

# Newsletter



## *Who we are!*

NABIP OKC is a non-profit organization dedicated to serving the public by promoting the activities and ethical conduct of insurance professionals through communication, continuing education and increasing industry knowledge and influencing legislation.

## *Monthly Membership Meeting*

The NABIP Oklahoma City Chapter holds its monthly membership meetings on the second Thursday of each month. These gatherings typically include opportunities for continuing education (CE) credits and provide a valuable forum for networking and professional development within the health insurance and benefits industry.

## **NABIP Annual Convention**

The NABIP Annual Convention is the premier national event for health insurance professionals, taking place June 28–July 1, 2025, at the Fontainebleau Miami Beach. It features keynote speakers, breakout sessions, networking events, and the prestigious Harold R. Gordon Awards Gala. Attendees can earn continuing education credits, engage with industry leaders, and participate in governance through the House of Delegates.

# LETTER FROM THE PRESIDENT



If April showers bring May flowers, I'm excited to see all the blooming beauty just around the corner! Although my allergies are in full swing, the changing seasons always inspire optimism and new opportunities.

I'm so proud of the collaboration of our state chapters for hosting the inaugural Future Leaders Summit, focused on expanding diversity in our industry and evolving into a full educational career fair. Special thanks to our DEI Chair, Jimmy Jenkins, and to James Ashford for their outstanding leadership. If you haven't yet, be sure to read about them in the spring edition of BIP! While attendance was modest, the insightful feedback and observations we gathered will help make next year's event even bigger and better. We're thrilled that chapters nationwide are reaching out to NABIP for event information!

May promises to fly by in a whirlwind of activity — from proms and graduations to Mother's Day, Memorial Day, and everything in between. Be sure to save the date for our next chapter meeting: Thursday, May 8th at The Greens. We will earn an hour of CE credit while increasing our security posture by diving into the latest cybersecurity topics.

As we look ahead, June will mark the close of our board year and the exciting induction of our new leadership team. I cannot wait to see the incredible things they'll accomplish! Mark your calendars, and be sure to reach out to any board member about joining a committee!

Be sure you have a place to safe shelter during May's literal whirlwind, and remember, without rain, there would be no rainbows.

Be well!

Jodi Cooper  
President, NABIP Oklahoma City

**MARK YOUR CALENDAR!**

# UPCOMING EVENTS

## Monthly Meetings:

We are back to our regular Monthly Membership Meetings. We will resume our Monthly Membership Meetings starting May 8<sup>th</sup> 2025. Click [here](#) to register!

## CYBER SECURITY THREATS

Come listen to real life stories and examples of cyber threats and how it can impact your business. Andy Bigbie will give us informative, practical advice to handle this growing threat. You'll leave with a renewed sense of protecting your assets!



### SNEAK PEEK

May 8th - Monthly Membership Meeting!

June 28th - [Annual Convention in Miami, Florida](#)



### MEMBERSHIP

For more information on how to become a member or an Annual Partner you can visit our website for details!

Click here for: [Membership](#)

Click here for: [Annual Partner](#)

## MEET OUR CE PRESENTER

Andy Bigbie is a Strategist and Partner at Clevyr, a technology company based in Oklahoma City. With over 25 years of experience in business and technology, Andy has worked across a variety of industries including employee benefits, insurance, and software development.



Throughout his career, Andy has helped build and lead businesses focused on solving complex challenges with practical solutions. At Clevyr, he works with clients to improve processes, strengthen cybersecurity, and bring innovative ideas to life.

He enjoys helping teams and organizations make smarter decisions, and believes the right combination of people, tools, and thinking can make a meaningful difference.

<https://nabipoklahomacity.org/meetinginfo.php?id=130>

# UPCOMING AWARDS

## OKC PERSON OF THE YEAR AWARD

**Deadline to nominate is May 1st - Click [here](#) to find the form!**

The NABIP Oklahoma City Person of the Year award is a prestigious recognition presented by the National Association of Benefits and Insurance Professionals (NABIP) Oklahoma City chapter. This award honors individuals who have demonstrated exceptional dedication and service to NABIP at the local, state, regional, and/or national levels.

### Eligibility Criteria:

- Nominees must be active members of the NABIP Oklahoma City chapter.
- They should have served as a chair or committee member within the organization.
- The award can be bestowed upon an individual only once every five years.
- Nominations must be submitted by fellow NABIP OKC members.

The selection process evaluates the nominee's contributions to the association, including leadership roles, participation in initiatives, and efforts to advance NABIP's mission. The award serves to acknowledge and celebrate the commitment of members who go above and beyond in their roles.

For instance, Theresa Clagg was honored with the NABIP OKC Person of the Year award for the 2023–2024 term, recognizing her outstanding contributions to the organization. [LinkedIn](#)

Nominations for the award are typically due by May 1st each year. Interested members can access the nomination form and additional details on the NABIP Oklahoma City website's Awards section.



# NABIP PAC

**The NABIP PAC (National Association of Benefits and Insurance Professionals Political Action Committee) is a bipartisan fundraising and advocacy organization that supports congressional candidates who align with NABIP's mission to advance sound health policy. Funded by voluntary contributions from NABIP members, the PAC works to influence legislation that impacts health insurance professionals, brokers, and consumers. By engaging with policymakers, NABIP PAC ensures that the voices of industry professionals are heard in shaping healthcare regulations and policies that promote market stability and consumer choice.**

**Donating to both the NABIP PAC and the local PAC is essential for protecting and advancing the interests of health insurance professionals at all levels of government. The NABIP PAC supports congressional candidates who advocate for fair and effective healthcare policies, ensuring that lawmakers in Washington, D.C., understand the challenges faced by brokers, agents, and consumers. Meanwhile, the local PAC focuses on state and local legislation, where critical decisions on licensing, state-based exchanges, Medicaid expansion, and insurance regulations are made. By contributing to both, donors help strengthen the industry's voice, influence policies that promote market stability and affordable healthcare options, and safeguard their profession from harmful legislation. Without financial support, key decisions affecting the industry could be made without input from those who know it best.**




# Impact & Influence: Advancing Our Mission

2024 Quarterly Report – Q4

**At the National Association of Benefits and Insurance Professionals (NABIP)**, we continue to amplify the collective voice of brokers, advisors, and consultants to strengthen and improve the healthcare system. Through strategic collaboration and a shared commitment to excellence, NABIP members—representing large firms, small businesses, individuals, and families—are at the forefront of discussions and solutions surrounding benefits management, employee retention, and healthcare costs.

**Together, we are driving meaningful change.**

This Q4 Quarterly Report highlights NABIP's impact across three key KPI's:

-  **Operational Excellence** – Strengthening internal processes and member engagement
-  **Financial Vitality** – Expanding resources and partnerships to ensure sustainability
-  **Influence & Impact** – Advancing advocacy efforts and increasing public awareness

As we close out 2024, NABIP remains steadfast in its mission to empower agents and brokers with the tools, knowledge, and advocacy necessary to serve consumers effectively. Our collective efforts this quarter have reinforced our leadership in the industry and set the stage for continued progress in 2025.

# YOUR VOICE. YOUR IMPACT. YOUR NABIP.

As we close out 2024, I want to celebrate the incredible strides we've made together. From key legislative wins to enhancing our Medicare certification and strengthening industry partnerships, NABIP has remained laser-focused on delivering real value to you—our members.

## Thanks to your support, we've:

- Reduced compliance burdens for employers
- Expanded agent and broker training
- Strengthened our influence in healthcare policy
- Amplified NABIP's reach and impact

Looking ahead to 2025, we remain committed to protecting your profession, amplifying your voice, and providing the tools you need to thrive. But NABIP's success starts with you.

## Here's how you can take action:

- **Stay Informed** – Follow NABIP's newsletters and social media.
- **Get Engaged** – Join advocacy efforts, trainings, or local events.
- **Grow Your Influence** – Advance with NABIP's education programs.
- **Support the Cause** – Strengthen NABIP's impact by contributing to NABIP PAC.

Take action today—recruit new members, share NABIP's advocacy, and help amplify the voice of agents and brokers. Visit [brokersmakingadifference.org](https://brokersmakingadifference.org).



Thank you for your dedication—I'm proud to stand with you.

Jessica Brooks-Woods  
CEO, NABIP

## OPERATIONAL EXCELLENCE

### PROFESSIONAL DEVELOPMENT & EDUCATION

#### LMS Launch: [nabiptraining.org](https://nabiptraining.org)

NABIP launched its new Learning Management System (LMS), [nabiptraining.org](https://nabiptraining.org), offering a streamlined interface, interactive content, and enhanced CE credit tracking. This upgrade improves the student experience and reinforces NABIP's commitment to professional development.

#### Medicare Certification Growth

**NABIP welcomed 2,060 new Medicare registrants in Q4**, reflecting the value of its certification program and the success of outreach efforts, solidifying its leadership in Medicare training.

#### Expanding Partnerships and Outreach

- **New Partnerships:** Finalized a collaboration with DC Health Link to host its Marketplace certification program, with efforts underway to create similar state partnerships.
- **Leadership Development:** Partnered with educational providers to deliver training on fiduciary responsibilities, group, and individual sales growth.
- **Cybersecurity Taskforce:** Board-approved initiative to address industry-specific cybersecurity needs, emphasizing NABIP's proactive leadership in this critical area.


### MEMBERSHIP

#### NABIP continues to enhance membership services and engagement:

- **Database Migration:** The new Member Database System launches in Q1 2025, starting with new enrollments, followed by renewals, Corporate Partners, and Agency Dues Model participants, ensuring a smooth transition.
- **2025 Agency Dues Model:** Relaunching in February with a 3% average monthly increase, maintaining current categories with clear member guidance.
- **International Growth:** NABIP welcomed Costa Rica Chamber of Commerce members into eight chapters, expanding global influence and promoting medical tourism.
- **BenefitPitch Partnership:** A soft launch in eight chapters will introduce members to this innovative benefits platform, gathering feedback to enhance engagement.
- **Marketing Updates:** Modernized materials will debut in early 2025 to strengthen outreach and member communication.

This quarter's efforts reflect NABIP's continued commitment to improving member experiences, expanding international influence, and leveraging innovative solutions to meet the evolving needs of our members.

## Strategic Partnerships

 **Renewals:** Extended partnerships with Medicarians, BenefitsPRO, Nonstop Health, CalSurance, Lead Marvels and AgencyBloc.

## Infrastructure & Technology Investments





 **Financial Commitment:** Investing in critical infrastructure and technology upgrades across the organization.

# INFLUENCE & IMPACT

## GOVERNMENT RELATIONS & ADVOCACY

### Legislation Passed: Employer Reporting




After years of advocacy, NABIP successfully secured updates to ACA employer reporting under Sections 6055 and 6056, reducing burdens and costs for businesses:

-  **Simplified Reporting:** Less documentation eases administration.
-  **Dependent SSN Elimination:** No longer required, improving privacy.
-  **Extended Response Times:** More time for large employers to address IRS notices.
-  **Limited Lookback Period:** Shorter IRS compliance checks reduce audit exposure.

This win provides significant relief, especially for small and mid-sized businesses, while ensuring ACA compliance.






### Medicare Advocacy and Outreach

NABIP continues to champion Medicare beneficiaries and agents with these key Q4 initiatives:

-  **AEP National Town Hall:** A live virtual forum engaged members, addressed challenges, and gathered advocacy insights.
-  **New Medicare Talking Points:** Resources to help agents advocate for beneficiaries and highlight brokers' year-round value.
-  **Survey Insights:** Collected more than 10,000 responses from beneficiaries and agents showcasing brokers' essential role and policy impacts.

### Key Meetings, Coalition Building and Legislative Advocacy

NABIP leadership advanced critical healthcare priorities through strategic meetings and coalition efforts:

-  **Telehealth Advocacy:** Collaborated with House leaders to push for telehealth reauthorization, with efforts continuing into the new session.
-  **Medicare Policies:** Engaged Senate Finance Committee staff to improve Medicare policies, leveraging agent insights to enhance beneficiary outcomes.
-  **Direct Primary Care & HSAs:** Advocated for aligning primary care models with HSA eligibility.
-  **PBM Reform:** Supported increased transparency and accountability in pharmacy benefit management.
-  **Coalition Building:** Strengthened partnerships with industry leaders to amplify advocacy efforts.

These initiatives highlight NABIP's commitment to advancing healthcare policy and delivering meaningful impact for members and the broader healthcare community.

## STATE ADVOCACY UPDATE:

**HB 2375, a NABIP-drafted model bill**, advanced out of committee in Virginia. In partnership with Delegate Mark Sickles and the NABIP Virginia Chapter, the legislation increases transparency and accountability for pharmacy services administrative organizations (PSAOs) to help lower prescription drug costs and improve affordability, reinforcing NABIP's commitment to consumer-focused healthcare solutions.

### NABIP PAC

NABIP's PAC continues to see strong support across all regions, reflecting members' commitment to advancing our advocacy efforts.

|   |             |                          |
|---|-------------|--------------------------|
| (R1) Total Donated:                     | \$1,086.00  | Donors: 14               |
| (R2) Total Donated:                     | \$6,432.00  | Donors: 72               |
| (R3) Total Donated:                     | \$16,641.50 | Donors: 128              |
| (R4) Total Donated:                     | \$12,557.50 | Donors: 58               |
| (R5) Total Donated:                     | \$13,036.50 | Donors: 103              |
| (R6) Total Donated:                     | \$14,286.26 | Donors: 139              |
| (R7) Total Donated:                     | \$10,084.00 | Donors: 79               |
| (R8) Total Donated:                     | \$17,598.50 | Donors: 138              |
| <b>Total Contributions: \$91,722.26</b> |             | <b>Total Donors: 731</b> |

## COMMUNICATIONS, PUBLIC RELATIONS AND MARKETING

### Press Releases and Media Engagement



Issued **10 press releases**, garnering **500+ press hits** – amplifying our advocacy and resources.

### Publications and Content Creation



Published the **Winter edition of bip Magazine** in both print and digital formats, featuring a cover story on NABIP's PAC and its impact on healthcare policy.

### Marketing Campaigns

**Launched** Brokers Making a Difference marketing campaign.



**Promoted open enrollment media campaigns and chapter tools**, enhancing member visibility and support during AEP and OEP.

### Email and Social Media Metrics



Sent **67 all-member emails**; average open rate of **32%**, exceeding industry average.



Significant growth across social media platforms, with **400 new followers**, **2,780 reactions**, and **105,539 impressions in Q4**.

## CONTACT US

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[www.nabip.org](http://www.nabip.org)

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# CHAPTER PHOTOS

HERE ARE SOME IMAGES FROM OUR CHAPTER RECENTLY!



FUTURE LEADERS SUMMIT



FUTURE LEADERS SUMMIT



FUTURE LEADERS SUMMIT



ANNUAL SYMPOSIUM



ANNUAL SYMPOSIUM



ANNUAL SYMPOSIUM



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# OK KIDS KORRAL



Real stories of joy and growth  
from our community

OK Kids Korral is a facility in Oklahoma City that provides free lodging and support services for children battling cancer and their families. Operated by the Toby Keith Foundation, it offers a home-like environment for families traveling to Oklahoma City for pediatric cancer treatments, helping to reduce the financial and emotional burdens during their care. The facility includes private suites, playrooms, kitchens, and other amenities to make families' stays more comfortable.



# ANNUAL PARTNERS

## PLATINUM PARTNER



**Vision Care Direct:** Vision Care Direct of Oklahoma is a provider-owned vision insurance company offering affordable plans for individuals, families, and businesses. It partners with local optometrists to provide comprehensive eye care, including exams, glasses, contact lenses, and discounts on procedures like LASIK.

## GOLD SPONSOR

Sponsorships  
Available!!

## SILVER SPONSORS

- Manhattan Life
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- United Healthcare
- The Standard
- NueSynergy

## BRONZE SPONSORS

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- Delta Dental
- Sue Wilson Brokerage