



## **NABIP Utah Board Meeting Minutes – Strategic Planning Meeting**

March 6th, 2024 9:00AM – 9:30AM

**Attendees:** Nicole Kuhni, Lynn Strate, Kortnie Lawrence, Erick Kuhni, Dawnann Baldwin, Jon Clark, Charlie Briggs, Roya Heldlund, Bryce Goodman (via: phone) Not in attendance: Josh Schreiber, Spence Hebdon

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### President Chairs:

-President's Side topics: training and review on how to use the NABIP Website. Where to find member access, how to locate trainings for chapter chairs, education foundation, Triple Crown and LPRT recognition, and how to donate to National PAC.

-PAC (Jon Clark): Reviewed goals set in 2023. Currently working to: rebuild, bringing awareness to PAC purpose, contacting current members to discuss PAC donations, removing non-members, finalizing the move to Quickbooks, adding a QR code to donation forms for easier donations. Discussed support for National PAC, current donations and future goals.

-Legislation (Erick Kuhni): Reviewed goals set in 2023. Success in NABIP Utah transparency goals. Newsletter: Legislation Hot Topics. Discussed NABIP Utah's involvement in 4 major bills.

- Telemedicine bill - NABIP opposed, bill failed
- SB:152 Accumulator bill – NABIP opposed, bill failed
- House bill (Norm Thurston) – NABIP supported, bill failed
- Bonded insurance companies – NABIP supported, bill passed

### Secretaries Chairs:

-Media Relations (Matthew Wells): NABIP Utah unable to receive recognition in local newspaper outlets. Social Media increased outreach goal reached. Continuing efforts to connect with local media outlets. Kelly's list is unhelpful in that none of these contacts are willing to work with NABIP UT

-Membership (Charlie Briggs): Utah chapter membership dropped in 2023. We had 223 in July of 2023, as of Gain report in January, Utah has 209. We are recognizing new members on LinkedIn and Facebook but are aware that we need to do more to grow our membership by adding and discussing values of being a member. We are gaining new membership, current members not renewing. Discussed member losses and accuracy to determine if members quit rather than retired from the industry. Members joining with an agency rather than individually. Newsletter recognition for long term members, Pearls of Wisdom. We do have certificates for membership to be given out at Sales Congress signed by Jon Pike.

### Treasurers Chairs:

-Professional Development (Bart Spencer): Success in promoting CE's via social media outlets. Working on new CE topics and presenters, open to new CE topic and what is wanted from the brokers. Regional CE are a success however we are finding it difficult to get cross state approve in Utah.

-Public Service (DawnAnn Baldwin): Success with fall 2023 charity event at the Christmas BoxHouse. Upcoming charity event planned for the spring: Tiny Tims wooden toys for children. Dawnann is working on a date and time

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Old Parking Lot:

- Virtual Chapter – Future plans
- Increase attendance at DOH – Yes
- Increased attendance at CAPCON - Yes
- Review mission statement - Yes
- Review vision statement – Working on
- Update Bylaws – These are good for now. Will revisit in 2025
- Create Policies & Procedures – Working on
- Generate more content/New CE Instructor's - Yes
- NABIP Mobile App – Future plans
- Convert CAP donations to digital - Yes

Continued Parking Lot:

- NABIP Mobile App (we feel this is more of a national concern)
- Mission Statement
- P&P