



2023 Arizona Chapter Yearly Highlights

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Introduction

NABIP Arizona is a premier organization for health insurance agents, brokers, consultants, and benefits professionals. National Association of Benefits and Insurance Professionals (NABIP) is our national organization. As a subset of the national organization, our primary purpose is to provide education to those who want to excel in the healthcare industry.

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

Our Vision – NABIP Arizona 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.

Thank you for your time and dedication NABIP Arizona 2023-2024 Board of Directors:

Sheila Prior, President, *Cigna Healthcare*

Jessica Cheney, REBC, Immediate Past President, *Arcwood Benefits Consulting*

Alana Mayer, CEBS, Secretary, *Black, Gould & Associates*

Charlene Hogeland, Treasurer, *Black, Gould & Associates*

Scott Sandler, Legislative Chair, *Solstice Benefits*

Jenny Weaver, Membership Chair, *RTP Consultants*

Jessica Cheney, Professional Development Chair, *Arcwood Benefits Consulting*

Sabrina Teames, Membership Retention Chair, *Rogers Benefit Group*

Jolene Bryant, Awards Chair, *Columbia Benefit Solutions*

Chandler Chavez, Marketing & Communications Committee Chair, *Principal Financial Group*

Jennifer Farrell, NABIP PAC Chair, *Black, Gould & Associates*

Michael Bravo, LPRT Chair, *Bravo Insurance Solutions*

Netta Garcia, DEI&B Chair, *Magnuson & Associates*



Legislative

Arizona Department of Insurance and Financial Institutions (DIFI) was set to swear in the new Director Barbara Richardson, but that never happened due to an Executive Order from Governor Katie Hobbs and subsequently, none of the Director Nominations have been confirmed. Barbara Richardson is the Cabinet Executive Officer for DIFI.

Sheila Prior and Alana Mayer from the NABIP Arizona Board of Directors attended **The Hertel Report 2023 Winter State of the State** in Phoenix, Arizona.

Sheila Prior, Alana Mayer, Charlene Hogeland, and Scott Sandler from the NABIP Arizona Board of Directors attended **The Hertel Report 2023 Summer State of the State** in Flagstaff, Arizona.

The Hertel Report publishes a monthly newsletter featuring local and national healthcare news designed to keep readers informed on issues impacting Arizona's managed care industry. The Hertel Report hosts the State of the State breakfast meetings each year to discuss healthcare topics influencing managed care operations in Arizona. Attended by healthcare leaders from across the state, the event facilitates communication that offers fresh insight, solutions and opportunities for collaboration. www.thehertelreport.com

Sheila Prior attended the NABIP Colorado Day at the Capitol in Denver, Colorado on March 6, 2023. Both states are in Region 7 and collaboration across states to better support each other's legislative efforts is an area of focus.



NABIP Arizona received the award for Highest Percentage of Contributing Members (101-250) at the 2023 Capitol Conference.

NABIP Arizona received the award for Highest Percentage of Contributing Members (176+) at the 2023 Capitol Conference.

NABIP Region 7 received the award for Highest Percentage of Contributing Members at the 2023 Capitol Conference.

Debbie Lesko, House Representative (R-8th District) received distributions in Q1 2023.

17% of Members Contributing

NABIP PAC'S MISSION:
The purpose of the NABIP's Political Action Committee (NABIP PAC) is to raise funds from NABIP members for the purpose of supporting the political campaigns of candidates who believe in private sector solutions for the health and financial security of all Americans.

Membership

New members:

January: Garrett Griffin; Brandon William Krohm, CLMS; David William Weiner; Arren Asmus; Ingrid M. Pereda

February: Reid Nelson; Sharon Clemente; Benjamin Rosky

March: Kristin Dorn; Noreen Johnson

April: Steve Carson; Kirsten Meikle; Carrie L. Stockwell; Chris Ostrand; Christina Marie Eades; Leticia Reynoso-Monge; Drew Nelson; LaChelle Nelson Moser, RHU, REBC, CLTC, CSA; Kelly Raith; David Casanova

May: Anthony Kamson; Cheyana L. Tullgren; Joyce Coffaro; Alex Sarantis; Steve Cardinal; Sandra Lynne Hartman

June: Jacqueline Shelbourn; Craig Littleman; Douglas Peraza; Robert Scola; Kayla Flores; Jennifer Hagar; Kristi DeWitt; Stacey Grosshans; Beth Hammon; Jeff Wilkinson; Howard Coates

July: Jack Aubrey; Brian M. Kallemeyn

August: Patti Johnson; Patty Watters; Aaron Slegers; Daniel Rankin; Katie Brock, REBC; Omar Leon

September: Adam Lubenow

October: Kenneth Slaton; Alicia Rosenquist; Sally Ingram Coker; Craig Kober; Deanna Olson

November: Arthur C. Olson; Accai Bailey

December: Albert Ferrin; Nohemy Been; Debra Smith



Membership Retention

The average retention rate for 2023 is 72%.



Member Call Blitz

The NABIP Board of Directors also participated in an Active Member Call Blitz May 1, 2023 to engage with members and remind them of the value of their membership and participation in upcoming events.



Member Networking

NABIP Arizona coordinates monthly Networking Events across the state to bring together members to get to know each other and to recruit New Members to join.

Charitable Outreach

- Phoenix Police Foundation Honor Run March 22, 2023
- Advance Charity Partner at NABIP Annual Conference May 17, 2023
- Stocking Drive benefitting Stocking for Heroes November 9, 2023

All events posted on www.nabiparizona.org, LinkedIn and Facebook



Professional Development

NABIP Arizona hosted many meetings throughout the year.

- January: PEO 101 Presented by Justworks Virtual
- February: Dr. Christ, M.D., M.S. Virtual
- March: Tammy Halter, Mercer's Annual Employer Healthplan Survey Results
- April: Insurance Ethics Presented by Denisse Bravo Virtual;
Tammy Halter, Mercer's Annual Employer Healthplan Survey Results Virtual
- June: Dental Insurance Refresher Virtual
- September: CAA and Broker Compensation Transparency Regulations Virtual

Leading Producers Round Table

The LPRT program was designed to reward members who are outstanding producers. LPRT qualifiers receive several free or discounted educational offerings and other services.

Lifetime & Qualifying – Soaring Eagle

- Jerome T. Anderson, 26 years
- Tamara P. Kennedy, 18 years
- Raymond E. Magnuson, JD, CLU, ChFC, RHU, REBC, 12 years
- Peter L. Rowe, 11 years

Lifetime Emeritus

- Kristine M. Kassel, RHU, 20 years

Lifetime & Qualifying – President’s Council

- Roseanne Wolfe, RHU, REBC, 25 years



Soaring Eagle

- Lori Crandall, 7 years
- Peter L. Rowe, CLU, 7 years
- Jennifer Liane Farrell, 6 years
- Charlene M. Hogeland, REBC, LPRT, 6 years
- Debra Lee Landers, HIA, 1 year

Golden Eagle

- Catherine Barto, RHU, REBC, 4 years

Eagle

- Rebecca Ann Kanoza, RHU, REBC, 4 years
- Alana Marie Mayer, 1 year



Chapter Awards

NABIP Arizona was awarded the **Gold Certification** in NABIP's Chapter Certification Program. This is an ongoing program that recognizes excelling chapters throughout the calendar year. "The leadership of NABIP members has a far-reaching impact on providing for the healthcare needs of individuals, families and business in their communities. We are grateful for Arizona's hard work with chapter development and recognize them for their efforts with this well-deserved award." said NABIP CEO Jessica Brooks-Woods.



The Landmark Award honors state chapters for outstanding achievements and excellence in service to their members, the industry and the public.

Landmark Awards will be presented to the top 50% of the highest scoring chapters in the following chapter membership size categories (the size categories are based on the April membership reports):

Tiny = 1 to 100 members; Small = 101 to 250 members; Medium = 251 to 500 members; and, Large = 500+ members.

NABIP Arizona
receives
2023 Landmark
Award

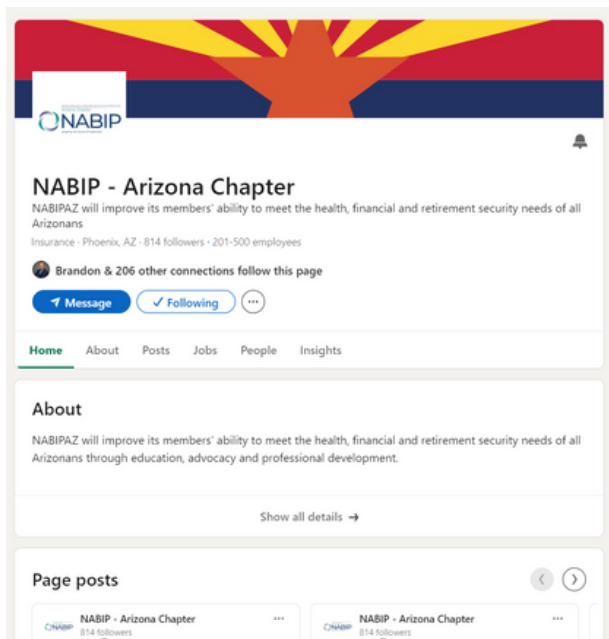
Marketing & Communications

Social media

- Facebook: 64 followers, 42 Likes, 460 page reach
- Twitter: 32 followers
- LinkedIn: 814 followers, 42 new followers

Press hits

- Phoenix Business Journal Book of Lists: Largest Phoenix-Area Professional Associations Ranking 15 (June 23, 2023)
- Phoenix Business Journal Book of Lists: Largest Phoenix-Area Networking Associations Ranking 14 (June 9, 2023)



Meetings - Events

Monthly Board Meetings held the 2nd Wednesday of each month virtually (excluding July and December months)

- 2023 Annual Conference & Golf Tournament May 17-19, 2023
- Strategic Planning Meeting June 21, 2023
- Freshman Orientation August 23, 2023
- NABIP Bowling Day September 14, 2023
- NABIP Arizona + Board of Trustees Cocktails & Conversation September 29, 2023



Networking Happy Hours

March 8, 2023 at Postinos Arcadia - 7 attendees
March 23, 2023 at Postinos Tucson - 17 attendees
April 13, 2023 at Mother Road Flagstaff - 13 attendees
August 4, 2023 at The Monica Tucson - 27 attendees
November 9, 2023 at The Social on 83rd- 22 attendees



Sponsors

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