

## 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 (IDTF) 2026 1<sup>st</sup> Quarterly Meeting Minutes

March 17, 2026  
10:00 AM – 12:00 PM (PST)

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

### 1. Task Force Meeting Call to Order

Roll Call – Conducted by CDI Staff – Gabriella Coplan

- Committee Members in Attendance (Virtually): Rebecca Aguilera-Gardiner, Linda Akutagawa, Imelda Alejandrino, Alycia Anderson, Dr. Fabiola Cobarrubias (IDTF Vice Chair), Kelly Huang, Pradip Khemani, Mark Morales, Jose Plascencia, Cecil Plummer, Vikita Poindexter (IDTF Chair), Tommy Smith, Marquita Thomas, Chandara Phanachone (Insurance Commissioner's Designee)
- Committee Member Absent: Annalisa Barrett

Quorum was established. IDTF Chair Vikita Poindexter called the Insurance Diversity Task Force meeting to order at 10:02 AM.

### 2. Introductions

Insurance Diversity Task Force ([IDTF](#))

- Rebecca Aguilera-Gardiner, Linda Akutagawa, Imelda Alejandrino, Alycia Anderson, Dr. Fabiola Cobarrubias (IDTF Vice Chair), Kelly Huang, Pradip Khemani, Mark Morales, Jose Plascencia, Cecil Plummer, Vikita Poindexter (IDTF Chair), Tommy Smith, Marquita Thomas, Chandara Phanachone (Insurance Commissioner's Designee)

CDI Staff

- 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; Stesha Hodges, Chief, Health Equity & Access Office

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### 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 December 3, 2025, IDTF 4<sup>th</sup> Quarterly Meeting minutes, and Jose Plascencia seconded the motion.
- Outcome: The motion was carried by a unanimous roll call vote.

### 5. Department Welcome Remarks

Chandara Phanachone (Chief, Office of Insurance Diversity and Innovation), recognized Women's History Month and the importance of women's leadership. She thanked the Task Force members for their leadership, empathy, humility, and compassion. Chandara highlighted the value of human dignity and connection amid rapid innovation. She noted the release of the March Diversity Digest and provided an update on preparations for the upcoming 2026 California Supplier Diversity Symposium in Pasadena. She thanked team members and state partners for their collaboration and noted that women make up about 45% of California's workforce and remain a strong force in the state.

### 6. Policy & Legislation Updates

Stesha Hodges, Chief, Health Equity & Access Office (CDI) provided the 2026 legislative updates:

- [SB 876](#) (Padilla) or Disaster Recovery Reform Act – This bill strengthens consumer protections for homeowners affected by wildfire smoke by creating clear, enforceable standards for how insurers must assess, process, and pay smoke damage claims.
- [AB 1795](#) (Gipson) or Smoke Damage Recovery Act – This bill establishes a uniform statewide standard for inspection, testing, and remediation of residential properties damaged by smoke exposure from wildfires.
- [AB 1680](#) (Calderon) or California FAIR Plan Association – This bill modernizes oversight of the California Fair Plan to ensure access to basic property insurance and high-risk wildfire areas. It expands the insurance commissioner's authority to review, approve, and enforce its operations, while improving transparency and accountability.

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- [AB 1798](#) (Wilson) or Genetic and Biomarker Discrimination and Insurance Protection Act – This bill would prohibit life and disability insurers from canceling, limiting, denying, or otherwise using coverage decisions based on genetic tests or genetic characteristics. It would also prohibit insurers from requiring, requesting, or soliciting genetic information, using genetic test results decisions related to genetic testing in any manner for an insurance purpose.
- [SB 1199](#) (Weber Pierson) or Make All Co-Pays Count Act – This bill requires health plans and insurers to count any payments made by or on behalf of enrollees, including direct drug manufacturer support, toward their out-of-pocket maximum or cost sharing limits.
- [AB 2011](#) (Hart/Wiener) or Protecting Access to Mental Health and Substance Use Disorder Care – This bill incorporates key parts of the federal Paul Wellstone and Pete Domenici Mental Health Parity and Addiction Equity Act of 2008 (MHPAEA) into state law, requiring insurers to demonstrate that mental health and substance use disorder benefits are treated the same as medical and surgical benefits. This includes explaining how they use things like prior authorization, medical necessity, network standards, and reimbursement policies.
- [SB 354](#) (Limón) or Insurance Consumer Privacy Protection Act – This bill would enact the Insurance Consumer Privacy Protection Act of 2025 to establish new standards for the collection, processing, retaining, or sharing of consumers' personal information by insurance licensees and their third-party service providers.

## 7. Guest Speaker: California Partners Project

Elizabeth Cheong, Associate Director Gender Equity California Partners Project talked about the [California Partners Project](#) (CPP) and the mission of the organization. CPP was founded in 2019 by First Partner, Jennifer Siebel Newsom, and Olivia Morgan. The mission is to advance gender equity statewide and ensure California's media and technology industries support children's wellbeing. The focus on both gender equity and child wellbeing, are closely connected and aligned with the First Partner's initiatives: California for All Women, California for All Kids, and the broader California for All Communities effort. Elizabeth highlighted SB 826, California's landmark board diversity law which was challenged in the court, and how the work CPP did to track and measure the implementation and progress of SB 826 has since led to their collaboration with the

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Stanford VMware Women's Leadership Innovation Lab to create two board playbooks – [Board Diversity Playbook](#) and [Board Culture Playbook](#).

## 8. Task Force Elections Process

Chandara Phanachone, Chief, OIDI (CDI):

- Thank you, Chair Vikita Poindexter and Vice Chair Dr. Fabiola Cobarrubias for their leadership this term.
- Based on the Task Force Handbook, this Task Force holds elections during the 2nd quarterly meeting, with nominations solicited in the 1st quarterly meeting. To vote, Task Force member must attend the 2nd quarterly meeting in accordance with the Bagley-Keene Open Meeting Act. Members received election documents outlining the process.
- Nominations for Chair and Vice Chair for 2026-2027 are now open. Members may nominate a fellow Task Force member or self-nominate.
  - Nomination(s) for IDTF Chair:
    - Mark Morales (nominated by Rebecca Aguilera-Gardiner)
    - Vikita Poindexter (self-nominated)
  - Nomination(s) for IDTF Vice Chair:
    - Alycia Anderson (nominated by Vikita Poindexter)

## 9. Task Force Administration

Jennifer Van, Director, Insurance Diversity Program (CDI) noted an updated Task Force Handbook will be distributed, with minor revisions reflecting recent legislative updates and updated Bagley-Keene guidance from legal counsel. Administrative forms related to Task Force roles will be sent for signature. For Task Force leadership nominees, the CDI team will send out instructions for submitting candidacy statements before the next quarterly meeting to prepare for the upcoming election.

## 10. 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

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these four pillars are currently in Phase 3 (Execution), reflecting ongoing implementation of planned objectives.

- **(1) Communications and Public Relations Pillar Updates:**
  - **2026 Supplier Diversity Symposium:** 2 sessions highlighted
    - i. Success Planning: Focus on employee-owned companies
    - ii. Don't Go it Alone: Accessing capital and preparedness for small businesses
  - **2026 Board Diversity Leadership Webinar**
  - **National Association of Insurance Commissioner's Leadership**
  - **CPUC En Banc (October 2026)**
  - **Communications & Public Relations Plan**
    - i. Board Diversity Impact Sheets
    - ii. Completed: Integrative Marketing Communications Campaign

Discussion and/or ideas from Task Force included:

Cecil Plummer emphasized that a major challenge in succession planning for minority-owned, women-owned, and LGBTQ-owned businesses is the lack of available capital, which often requires owners to sell outside their communities. He highlighted the idea to create a fund to help the next generation of diverse entrepreneurs purchase existing businesses and keep them locally owned. This would provide both continuity for the community and a meaningful payout for current owners.

Mark Morales noted that partnering with the U.S. Small Business Administration (SBA) could make succession financing more feasible, since SBA loans can cover up to 90 percent of a business acquisition. Because his specialty is business acquisition, Mark suggested that a dedicated fund could provide the down payment while the SBA finances the remainder. This partnership model could help diverse entrepreneurs buy and sustain existing businesses.

Tommy Smith highlighted that businesses converting to employee ownership often lose their diverse business certification because no single group holds 51 percent ownership. Perhaps agencies would consider solutions so employee-owned firms serving communities of color can retain certification and access opportunities. He added that employee ownership has bipartisan support and is a meaningful pathway for wealth creation.

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- **(2) Community Engagement Pillar Updates:**
  - The 2026 Supplier Diversity Symposium will be held in Pasadena on March 18, 2026. CDI is partnering with the California Statewide Coalition for Diversity Initiatives.
  - Strengthen collaborations with Community and/or Industry Stakeholders on events and programs:
    - i. Board Diversity Leadership Webinars
    - ii. 2026 Diversity Dialogue – Corporate Directors Forum (March)
    - iii. Task Force Interviews/Videos
      - 1. Women’s History Month (March)
      - 2. Pride Month (June)
      - 3. Veterans Month (November)
  - 2026 WBENC National Conference (June)
  - 2026 National Minority Supplier Development Conference (July)
  - 2026 CA Insurance Diversity Summit (October)

Discussion and/or ideas from Task Force members included:

Cecil Plummer talked about engaging board members through organizations that offer resources, training, and networking, and whether any progress has been made with similar groups previously identified.

Chandara explained that CDI is exploring how to best provide resources through the Insurance Diversity Program for the insurance industry to create meaningful, practical engagement. She added that a key takeaway from this work is the power of storytelling.

- **(3) Access to Opportunities Pillar Updates:**
  - Board Diversity Leadership Webinars in planning process
  - LGBTQ Procurement Forum (January 2026) –Marquita Thomas highlighted CDI OIDI staff participation, lots of panels sharing success stories and opportunities, and wonderful feedback from partners.
  - 2026 CA Supplier Diversity Symposium ‘Succession Planning’ Session (March)
  - Business Matchmaking at 2026 Insurance Diversity Summit (October)
  - CPUC En banc (October)
  - 2026 Insurance Diversity Summit (October)

Discussion and/or ideas from Task Force members included:

Mark Morales inquired if there were opportunities to join events with [Hospital Supplier Diversity Commission](#) (HSCN).

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- **(4) Recognition and Accountability Pillar Updates:**
  - Launch Phase II of the Insurance Diversity Index to enhance transparency and recognize champion companies
    - i. 2026 CA Insurance Diversity Survey –The team is preparing for the April 15<sup>th</sup> launch. The [CAIDS website](#) is updated with the 2026 CAIDS information. If there are supplier diversity leads who want to be included in the notification, send an email to [CA.IDS@insurance.ca.gov](mailto:CA.IDS@insurance.ca.gov). The team will be conducting webinars in April and May for CAIDS respondents.
  - Spearhead Diversity Case Studies – Based on results of last CAIDS Index released in October 2025, three companies' boardroom and supplier diversity chain activity will be highlighted.

## 11. Past/Upcoming Events & Announcements

- [CA Hispanic Chambers of Commerce Business Policy Summit](#) – April 14, 2026, in Sacramento, CA.
- Kaiser Permanente presents [Thriving Businesses, Thriving Communities: Growing Through Change with AI](#) – April 14, 2026
- [AI is Infrastructure: AI Ally Works Summit](#) – April 23, 2026, in Oakland, CA
- [Developmental Disability & Neurodiversity Conference](#) – April 3-4 in Vacaville, CA.
- [VIB Network Connecting America](#) – Starting April 2026
- [Insurance Diversity Task Committee Meetings](#) – April 30, 2026, in Sacramento, CA.

## 12. Future Meeting Agenda Items

- Partnership Opportunities to Support Business Owner Succession – discuss collaborating with organizations to support retiring owners and next generation transitions through technical and informational resources.
- Addressing Zero Reporting in CAIDS –discuss strategies and actionable ideas to engage insurance companies reporting zero data in CAIDS.

## 13. Public Comment

No public comment was received.

## 14. Adjournment

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Task Force Action: Jose Plascencia moved to adjourn the meeting, and Rebecca Aguilera-Gardiner seconded the motion.

Outcome: The meeting was adjourned at 11:48 AM.