



NABIP Arizona Strategic Plan (2025–2026)

I. Executive Summary

The 2025–2026 Strategic Plan outlines NABIP Arizona’s commitment to strengthening chapter performance, enhancing member engagement, and advancing advocacy efforts. Under the leadership of President **Alana Mayer**, the organization will focus on achieving national recognition, growing membership, and delivering high-impact programming aligned with NABIP’s mission.

II. Mission Alignment

NABIP Arizona is dedicated to:

- Advocating for insurance professionals and consumers
 - Promoting professional development and ethical standards
 - Strengthening the voice of brokers in Arizona
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III. Strategic Priorities

1. Chapter Excellence & Governance

Goal: Achieve and maintain **Gold Status Chapter Certification**

Key Initiatives:

- Ensure compliance with all NABIP national requirements
- Execute all presidential duties in alignment with NABIP bylaws
- Attend and actively participate in monthly regional meetings
- Maintain strong governance and operational oversight

Success Metrics:

- Gold Status Certification achieved
 - 100% participation in required national meetings
 - Board accountability to roles and responsibilities
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2. Leadership Development & Succession Planning

Goal: Build a sustainable leadership pipeline for future board terms

Key Initiatives:

- Support President through collaboration with President-Elect and Immediate Past President
- Actively recruit board members for the **2026–2027 term**
- Develop onboarding and mentorship processes for new leaders

Success Metrics:

- Full board slate identified prior to next term
 - Increased engagement of emerging leaders
 - Smooth leadership transition year-over-year
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3. Membership Growth & Engagement

Goal: Expand and retain a strong, active membership base

Key Initiatives (Membership Committee):

- Develop targeted recruitment campaigns
- Improve member onboarding experience
- Increase retention through engagement and value-driven programming

Success Metrics:

- Year-over-year membership growth
- Improved retention rates

- Increased event attendance and participation
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4. Legislative Advocacy

Goal: Strengthen NABIP AZ's influence in legislative and regulatory matters

Key Initiatives (Legislative Committee):

- Monitor and respond to state and federal policy developments
- Engage members in advocacy efforts
- Strengthen relationships with policymakers

Success Metrics:

- Increased member participation in advocacy events
 - Strong representation at Capitol Conference
 - Measurable legislative impact and visibility
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5. Professional Development

Goal: Deliver high-quality educational opportunities to members

Key Initiatives (Professional Development Committee):

- Host educational events, webinars, and CE opportunities
- Provide relevant industry insights and training
- Partner with carriers and industry experts

Success Metrics:

- Number of CE credits offered
 - Attendance at educational events
 - Positive feedback from members
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6. Events, Recognition & Awards

Goal: Celebrate member achievements and enhance engagement

Key Initiatives (Awards Committee):

- Execute annual awards program
- Recognize member and industry excellence
- Align awards with engagement and performance metrics

Success Metrics:

- Increased award nominations
 - Strong participation in recognition programs
 - Positive member feedback
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7. Communications & Brand Presence

Goal: Strengthen NABIP AZ's visibility and communication strategy

Key Initiatives (Media Committee):

- Enhance digital and social media presence
- Promote events, advocacy, and member value
- Ensure consistent messaging and branding

Success Metrics:

- Growth in social media engagement
 - Increased email open and click rates
 - Stronger brand recognition across Arizona
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8. Political Action Committee (PAC) Growth

Goal: Increase PAC engagement and contributions

Key Initiatives (PAC Committee):

- Educating members on the importance of PAC
- Increase participation and donations
- Align PAC efforts with advocacy goals

Success Metrics:

- Increased PAC contributions
 - Higher member participation rates
 - Stronger legislative influence
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9. Diversity, Equity & Inclusion (DEI)

Goal: Foster an inclusive and representative professional community

Key Initiatives (DEI Committee):

- Promote diversity within membership and leadership
- Ensure inclusive programming and outreach
- Support initiatives that reflect Arizona's diverse population

Success Metrics:

- Increased diversity in membership and leadership
 - Inclusive representation across events and initiatives
 - Positive member feedback on inclusivity efforts
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IV. Leadership Structure (2025–2026)

- **President:** Alana Mayer
- **President-Elect:** Charlene Hogeland
- **Immediate Past President:** Sheila Prior
- **Treasurer/Secretary:** Phillip Magnuson

Committee Chairs:

- Legislative: Jennifer Farrell & Rory Stone-Walsh
- Membership: Jessica Cheney & Morgan Whitaker
- Professional Development: Maddy Robinson & Patti Johnson
- Awards: Sarah Gollwitzer

- Media: Jenny Weaver
 - PAC: Pete Rowe
 - DEI: Netta Garcia
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V. Implementation & Accountability

- Monthly board meetings to track progress
 - Committee-level reporting on strategic goals
 - Mid-year and year-end performance reviews
 - Alignment with NABIP National benchmarks
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VI. Conclusion

The 2025–2026 Strategic Plan positions NABIP Arizona for continued growth, leadership development, and industry impact. Through strong governance, engaged membership, and focused advocacy, the chapter will elevate its presence and deliver meaningful value to its members and the broader insurance community.