



# Impact & Influence: Advancing Our Mission

2025 Quarterly Report – Q1

**At the National Association of Benefits and Insurance Professionals (NABIP),** we are advancing a stronger, more effective healthcare system—led by brokers, advisors, and consultants who deliver real solutions for employers and families alike.

In Q1 2025, our progress has been significant. From launching new education and certification programs to achieving advocacy wins and growing our membership base, NABIP continues to deliver results that matter.

**And, NABIP drove substantial progress across our core Key Performance Indicators:**

**Operational Excellence** – Enhancing internal systems and member experiences **Financial Vitality** – Aligning strategic initiatives with sustainable growth **Influence & Impact** – Expanding advocacy and public awareness.

# FROM THE DESK OF THE CEO

As we close out the first quarter of 2025, I want to take a moment to thank you for the energy, innovation, and purpose you continue to bring to NABIP. The impact we are making together is a testament to your commitment and to our collective mission of championing the health insurance and employee benefits profession.

Our progress spans every corner of the organization – from launching new professional development certifications and deepening our digital education offerings to driving record-breaking advocacy at the Capitol Conference. We've strengthened our voice in key policy circles, secured significant legislative wins, and positioned NABIP as a trusted resource for industry stakeholders and lawmakers alike.

We also celebrated meaningful growth across membership, communication, and engagement efforts – welcoming more than 700 new members, expanding our social media reach, and publishing compelling stories, which reinforce the indispensable value brokers provide.

This momentum is not by chance – it's the result of deliberate strategy, collaborative spirit, and the tireless work of our members, partners, and staff. As our country navigates ongoing change, thank you for continuing to lead with integrity, purpose, and passion. I look forward to the months ahead.



Jessica Brooks-Woods  
CEO, NABIP

*Jessica L. Brooks*

## OPERATIONAL EXCELLENCE

### PROFESSIONAL DEVELOPMENT & EDUCATION

#### The Online Learning Institute:

**NABIP's revamped Online Learning Institute (OLI)** has become a dynamic driver of member engagement and revenue growth. Through [nabiptraining.org](https://nabiptraining.org), our updated Learning Management System (LMS), we are equipping brokers with the tools and knowledge to thrive in a fast-changing industry.

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#### Key Launches & Upcoming Highlights:



**DC Health Link Training launched successfully**, marking our first partnership on the new LMS.

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**ICHRA Certification (April 23):** This course provides benefits and insurance professionals the training to better advise employers to achieve a higher comprehension level of the ICHRA market.

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# OPERATIONAL EXCELLENCE

## PROFESSIONAL DEVELOPMENT & EDUCATION



### Medicare Certification Update:

-  **Current course retires June 9 for annual updates;** relaunch set for June 23.
-  **Accepted by 50+** national and regional carriers.
-  **Medicare Certification revenue grew** from \$60K (2022) to nearly \$150K (2024).



### Webinar Revenue & Engagement:



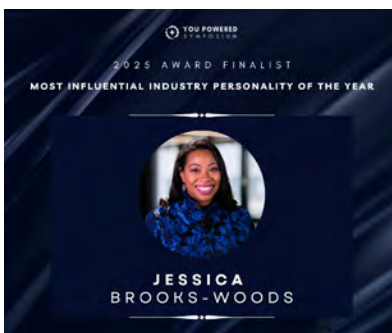
-  Our growing cybersecurity series continues to drive strong engagement and deliver added value to members.
-  Expanded partnerships, including Andy Neary's Agency Growth Accelerator Workshop series, are fueling new course development and enhanced member benefits.

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### Events & Industry Presence:

**Medicarians:** NABIP had a strong presence at this high-impact event, with over 20 members featured as speakers across a wide range of sessions. We welcomed nearly 100 new members as a direct result of our participation. Additionally, our NABIP-hosted chapter event was a standout success—selling out within minutes.



**Jessica Brooks-Woods** was recognized with a YOU Powered industry award.






**BenefitsPRO Broker Expo (May 6-8):** NABIP led the pre-conference workshop.

# FINANCIAL VITALITY

## MEMBERSHIP

**746 New Members in Q1, including 305 in March—best March since 2017.**

-  **Retention up 0.98%** since January 1.
-  **21 New Agencies and 1 New Corporate Partner.**
-  **25 chapters approved to offer \$50 membership discounts** for new member events in Q1.







**Translated 4 surveys and 12 flyers** into Spanish to broaden engagement and better serve Spanish-speaking communities.

## INFLUENCE & IMPACT

### GOVERNMENT RELATIONS & ADVOCACY

#### Capitol Conference:





-  Over 700 attendees gathered in Washington, D.C. for Capitol Conference 2025, marking the event's highest turnout in recent history.
-  Achieved record-breaking sponsorship and exhibitor revenue, reflecting strong industry support and engagement.
-  Surpassed 2024 numbers in every measurable category, including first-time attendee participation, media coverage, and post-event survey satisfaction scores.
-  Programming featured high-profile speakers, timely breakout sessions, and advocacy-focused training, helping prepare members to meet with lawmakers and elevate their policy influence.



# INFLUENCE & IMPACT

## GOVERNMENT RELATIONS & ADVOCACY



### Influencer Engagement:

-  Strengthened our presence among key healthcare policy influencers through targeted meetings with the Commonwealth Fund, MedPAC, Urban Institute, Paragon Health, and Better Medicare Alliance.
-  Presented findings from nearly 12,000 agent and beneficiary surveys, offering firsthand perspectives on the vital role brokers play in the healthcare ecosystem.
-  Addressed and corrected widespread misconceptions about the broker community's impact and role in Medicare education and enrollment.
-  Showcased data demonstrating brokers' positive influence on consumer satisfaction, plan selection accuracy, and continuity of care.




These engagements helped position NABIP as a go-to resource for policymakers seeking real-world insight into healthcare delivery and regulation.

### Working Group Policy Papers:

-  **Individual Market:** Released a policy paper calling on CMS to address fraud, waste, and abuse in the ACA Marketplace, warning that record enrollments hide growing oversight failures.
-  **Employer-Based Market:** Submitted a strong response to DOL's FAQ 8 on gag clause compliance, urging clearer rules to improve data access, boost transparency, and hold service providers accountable.

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### Joint Agent Association Letter:

-  **Co-authored a joint letter with national agent groups** urging Medicare reforms, backed by data and member stories to reinforce our unified support for agent-led assistance.

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### State-Level Highlights:

-  **240 messages sent** to state legislators on PBM reform, birthday rule, and more.



NABIP's advocacy led to a major legislative win with the signing of HB 2375 in Virginia - marking the first passage of a piece of the drug pricing transparency model legislation developed by NABIP's Task Force to Lower Prescription Drug Costs. The new law establishes common-sense transparency and accountability standards for Pharmacy Services Administrative Organizations (PSAOs).



# INFLUENCE & IMPACT

## STATE ADVOCACY UPDATE

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

- Total number of donors for Q1: **951**
- Individuals from **131 chapters** made contributions across all regions
- 30 chapters have given to the Administrative Fund this year totaling: **\$27,860.00**

\*Didn't include region \$9,244.00

Region:	Qtr 1
(R 1) Total Donated:	\$3,390.00
(R 2) Total Donated:	\$13,324.00
(R 3) Total Donated:	\$27,994.50
(R 4) Total Donated:	\$19,640.50
(R 5) Total Donated:	\$26,106.50
(R 6) Total Donated:	\$31,497.26
(R 7) Total Donated:	\$27,048.00
(R 8) Total Donated:	\$49,791.50

**Total Contributions: \$208,036.26\***

## COMMUNICATIONS, PUBLIC RELATIONS AND MARKETING

### Email Metrics:



**Achieved a 6% increase in open rates compared to Q1 2024**, with an average open rate of 39%—well above the 34% industry benchmark.

### Social Media Metrics:



**We're excited to share strong growth across NABIP's social media platforms—LinkedIn, Facebook, X, and Instagram—when comparing the first quarter of 2025 to the same period in 2024:**

- 195% increase in total posts**, reflecting our expanded efforts to keep members informed and engaged.
- 16.4% increase in followers**, showing steady community growth and increased visibility.
- 21.2% increase in impressions**, meaning our content is reaching more people than ever before.

### Public Relations Highlights:



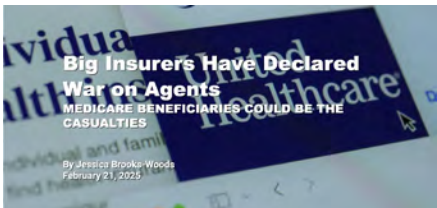
**Issued 12 press releases and secured hundreds of earned media placements** across trade and national outlets.

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**Published the Spring edition of bip Magazine**, featuring timely insights on AI in healthcare, industry thought leadership, and member success stories.

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**Published a high-profile Medicare editorial in Real Clear Health**, reaching policymakers and healthcare stakeholders.

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# INFLUENCE & IMPACT

## COMMUNICATIONS, PUBLIC RELATIONS AND MARKETING

### Brokers Making a Difference Campaign

We continue to promote our *Brokers Making a Difference* campaign, emphasizing the vital role brokers play in supporting healthcare consumers. Key highlights include:

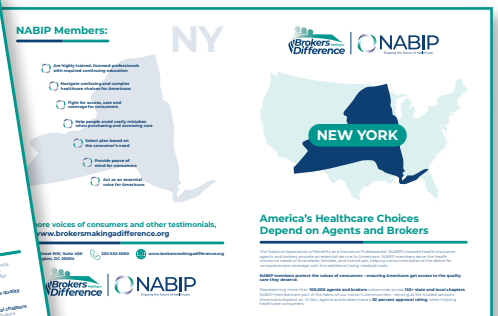
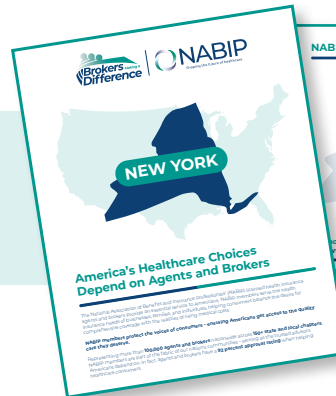
Collected over 12,000 agent and beneficiary surveys

[Click to see Brokers Making a Difference tools](#)



Activated an 8-week social media campaign promoting brokers as **healthcare superheroes**, reinforcing their role as trusted guides and healthcare advocates

Deployed a comprehensive toolkit featuring state-specific booklets, customizable social media assets, infographics, video stories, and broker testimonials



Your insights are vital to NABIP's advocacy efforts. By filling out our surveys and sharing them with your clients, you can provide the compelling stories and data that help us open doors with lawmakers, regulators, and the media to drive meaningful change.

[Scan QR code or click to share your story now](#)



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