CALIFORNIA DEPARTMENT OF INSURANCE
Office of Insurance Diversity & Innovation
300 Capitol Mall, Suite 1700 - Sacramento, CA 95814
www.insurance.ca.gov/diversity

Insurance Diversity Task Force – Supplier Diversity Committee Meeting Minutes

April 30, 2026
11:15 AM – 12:15 PM (PDT)

California Department of Insurance (CDI)
CDI Sacramento (Headquarter Office)
300 Capitol Mall, 16th Floor
Sacramento, CA 95814

1. Meeting Call to Order

Roll Call – Conducted by CDI Staff – Gabriella Coplan

- Committee Members in Attendance, virtually: Rebecca Aguilera-Gardiner, Alycia Anderson, Mark Morales, Jose Plascencia, Tommy Smith, Marquita Thomas

Quorum was established. Marquita Thomas called the Insurance Diversity Task Force Supplier Diversity Committee meeting to order at 11:17 AM.

2. Introductions

Insurance Diversity Task Force (IDTF) Supplier Diversity Committee

- Rebecca Aguilera-Gardiner, Alycia Anderson, Mark Morales, Jose Plascencia, Tommy Smith, Marquita Thomas

CDI Staff

- Chandara Phanachone, Chief, Office of Insurance Diversity & Innovation; Jennifer Van, Director, Insurance Diversity Program (IDP); An Kim, Diversity Communications & Outreach Manager; Shannon McCollum, Policy & Stakeholder Engagement Manager; Gabriella Coplan, Stakeholder Engagement Analyst; Natalie Brezack-LaMarra, Senior Researcher

3. Public Comment for Items Not on Agenda

No public comments received.

4. Meeting Minutes Review & Approval

- **Task Force Action:** Mark Morales moved to approve January 27, 2026, IDTF Supplier Diversity Committee Meeting minutes. Alycia Anderson seconded the motion.
- **Outcome:** The motion was approved by a unanimous roll call vote.

Approved – 7.28.26 – IDTF

CALIFORNIA DEPARTMENT OF INSURANCE
Office of Insurance Diversity & Innovation
300 Capitol Mall, Suite 1700 - Sacramento, CA 95814
www.insurance.ca.gov/diversity

5. Debrief CA Supplier Diversity Symposium

Marquita Thomas (Supplier Diversity Committee Chair) asked the committee members to provide their feedback on the March 18, 2026, CA Supplier Diversity Symposium in Pasadena, CA.

Discussion and/or ideas from Task Force Committee members included:

- Marquita Thomas said the event was fantastic, the convention space was well laid out, and the event was well attended.
- Rebecca Aguilera-Gardiner suggested putting vendor tables around the perimeter of the room to keep things together. The schedule was so tight, people didn't get to visit the exhibitor tables.
- Mark Morales suggested carving out time for people to attend the sessions by closing the expo – have it open at the beginning, close it during sessions, open during lunch, open again at the end of the day.
- Tommy Smith highlighted if the expo has the greatest demand because of networking, then the share of the program schedule should be the expo.
- Chandara Phanachone said registration had to be shut down due to seating capacity. The expo gives attendees something to do before general session starts. The downside is people don't want to leave the conversations. In addition, fire hazard rules determine where expo can be set up. Chandara thanked Tommy Smith for his leadership and effort with the succession planning session.

6. 2026 Committee Focus

Chandara Phanachone, Commissioner Designee and Chief (OIDI), recognized the video series 'Our Stories, Our Impact' and the contributions of the Task Force members for the Women's History Month spotlight – Alycia Anderson, Vikita Poindexter, Marquita Thomas as well as outgoing Task Force member, Imelda Alejandrino. She reinforced commitment to amplifying lived experiences, humanizing the whole experience, and highlighting why the work we do matters and how it impacts the public.

Discussion and/or ideas from Task Force Committee members included:

- Alycia Anderson praised Jennifer Van and team for the hard work, calling the video beautifully done. She highlighted the strong themes of women's empowerment and thoughtful, intersectional representation in the work. Overall, Alycia felt it was an excellent reflection of the team's mission and efforts.

An Kim presented an overview of the Insurance Diversity Task Force toolkit to support social media posting by Task Force members. An highlighted the messaging guide, FAQs related to CDI, the Office of Insurance Diversity and Innovation, the Insurance Diversity Program, as well as new marketing assets. She talked about the 'Did You Know' campaign as a resource to guide Task Force members on things to post.

Discussion and/or ideas from Task Force Committee members included:

- Mark Morales asked about adding the actual survey link to support the other resources – impact sheets, diversity factsheets.
- Chandara Phanachone highlighted the data shows for every dollar an insurance company contracts with a diverse business enterprise, that in turn generates at least double the economic benefits to California's economy. For 2024, it was $3.1 billion that insurance companies spent with diverse businesses, which in turn generated over $6.7 billion in economic impact to California's economy. This is available on a social media reel in the toolkit.

Chandara Phanachone, Commissioner Designee and Chief (OIDI), highlighted the team in response to AB-2019 is working with the Community Relations and Outreach (CROB) on gathering metrics. In addition, An Kim is working on a diverse business one pager as a resource for questions we get from diverse suppliers about contract opportunities, small business advocate contacts, and the Office of Insurance Diversity & Innovation. Chandara asked if the committee members know of someone that has gotten a contract from the Diversity Summit matching event or a success story, please let the team know.

Discussion and/or ideas from Task Force Committee members included:

- Tommy Smith said they have a lot of suppliers, and they get a lot of supplier feedback. Sometimes the nature of the work is that if they were successful, you don't know about it because the supplier is busy fulfilling the contract.
- Mark Morales suggested using data from past matchmaking events and reaching out to find out if they got a contract from an insurance company.
- Marquita Thomas pointed out it does take longer than one meeting to get a contract. She suggested going back and looking at who attended the summit matchmaking before to see if they had any success. And do the same thing for insurance companies, maybe a question for a future survey.

Chandara Phanachone, Commissioner Designee and Chief (OIDI), provided an update on the 2026 California Insurance Diversity Survey (CAIDS). The survey launched on April 15 and collects required data from insurers with $75 million or

CALIFORNIA DEPARTMENT OF INSURANCE
Office of Insurance Diversity & Innovation
300 Capitol Mall, Suite 1700 - Sacramento, CA 95814
www.insurance.ca.gov/diversity

more in California direct written premiums, covering board diversity and supplier diversity practices. Reports are due July 1, and results will be published by November 1. The plan is to share the results at this year's Insurance Diversity Summit. We're expecting about 360 companies to report, and our team is actively tracking submissions and preparing high-level findings for the fall.

Discussion and/or ideas from Task Force Committee members included:

- Mark Morales offered kudos to the Department of Insurance. He talked about when he first joined the Task Force and began reviewing the data, it was difficult to look at the data. Now with the impact sheets and insurance diversity index, it makes the data have more value. Not only to insurance companies but to the consumers as well.

7. 2024-2026 Strategic Plan – Updates & Discussion

Jennifer Van, Director, Insurance Diversity Program (CDI) presented a progress update on the 2024–2026 Strategic Plan. The plan is structured around four pillars: (1) Communications and Public Relations, (2) Community Engagement, (3) Access to Opportunities, and (4) Recognition and Accountability. All strategic objectives among these four pillars are currently in Phase 3 (Execution), reflecting ongoing implementation of planned objectives.

- **(1) Communications and Public Relations Pillar Updates:**
  - **Prospective Webinars:** Planning is underway for 2026.
  - **Prospective Community Engagement:**
    - i. National Association of Insurance Commissioner (NAIC) national meetings
    - ii. CPUC En Banc in October 2026.
  - **Prospective OIDI Integrated Marketing Campaign**

- **(2) Community Engagement Pillar Updates:**
  - 2026 Diversity Dialogue – Corporate Directors Forum (March)
  - Our Stories, Our Impact Video Series
  - 2026 Women's Business Enterprise National Council (WBENC) National Conference (June)
  - 2026 National Minority Supplier Development Conference (July)
  - 2026 CA Insurance Diversity Summit (October)

- **(3) Access to Opportunities Pillar Updates:**
  - Business Matchmaking at 2026 Insurance Diversity Summit (October 2026)

CALIFORNIA DEPARTMENT OF INSURANCE
Office of Insurance Diversity & Innovation
300 Capitol Mall, Suite 1700 - Sacramento, CA 95814
www.insurance.ca.gov/diversity

- **(4) Recognition and Accountability Pillar Updates:**
  - 2026 CA Insurance Diversity Survey (CAIDS) Administration
  - Insurance Diversity Case Studies

Discussion and/or ideas from Task Force Committee members included:

Mark Morales asked how we plan to evaluate this year's data and hold companies accountable when they repeatedly report zeros. He said it's highly unlikely for large insurers to have no diverse suppliers at all, which suggests gaps in how they're reviewing or scrubbing their data. We may need stronger accountability measures, such as a commissioner's letter or other enforcement tools, to prompt more accurate reporting.

Chandara Phanachone responded that the insurance code already outlines penalties for failing to report, but companies do have discretion in how they categorize their spend, which affects report quality. The OIDI team conducts quality assurance checks and follows up with companies reporting zeros to understand why. While we can't dictate business practices, tools like the economic impact report help demonstrate the financial value of supplier inclusion, which can influence decisionmakers more effectively than moral arguments alone.

8. Future Meeting Agenda Items
Committee did not have future agenda items.

9. Public Comment
No public comment was received.

10. Adjournment
Mark Morales moved to adjourn the meeting. The motion was carried. The meeting was adjourned at 12:15 PM.

Approved – 7.28.26 – IDTF