

CAHIP-IE Board of Directors Meeting		
8.4.2026	11:00am to 12:30pm	IN PERSON @ HRBC & Zoom
Meeting called to order	Cherie Powell	
Invocation given by		
Roll Call	Kristie Scavarda	
Approval of Minutes		
Treasurer's Report	Christina Garcia	
President's Report	Introduce Craig Gussin/CAHIP President - Cherie Powell	
Voting Items	2026-2027 Proposed Budget	
Old Business	- Recap of 2026 NABIP Convention Cherie R. & Alanda D - BOD Picnic – Saturday, August 15th @ Henry's House	
New Business	Volunteers for Senior Summit	
President-Elect	Brandi Potlongo	
Membership/Retention	Alanda Dyer Donna Poole	
Professional Development	Diane Barrera	
Leg Report	Ashley Ingram	
PAC Report	David Johnston	
Communications Report	Brandi Potlongo	
Awards	OPEN	
Community Service	Kristie Scavarda	
Medicare Report	Yolanda Webb Henry Romero	
Hospitality Committee	Alanda Dyer	
2027 Golf Committee	Henry Romero	
2027 Symposium Committee	Brandi Potlongo	

CALENDAR OF EVENTS		
August 2026	September 2026	October 2026
4 th Monthly BOD Meeting	1-3 Senior Summit Riverside	6 th Monthly BOD Meeting
15 th BOD Summer Picnic @ Henry's	8 th Monthly BOD Meeting	15 th Monthly Chapter Meeting
16-18 Region 8 Leadership Meeting San Francisco	18 th PD Committee Zoom Mtg	23 rd PD Committee Zoom Mtg
21 st PD Committee Zoom Mtg	DARK – Monthly Chapter Meeting	

ADDITIONAL NOTES



CAHIP-IE Board of Directors Monthly Meeting Minutes

June 2, 2026

CAHIP-IE Board of Directors – Roll Call

Board Position	BOD Member	Attended	Excused	Absent
President	Cherie Powell	In Person		
Co-President	Shelley Hoover		X	
President Elect	N/A			
Secretary	Lisa Woods	Zoom		
Treasurer	Christina Garcia	Zoom		
Executive Director	Dawn Carroll	In Person		
Membership/Retention	Maura Zamarripa		X	
Professional Development	Diane Barerra	Zoom		
Legislation	Ashley Ingram	Zoom		
PAC	David Johnston	In Person		
Awards	OPEN			
Communications	Brandi Potlongo	In Person		
Medicare	Yolanda Webb	In Person		
Medicare Co-Chair	Henry Romero	In Person		
Hospitality	Alanda Dyer	In Person		
Community Service	Kristie Scavarda	Zoom		
Golf Tournament	Henry Romero	In Person		
Member at Large	Donna Poole	Zoom		

Meeting Adjourned @ 12:32pm

Meeting summary

Quick recap

The board meeting focused on reviewing the recent symposium event, which had 203 total attendees with positive feedback and three new members recruited. Cherie praised the event's success in reversing a downward trend in energy and engagement, though she noted some challenges with disruptive vendors and panelists reading from notes during presentations.

The chapter was recertified as a Gold Seal chapter, and the board discussed upcoming events including the July 16th Strategic Planning Meeting and August 15th Board Recognition Picnic.

Membership and retention were highlighted as areas needing improvement, with plans to contact other chapters for best practices and to implement better follow-up systems for new members.

The meeting also covered updates on the golf tournament needing more registrations to meet financial objectives, legislative priorities including non-discrimination bills and prescription drug coverage, and ongoing challenges with PAC contributions from members.

Next steps

Alanda

- [Contact LA and Orange County Membership Chairs to learn best practices for membership growth and retention](#)

Ashley

- [Continue to promote and monitor registration for June 11th webinar; keep board updated on numbers](#)
- [Continue securing speakers for October 15th in-person event \(specifically speaker on HSAs\)](#)

Dawn

- [Post symposium survey one more time and offer chance to win free registration for next year's symposium](#)
- [Add Alanda and Donna to NABIP/e-commerce system access for membership reports and schedule training](#)
- [Set up training for Alanda and Donna on using membership system reports](#)
- [Ratify board slate and send to membership for approval after board vote](#)

Henry

- [Send out current list of golf tournament registrants to board members by end of day](#)
- [Compare current member list with old DOI list to identify potential new members](#)

Lisa

- [Finalize and organize auction/gift items and gift certificates for golf tournament](#)
- [Prepare raffle and auction items for golf tournament \(31 raffle items, 8 live auction items\)](#)

Collaboration

- [All board members: Reach out to personal contacts and designated members to recruit additional golfers and promote sip & paint, final push by end of Thursday](#)
- [All volunteers: Arrive at 7:00 AM on Monday for golf tournament setup](#)
- [Professional Development Team: Work on securing location for February 18th event and update Dawn](#)
- [David: Begin outreach to lapsed PAC contributors and review current contributor list for follow-up](#)
- [All board members: Submit potential new board member bios and headshots to Dawn by third week of June](#)
- [All board members: Mark calendars and plan for July 16th Strategic Planning Meeting at HRBC 10-12](#)
- [All board members: Continue promoting membership value and follow up with new members per symposium list](#)

Summary

The chapter achieved NABIP gold seal recertification status. The board approved the Minutes and Treasurer's reports and discussed plans for a board recognition event on August 15th.

Symposium Review

The board meeting focused on reviewing the recent symposium event, which had 203 total attendees with positive feedback and three new members recruited. Cherie praised the event's success.

Golf Tournament and Raffle & Auction Preparations

The meeting also covered the upcoming golf tournament, which currently has 71 registered players, with Henry requesting board members to reach out to their contacts to increase participation before the Thursday deadline.

Dawn and Lisa discussed preparations for an upcoming event, including 31 raffle items and 8 live auction items, including a helicopter ride donation. They confirmed arrangements for tickets and gift certificates, with Lisa preparing black bags to hold the tickets.

June 8th Chapter Webinar & Membership Challenges

Dawn discussed registration numbers for the June webinar, with 3 people currently registered. They reviewed upcoming events including a Strategic Planning Meeting on July 16th and a Board Summer Picnic. The team discussed membership challenges, noting they currently have around 120

members compared to a historical high of 200 members, and Alanda planned to reach out to LA and Orange County membership chairs for best practices.

Member Engagement and Retention Strategies

Dawn and Donna discussed strategies for improving member engagement and retention, including collecting business cards at events and using the NABIP system for tracking membership reports. Dawn planned to add Donna and Alanda to the e-Commerce system for access to membership reports and scheduled training for them on using the system effectively. The discussion also touched on targeting Orange County's insurance brokerage market for membership growth and exploring retention strategies used by other chapters, particularly Barbara Ciudad's approach.

Healthcare Legislation and Upcoming Chapter Meetings

Dawn and Ashley discussed upcoming professional development meetings, confirming that the next in-person chapter meeting will be on October 15th, 2026. The February 18th, 2027, Speed Networking event will be reserved with the Goeske Center and plan B will be the Riverside Community Hospital.

Ashley provided a legislative update on several healthcare bills, including AB1876 on non-discrimination, AB1887 on prescription drug coverage for rare diseases, and AB2066 on pregnancy as a qualified enrollment event, with CAHIP continuing to monitor these bills for potential impacts on plan administration and costs.

Membership and Outreach Strategy Discussion

The board discussed membership challenges and strategies for expanding outreach beyond the Inland Empire Region. Dawn and Ashley expressed concerns about the high cost of vendor tables at events like the Medicarian event in Vegas, which can cost \$5,000-7,000, though they noted the event attracts 5,000 attendees.

The group explored the possibility of obtaining the Department of Insurance agents list, which would cost approximately \$15,000, though they noted this expense has been a barrier in the past and would require collaboration across chapters. David reported ongoing challenges with PAC (Political Action Committee) membership, noting that while membership costs are increasing, current members are already struggling with regular membership fees. The board also discussed upcoming political races and their potential impact on healthcare, particularly regarding Tom Slater's position on single payer healthcare and the potential for Xavier Becerra to step down due to federal investigations.

June 2, 2026 Chapter Leg Report – Ashley Ingram

CAHIP-IE Legislative Report – June 2026

Since our April Priority Bill Report, several health care bills have continued to advance through the Legislature and may have a significant impact on health plans, employers, agents, and consumers. The most notable activity has been on AB 1876, AB 1887, and AB 2066.

AB 1876 – Health Care Coverage: Nondiscrimination remains one of the most active bills. It would expand nondiscrimination protections by prohibiting health plans and insurers from denying coverage, benefits, or participation based on factors including sex, gender identity, pregnancy, disability, race, and national origin. The bill has passed the Assembly and is now moving through the Senate. CAHIP continues to monitor potential impacts on plan administration, compliance requirements, and benefit design.

AB 1887 – Prescription Drug Coverage for Rare Diseases has also advanced significantly. The bill would limit the use of step therapy and utilization management for certain rare disease treatments prescribed by specialists. While the goal is to improve patient access to necessary medications, CAHIP remains concerned about the long-term impact on affordability, utilization management, and premium costs, particularly for high-cost specialty drugs.

AB 2066 – Triggering Event: Pregnancy would establish pregnancy as a qualifying life event allowing individuals to enroll in or change health coverage outside of the normal enrollment period. While CAHIP supports expanding access to care, we continue to evaluate concerns regarding adverse selection and the potential impact on market stability and affordability.

We are also closely monitoring several additional bills involving mandated coverage for Alzheimer's treatments, hepatitis C therapies, obesity medications, lung cancer diagnostics, and expanded Medi-Cal access. While many of these proposals are intended to improve access to care, they may also contribute to increased health care costs and premium pressure for employers and consumers.

Finally, CAHIP remains opposed to **AB 1900, the CalCare single-payer proposal**, due to concerns regarding consumer choice, disruption to existing coverage arrangements, and the elimination of the agent and broker role in helping consumers navigate their health care options.

We will continue to monitor these measures closely and provide updates as bills move through committee hearings and fiscal review.

07/31/26

INLAND EMPIRE ASSOC HEALTH UNDERWRITERS INC

Balance Sheet Comparison

As of July 31, 2026

	Jul 31, 26	Jul 31, 25
ASSETS		
Current Assets		
Checking/Savings		
105 Banc of California	43,560	62,675
Total Checking/Savings	43,560	62,675
Total Current Assets	43,560	62,675
Other Assets		
130 Acct Rec.	4,000	0
Total Other Assets	4,000	0
TOTAL ASSETS	47,560	62,675
LIABILITIES & EQUITY		
Liabilities		
Current Liabilities		
Other Current Liabilities		
205 Prepaid Income	0	0
Total Other Current Liabilities	0	0
Total Current Liabilities	0	0
Total Liabilities	0	0
Equity		
Retained Earnings	57,801	55,573
Net Income	-10,240	7,101
Total Equity	47,560	62,675
TOTAL LIABILITIES & EQUITY	47,560	62,675