



# Impact & Influence: Advancing Our Mission

2024 Quarterly Report – Q3

## Uniting Our Voices: Building a Better Healthcare Future Together

The National Association of Benefits and Insurance Professionals (NABIP) continues its mission of amplifying the collective voice of brokers, advisors, and consultants to build a better healthcare system.

Through strategic collaboration and a focus on shared goals, NABIP members – representing large firms, small businesses, individuals and families – are united in leading the discussions and solutions around benefits management, employee retention, and healthcare costs.

**Together, we can change healthcare for the better.**

This quarterly report, **Value & Impact**, provides a snapshot of recent achievements in NABIP's three key KPI's - **Operational Excellence**, **Financial Vitality**, and **Influence and Impact**.

# OPERATIONAL EXCELLENCE

NABIP continues to make significant strides in operational planning, membership engagement, and professional development.

## Membership Expansion and Engagement Highlights

 **22%** increase

**Significant Membership Growth:** 22% increase in new members between May and July 2024 – a notable uptick compared to the average over the past eight years.

 **218** new members

**Record-Breaking Recruitment:** July 2024 set a new benchmark with 218 new members, the highest number of July sign-ups in eight years.

 **32** events

**Medicare Summits Impact:** Held 32 events, offered \$50 incentive for new members.

## Advancing Professional Development and Education

**Strategic Webinar and Certification Launches:** Significant strides in our professional development offerings, with the successful introduction of several high-impact webinars and certifications.



**NABIP's PY2025 Medicare Advantage and Compliance Requirements Certification:**

- 1,730 individuals completed the course.
- All 50 states are approved for this certification, and 46 carriers are actively participating.
- Reinforcing NABIP's commitment to equipping agents with essential skills in the Medicare market.



**2025 Inflation Reduction Act Webinar:** 800 registrants, demonstrating strong member interest in timely and relevant policy updates.



**NABIP Medicare Moments Series:** Launched a targeted educational series focused on Medicare.



**HRAs Focused Webinar:** *The Running Your Business Webinar on Health Reimbursement Arrangements* featured in-depth case studies, practical insights.



**MERP Certification:** The launch of the **new MERP Certification, now approved in 40+ states**, reflects commitment to comprehensive, accredited professional development opportunities.



**Chapter Engagement:** Onsite chapter visits to foster collaboration and growth.

# FINANCIAL VITALITY

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NABIP's efforts have focused on strengthening our financial stability to support and sustain its essential programs.



## Strategic Partnerships:

Strengthened financial vitality through collaborations with key industry partners, including CalSurance, Knowledge Hub, LaaS Health, and Excel Health.



## Infrastructure & Technology Investments:

Investing in critical infrastructure and technology upgrades across the organization



## Annual Convention

**Success:** Exhibit Hall at Annual Convention sold out for the first time in more than a decade, reflecting increased engagement and demand; 100+ tickets for 2025 Convention were presold.

# INFLUENCE & IMPACT

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NABIP continues to elevate its influence in the healthcare industry by driving advocacy and strategic partnerships.

## Government Affairs and Advocacy

 **Accelerated Progress in Advocacy Initiatives:** Government Affairs team and our multiple working groups are driving key legislative efforts forward.


**NABIP's Rx Model Legislation** focuses on improving transparency across the pharmacy supply chain.

- Engaged with industry stakeholders – providing key feedback to help guide advocacy efforts
- Iowa identified as a target state to introduce the bill

**2 Operation Shout Outs** focused on Medicare-eligible beneficiaries with **2,800+ messages sent to lawmakers** across the nation.

**2 new Medicare surveys** gathering the feedback of **110+ agents and beneficiaries** on Medicare policy and market changes on agents and consumers.

**More than 1,500 attendees** at monthly Compliance Corner Webinars and Medicare IRA Webinars.

 **PAC Making Progress: Raised \$85,076.84** with 714 individual unique contributors from 120 chapters and 40 states; since 1/1/24, 55 chapters have contributed for **a total of \$82K to date**. Total raised tops \$424K to date in 2024. (7/1/24-9/23/24)

 **Strategic Legislative Engagement:** The Legislative Council and working groups have onboarded new members and conducted initial meetings

 **Expanded Advocacy Tools and Resources:** Enhanced advocacy toolkit by broadening the reach of District Talking Points, including new marketing initiatives on the role of agents, the launch of a "how-to" lobbying podcast, and the introduction of effective feedback mechanisms.







 **Healthcare Bill of Rights as a Guiding Framework:** Healthcare Bill of Rights has become a foundational document for NABIP's advocacy efforts, emphasizing transparency, data ownership, and the pursuit of affordable healthcare access for all.



## INFLUENCE & IMPACT *(continued)*

NABIP continues to elevate its influence in the healthcare industry by driving advocacy and strategic partnerships.

### Public Relations, Communications and Marketing Achievements

-  **Comprehensive Success Across Channels:** Significant achievements in our PR, communications, and marketing efforts
-  **Widespread Media Coverage:** 12 press releases garnered 500+ media hits.
-  **Thought Leadership:** Published op-eds in the *San Diego Times* and *Detroit News* on the IBH Model and new Medicare regulations – driving our thought leadership.
-  **Successful Social Campaigns:** Healthcare Bill of Rights social campaign yielded strong engagement and positive feedback.
-  **Expanding Member Engagement:** The launch of *bip* Magazine in both print and digital formats significantly broadened our reach and deepened member engagement. Weekly Insider Newsletter is gaining traction with excellent open rates.
-  **Innovative Member Tools:** Introduced a customizable Medicare Part D infographic and several Medicare flyers for the upcoming Annual Enrollment Period.

## Message from Jessica Brooks-Woods, CEO, NABIP

*My first year as CEO has been remarkable. Surrounded by passionate members and a dedicated staff – focused on always doing the right thing – our organization has renewed its aim on leveraging our connections and collective strength.*



*I am deeply grateful for all of you. Traveling across the U.S., I can see – together we are building trust and unity because understanding our role in the healthcare ecosystem is essential. We are not just participants; we are leaders. This quarterly report is an example of our transparency and desire to engage membership in the important, and crucial, initiatives that write our next chapter.*

*Jessica L. Brooks* – Jessica Brooks-Woods, CEO, NABIP



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