this.

v. What support do you need from the board or other officers to achieve your goals?

   1. Clear and timely communication from all board members, especially when confirming action items and deliverables,

would help immensely. I would also benefit from occasional check-ins or guidance from experienced officers to ensure I’m aligning with award criteria and expectations.

e. Goals of the director of Programs, Aliana Rushing entered into minutes.

i. What did you wish had improved in your role last year (if applicable)? What would success look like this time around?

1. I do not believe that the luncheon advertisements are going out in a way that reaches our membership or our attendees. I would like to brainstorm with the board on an effective way to get our luncheon attendance up. I’ve got feedback from the Expo survey asking for topics that we have just done in the last year, or were doing the next month. It is frustrating to me when the only reason people aren’t coming is because they don’t know. Success looks like implementing a new system of marketing our events that works. What is that system? I don’t know.

2. I have had so many people tell me that they think NABIP is all about Medicare. Why? I’m not sure. We’ve always had luncheons dedicated to other products, and for a long time, we didn’t even include Medicare in those topics. I want to figure out a way to change that around so everyone remembers that NABIP Northern Nevada is an All-Products health insurance association.

ii. What is one measurable goal you want to achieve in your role this year?

1. I would like to see each luncheon have a minimum attendance of 30, meeting our minimum financial requirements.

2. I would like to continue to plan out luncheons several months in advance, and focus on topics that meet CE guidelines.

3. I would like to do a survey sent out to people who do not, or have not recently been attending the luncheons. I want honest feedback - is it the food? The programs? The advertising? The time of the month? We have so many people that used to come every single month that we almost

never see now.

4. I would like to begin introducing Speaker Thank You gifts - real gifts, not just candy. Speakers do an incredible amount of work for us, oftentimes HOURS of work, and it doesn't feel respectful to not show gratitude.

iii. Are there any outdated processes or traditions in your area that could use a refresh or rethinking? If not, what new processes need to be integrated into your role to improve it?

1. This is mainly the way that we advertise our events. Email blasts are just not working any more. I did try calendar invites for a while which got some response, but not a lot. I wish we could find a way to text.

iv. What support do you need from the board or other officers to achieve your goals?

1. I primarily need the board members to equally put in their part of the success of our events. I can do as much planning and priming with Julie Ann as possible, but I can't reach out to 100+ people every month to promote our events on my own. I board members to dedicate themselves to a call list and stay with it, 2-3 weeks PRIOR to the luncheon, not just the week before.

f. Goals of the Vice President of Professional Development, Julie Ann Evans entered into minutes.

i. Chapter Leadership Training.

1. To review the NABIP Professional Development Officer Guidebook and corresponding material related to the Professional Development position.
    a. This was completed on June 13, 2025.
2. To complete the Professional Development online training videos (09/08/23 & 08/10/20).
    a. This was completed on June 23, 2025

ii. Education / Programs -

1. To continue to organize and hold a monthly meeting to include the Programs Chair, the Vice President of Media &

Communications, the President, and any others who would like to attend.

a. These meetings are typically held on the fourth Friday of each month and are designed to create meaningful education opportunities for our local members.

b. The goal is to discuss and plan future events, topics of interest, and opportunities for CEs; as well as to help facilitate our programs schedule for several months in advance.

iii. i. This will require the support of the Programs Chair and our members as we seek ideas for topics that will encourage attendance at the monthly luncheons.

ii. This will also require support from the Vice President of Media & Communications and Kapsher Consulting to make sure the events are advertised timely.

iv. CE Submissions - To continue to work with the Programs Chair and the Symposium / Medicare Committee Chairs to facilitate timely submission of all necessary material to be reviewed for CE. To continue to complete all the necessary steps required to manage CEs and to do so in a timely manner.

1. This will require support from the Programs Chair, the Symposium / Medicare Committee Chairs, and those asked to present a CE course.

v. Education Foundation - To assist, if needed, the Education Foundation Chair in educating the public on healthcare and healthcare financing options.

1. This will require support from the Vice President of Media & Communications and Kapsher Consulting to make sure these options are communicated to our members and more importantly, to the public.

vi. Succession Planning - To increase the Professional Development committee to assist with the planning process for our monthly luncheons, events, etc. and to assist with the CE process.

1. This will require input from current board members to find people who are interested in joining the committee.

2. This will also require the creation of a policies and procedures manual that would outline, step-by-step, the processes involved in applying for and maintaining CEs for the chapter.
    a. The policies and procedures manual has been started and will be completed by August 31, 2025.

g. Goals of the incoming Vice President of Media and Communications, Don Goldmann entered into minutes.

i. In as much as I did not hold this position last year, the question of "what I wish I had done better" could not be answered. However, there are a number of items that I think would constitute success for me.

1. Success would look like timely newsletter distribution with as much pictorial material as possible since people love seeing themselves in newsletters.

    a. Timeliness would be to get the newsletter to Ashley in the next to last week of the month for the next month's publication.

    b. Timeliness would be to get the newsletter for the next month distributed at least one week prior to the upcoming membership luncheon program in order to encourage reservations for that month.

    c. Timeliness would be to coordinate with Ashley's workflow, Aliana's program timing and other board member's needs, if they are working on a project that could involve the newsletter.

2. Success would look like a wider distribution pattern for the newsletter.

    a. If the budget can afford it, the purchase of a broker's list that included non-members should be purchased and used each month in order to better promote the potential of non-members attending the luncheon programs and possibly becoming a member of the chapter.

    b. If it is possible to coordinate with Julie Ann and/or Aliana to send a copy of the newsletter to the speaker for the upcoming month and also send a copy of the newsletter that follows that speaker's presentation, then we should get those two copies emailed to the speakers as a "Thank You".

c. A copy of the monthly newsletter should be sent to the appropriate media as part of our media campaign, even if it never actually gets used.

d. Working with other board members with good relationships with Northern Nevada carriers, success would look like getting those carriers to do a mail out of our monthly newsletter to their broker base.

3. Success would look like member communications, when appropriate, being sent to that same non-member list proposed in 1) b, i.

4. Success would look like continually updating, with the help of Ashley and Dave, our chapter website.

5. Success would look like assisting to create an Annual Review of the Chapter's Success document for posting on the website to support the Pacesetter Award.

ii. One measurable goal I want to achieve in my role this year is to meet the success goals listed in item 1.

1. A second measurable goal would be to send out, at least, one media release a month throughout the year.

iii. Learning, and then taking advantage of the NABIP AI tools for media and chapter communications success, is a new process that needs to be integrated into my activities in my position, and it will refresh the entire output for the chapter.

iv. The support I need from the board and other officers to achieve my goals are specifically identified in items 1 through 3.

v. If other board officers want Media and Communications to promote and broadcast the work that they are doing for the chapter, I will need them to provide me adequate information and in a timely manner.

vi. I will welcome working with any of my fellow board members. Just ask!

h. Goals of the Vice President of Membership, Gina Aguerre. Added to the Addendum.

i. Goals of the Vice President of Awards, Ross Pendergraft entered into minutes.

i. Use Pacesetter award criteria as a guidebook for a successful chapter.

ii. Ross educated the meeting participates in the difference between leadership training and strategic planning

iii. Ross educated the meeting participants about the difference between a leadership training meeting, and a strategic planning meeting

iv. Ross educated the meeting participants about the value of using the Pacesetter award criteria as the best guidebook for building a successful chapter.

v. Ross reminded everyone that the excel spreadsheet of each area's responsibilities distributed at the leadership meeting would be used at each regular monthly board meeting to evaluate progress towards achieving the goals agreed upon at the strategic planning meeting.

j. Goals of the Vice President of Legislative Affairs, Mary Lou Boulton entered into minutes.

i. What is one measurable goal you want to achieve in your role this year?

1. I came in the position in 2024, which was in the year of no state in session. 2025 was very different – I had many more meetings and worked closely with Heidi Sterner – State Chair and Cindy Samuels Southern Nevada Leg chair. Once the state was in session, we reviewed bills and had many calls, then we had weekly calls with other NABIP members going over what was happening. Much more time needed to be allocated to what was happening.

2. Now we are going into a year with no session – should be relatively slow time wise. I have a region 8 monthly meeting to go over what is happening in our region and read many articles of what is happening legislatively at a national level. I try to include what is happening in Medicare, Individual and group.

3. I wish to have feedback on the group level – I'm not sure if enough is being reported and information is relevant because I do not sell med to large groups – I would like to know if more should be reported in this area or if there are sites I should be looking at for information.

4. I would like to work with Don with information for the newsletter – giving a legislative update on what is happening monthly, or every other month.

k. Goals of the Medicare Chair, Merre Gregory/Doug Boulton entered into minutes.

i. Merre Gregory

1. What did you wish had improved in your role last year (if applicable)? What would success look like this time around?

    a. This is an easy question on the surface, stay healthy so I can be involved more and have better input.

    b. My success would be, to be more helpful to the president, take calls and contacts off her plate for monthly presenters regarding Medicare topics. Become more familiar with current contacts and develop new contacts for Medicare updates. I would like to be more helpful for the annual expo to acquire speakers and make our expo an event that all members want to attend and bring in new members.

    c. Success would be to have my comments be as good as Don's and in an amazing format such as his.

2. What is one measurable goal you want to achieve in your role this year?

    a. At least one measurable goal would be to work more closely with Aliana to procure speakers for our monthly meetings, ensuring excellent information regarding current Medicare issues that we all feel need to be addressed. There should be a minimum of 3 Medicare Content luncheons during our board year. In addition, I would like to continue to make our yearly expo an event that everyone wants to attend and bring in more new members. I would like to entertain the idea of hosting a Medicare 101 training for new Medicare Agents.

3. Are there any outdated processes or traditions in your area that could use a refresh or rethinking? If not, what new processes need to be integrated into your role to improve it?

    a. I am not aware of any outdated processes/traditions. New processes I would like to integrate that would help me in my role would be to work closely with the State NABIP Medicare Chair Person. I would like to have a monthly meeting/discussion with them as well as our Medicare Co-Chair to discuss current issues. This would give a better sense of what is happening not just locally but state-wide.

4. What support do you need from the board or other officers to achieve your goals?

    a. I would like to work more closely with Mary Lou our Legislative Board Chair in conjunction with Heidi Steiner, to be more aware of bills that affect Medicare. I would send emails to our members when there are bills that we need to contact our congress and how to do so. This would help the members feel more involved in their NABIP chapter.

    b. I would like to have a monthly discussion with our President, Aliana, to offer ideas and learn what I can do better to help support our chapter.

    c. I would like all board members to be able to rely on me when they need help. We are all busy but I want all to know that I will step in when needed!!

ii. Doug Boulton

1. What did you wish had improved in your role last year (if applicable)? What would success look like this time around?

    a. Since I'm new to the role, I can't speak to last year. Success for me would mean creating stronger connections between NABIP and our members on Medicare issues, ensuring everyone feels informed and supported as they navigate changes in the Medicare landscape.

2. What is one measurable goal you want to achieve in your role this year?

    a. I'd love to boost member engagement with our Medicare content. Whether that's more people joining our webinars, responding to surveys, or feeling more confident about Medicare changes, I want our members to feel genuinely connected and supported.

3. Are there any outdated processes or traditions in your area that could use a refresh or rethinking? If not, what new processes need to be integrated into your role to improve it?

    a. I'm excited to take a fresh look at how we share Medicare updates with members. There's always room to improve how we connect with people and meet them where they are.

4. What support do you need from the board or other officers to achieve your goals?

    a. Most importantly, I'd like to collaborate with our communications team and receive guidance from experienced board members as I find my footing in this role.

l. Goals of the LPRT Chair, Joy Gardner: none

m. Goals of the incoming DEIB Chair, Adrienne Saintil entered into minutes.

i. What is one measurable goal you want to achieve in your role this year?

1. Connect with other members of the DEI chair for ideas, advice and education.

n. Goals of the incoming NABIP Education Foundation Chair, George Beach entered into minutes.

i. What did you wish had improved in your role last year (if applicable)? What would success look like this time around?

1. Brand new to the role.

ii. What is one measurable goal you want to achieve in your role this year?

        1. Maybe, I'll know after I get a better understanding of the role.

    iii. Are there any outdated processes or traditions in your area that could use a refresh or rethinking? If not, what new processes need to be integrated into your role to improve it?

        1. None.

    iv. What support do you need from the board or other officers to achieve your goals?

        1. A better understanding of the position and what's expected of what's expected of the role.

o. **Goals of the Director of NABIP Pac, Jay Eldridge: Absent no report.**

p. **Goals of the Immediate Past President, Molly Moreno entered into the minutes.**

    i. What did you wish had improved in your role last year (if applicable)? What would success look like this time around?

        1. When I initially committed to this position, I had more time and support from my company. Working in both Las Vegas and Reno and unexpected personal challenges, including a broken leg, impacted my ability to fully engage. This time around, success would mean being able to dedicate the time, focus and energy the role of president truly deserves.

    ii. What is one measurable goal you want to achieve in your role this year?

        1. One measurable goal I want to achieve this year is to attend at least %75 of the scheduled meetings,- both virtual and in person when travel to Las Vegas permits, and to actively offer support to my fellow board members as needed.

    iii. Are there any outdated processes or traditions in your area that could use a refresh or rethinking? If not, what new processes need to be integrated into your role to improve it?

        1. I believe the board has been open to adopting new processes. For example, moving the expo to a one day event and combining Group & Medicare. In the past these changes were met with resistance.

iv. What support do you need from the board or other officers to achieve your goals?

    1. I’ve felt fully supported by the entire board-it’s a truly collaborative and dedicated group.

11. Incoming President Aliana Rushing, wrapped up the meeting with a heartfelt lesson on the importance of being rooted, like red wood trees. Emphasizing the significance of holding each other up and being supportive so we can grow together.

12. A motion to adjourn was made by Don Goldmann and seconded by Julie Ann Evans. Unanimously approved.

13. Incoming President, Aliana Rushing, adjourned the meeting at 2:50 PM.

Report submitted by incoming Secretary, Chanté Padilla, June 27th, 2025.

CPadilla

Chanté Padilla

Addendum

Northern Nevada Chapter Mission and Vision Statements:

NABIP's Mission Statement

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

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.

Goals of the Vice President of Membership Gina Aguerre.

Goals:

What did you wish had gone better in your role last year (if applicable)? What would success look like this time around?

Last year was a bit of a blur. I had hoped we would grow and maintain our standing in the Medium Group category, but we hovered between Small and Medium throughout the year. Unfortunately, agency applications remained on hold nationally —with one exception (thank you, Bob Tretter).

Success this time around would be to firmly grow into and stay in the Medium Group. I'd like to bring in at least one additional group and improve our follow-up efforts to support retention and consistent engagement.

What is one measurable goal you want to achieve in your role this year?

Our Primary Goal: Membership Growth and Retention

This year marks our entry into the *Medium Group* category (100–149 members), with our current membership standing at 102. Our top priority is twofold:

1. **Growth** – Strategically expand our membership base in the medium category

Key Focus Areas:

- **Independent Agents**: We recognize the increasing challenges faced by independent agents. Our resources and support are more valuable than ever in helping them navigate industry changes. Continuing and expanding outreach to this group remains a critical component of our growth strategy.
- **Group Agency Engagement**: With the appointment of a new Membership *Co-Chair*, who works in the group industry, we anticipate a revitalized effort in this area. Our objective is to increase the number of agency memberships and restore the diversity of Group Agents participation within our organization.

2. Retention – Strengthen Our Standing in the Medium Group Segment

To maintain our momentum and solidify our place in the Medium Group category, I plan to reintroduce our **Mentor Program**. While the framework technically exists—where new members are paired with a mentor, typically their sponsor or referral—there is room for improvement in execution and follow-through.

Action Steps:

- **Revitalize Mentor Engagement**
  Implement a structured follow-up process to ensure mentors are actively connecting with their assigned new members.
- **Ensure Member Integration**
  Verify that new members:
  1. Have been personally invited to, and ideally have attended, a chapter meeting.
  2. Participate in the New Member Orientation session.
  3. Have successfully accessed their member portals, are receiving newsletters, and are engaged with NABIP communications.

By reinforcing these touchpoints, we aim to not only retain members but also foster deeper engagement early in their membership journey.

Are there any outdated processes or traditions in your area that could use a refresh or rethinking? If not, what new processes need to be integrated into your role to improve it?

You're asking the "old fart," but honestly—not really. The systems we have work *if* they're actually followed. When the procedures were consistently implemented, things ran smoothly. With some new energy on board this year, I'm hopeful we'll see more follow-through.

That said, a few practices that should be brought back:

- Personally call anyone behind on payments, either their sponsor or Joy should make the call. (add an exit interview, so we have the whys? documented
- Follow up with all guests who attend our luncheons.
- Bring back the membership table at monthly lunches and expos—it not only helps with registration but also boosts membership engagement.

It's less about reinventing the wheel and more about making sure we roll it forward.

What support do you need from the board or other officers to achieve your goals?

This is where we shine—we truly work well together as a team. Continued support with follow-up on delinquencies has always been helpful, and I'd appreciate keeping that going.

Depending on our outreach plan this year, I may need help with new agent follow-up. Since May alone, over 500 agents have gotten newly licensed or renewed—75 of them in the Reno area (non-NABIP members) . When I started, we'd email or call them, but the volume has become too large for one person. It might be time to rethink how we manage that outreach—possibly with shared responsibilities.

Also, more in-person board connection (when possible) could really strengthen our momentum. Other chapters schedule their monthly event calls immediately after board meetings. It builds both accountability and camaraderie—we might consider adopting that practice.

Let's turn this into a shared success story. Growing our organization starts with us—and when we support each other, we all benefit.

Term Dates:

July 1st, 2025 - June 30th, 2026

Signature, Date

Gina Espinal-Aguerre 6/21/25