

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 2nd Quarterly Meeting Minutes

June 10, 2026
10:00 AM – 12:00 PM (PDT)

California Department of Insurance (CDI)
CDI Oakland (Headquarter Office)
1901 Harrison Street
Oakland, CA 94612

1. Task Force Meeting Call to Order

Roll Call – Conducted by CDI Staff – Jennifer Van

- Committee Members in Attendance (Virtually): Rebecca Aguilera-Gardiner, Linda Akutagawa (arrived at 10:15 AM), Alycia Anderson, 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: Dr. Fabiola Cobarrubias

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, Alycia Anderson, Kelly Huang, Pradip Khemani, Mark Morales, Jose Plascencia, Cecil Plummer, Vikita Poindexter (IDTF Chair), Tommy Smith, Marquita Thomas, Chandara Phanachone (Insurance Commissioner's Designee & Chief, Office of Insurance Diversity & Innovation (OIDI))

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; Itir Yakar, Insurance Diversity & Innovation Counsel; Stesha Hodges, Chief, Health Equity & Access Office

3. Public Comment for Items Not on Agenda

No public comments received.

4. Meeting Minutes Review & Approval

CALIFORNIA DEPARTMENT OF INSURANCE

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- Task Force Action: Mark Morales moved to approve March 17, 2026, IDTF 1st Quarterly Meeting minutes, and Marquita Thomas seconded the motion.
- Outcome: The motion was carried by a unanimous roll call vote.

5. Task Force Administration & Elections Process

- Procedural Overview: Jennifer Van, Director, Insurance Diversity Program (CDI), outlined the election procedures for the 2026-2027 Insurance Diversity Task Force leadership. The 2026-2027 candidate slate included:
 - Candidates for Task Force Chair: Mark Morales, Vikita Poindexter
 - Candidate for Task Force Vice Chair: Alycia Anderson
- Candidacy Statements
 - Mark Morales read his candidacy statement for Task Force Chair.
 - Vikita Poindexter read her candidacy statement for the Task Force Chair.
 - Alycia Anderson read her candidacy statement for the Task Force Vice Chair.
- Action Taken – Roll Call Vote & Election Outcomes: Jennifer Van (CDI) – Conducted roll call voting for the candidate slate:
 - Task Force Chair Roll Call Voting Results
 - i. Ayes – Candidate Mark Morales: Rebecca Aguilera-Gardiner, Mark Morales
 - ii. Ayes – Candidate Vikita Poindexter: Linda Akutagawa, Alycia Anderson, Kelly Huang, Pradip Khemani, Jose Plascencia, Cecil Plummer, Vikita Poindexter, Marquita Thomas
 - iii. Abstain: Tommy Smith, Chandara Phanachone (Commissioner Designee)
 - iv. Absent: Dr. Fabiola Cobarrubias
 - Task Force Vice Chair Roll Call Voting Results
 - i. Ayes – Candidate Alycia Anderson: Rebecca Aguilera-Gardiner, Linda Akutagawa, Alycia Anderson, Kelly Huang, Pradip Khemani, Mark Morales, Jose Plascencia, Cecil Plummer, Tommy Smith, Marquita Thomas, Vikita Poindexter
 - ii. Abstain: Chandara Phanachone (Commissioner Designee)
 - iii. Absent: Dr. Fabiola Cobarrubias
- Confirmation of 2026-2027 Insurance Diversity Task Force Leadership: Vikita Poindexter confirmed as Chair; Alycia Anderson confirmed as Vice Chair.

6. Department Welcome Remarks & Recognition of Service

Chandara Phanachone (Chief, OIDI) congratulated the newly elected Task Force Chair, Vikita Poindexter, and Vice Chair, Alycia Anderson, and extended gratitude to all the candidates of this year's election. Chandara recognized Pride Month and the resilience of

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California's LGBTQ+ community. She thanked the CDI teams who produced this month's "Our Stories, Our Impact" feature and to Task Force members, Mark Morales and Marquita Thomas, for their meaningful contributions as the featured guests. On behalf of Commissioner Lara and the Department, Chandara formally acknowledged outgoing Task Force members, Imelda Alejandrino and Annalisa Barrett, for their years of leadership and impactful service to the people of California.

- Annalisa Barrett, in her outgoing role as board diversity expert representative on this Task Force, has elevated and magnified the impact of policies that advance board diversity by creating inroads for us into the corporate governance community, all while providing vital research to inform the mission & goals of this Task Force.
- Beginning in 2019, Imelda helped the Department conceive what would later become the very first workings of a strategic plan for this Task Force, and recognized Imelda's leadership and integrated marketing background that has continued to inspire us to think of creative ways to outreach into the communities we serve.
- Chandara expressed her gratitude for Imelda's and Annalisa's respective contributions as Task Force members who will continue to shape the future of our state's insurance industry for the people of California.

Chandara also congratulated Linda Akutagawa and Cecil Plummer on their reappointments to the Task Force and thanked them for their continued commitment to advancing diversity. She shared that the Department issued a [press release in April](#) to announce the Task Force member reappointments.

7. Policy & Legislation Updates

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

- [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.

CALIFORNIA DEPARTMENT OF INSURANCE

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- [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.

Chandara Phanachone, Chief, OIDI, provided a legislative update:

- [SB 354](#) (Limón) or Insurance Information and Privacy Protection Act – This bill would modernize the state's existing insurance privacy laws by updating standards for the collection, processing, retaining, or sharing of consumers' personal information by insurance licensees and their third-party service providers to bolster consumer privacy protections across the insurance industry.

Shannon McCollum, Policy & Stakeholder Engagement Manager provided an update on the 2026 California Insurance Diversity Survey (CAIDS).

- Launched on April 15, 2026, with reporting notifications sent to 360 companies that are required to submit reports to the 2026 CAIDS for the reporting years of 2024 and/or 2025.
- As part of the reporting process, CDI has received 100% response to required acknowledgment forms confirming receipt of the official reporting notification.
- The CAIDS statutory reporting deadline is July 1st. Companies with approved extensions on file with the Department have until July 31st to submit their reports.
- Weekly drop-in office hours are being hosted for participants to get assistance in completing CAIDS.

8. 2024-2026 Strategic Plan – Updates & Discussion

Jennifer Van, Director, IDP (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:**
 - 2026 Board Diversity Leadership Webinar
 - 2026 California Supplier Diversity Symposium
 - i. Succession planning session led by IDTF member Tommy Smith.
 - National Association of Insurance Commissioner (NAIC) national meetings
 - CPUC En Banc (October 2026)

CALIFORNIA DEPARTMENT OF INSURANCE

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- OIDI Integrative Marketing Campaign
- IDTF Toolkit

Jennifer Van highlighted the release of the board diversity impact sheets, the integrative marketing communications campaign, updates to the website, and resource documents. IDP is working on outreach success metrics as part of Pillar 1. Jennifer reinforced the Pride video's length is longer and there is a social media campaign with shorter clips.

Discussion and/or ideas from Task Force included:

Cecil Plummer commented he is glad to see the Department utilizing video as part of their social media campaigns. He would like to focus on engagement best practices as the team established metrics to consider how long people will watch a video. Suggestion is to release videos that are the length most likely to be viewed.

- **(2) Community Engagement Pillar Updates:** Strengthen collaborations with Community and/or Industry Stakeholders on events and programs:
 - 2026 Diversity Dialogue
 - Task Force Video Series "Our Stories, Our Impact"
 - i. Pride Month (June)
 - ii. Veterans Day (November)
 - 2026 WBENC National Conference (June)
 - 2026 National LGBTQ+ & Allied Chamber of Commerce (NGLCC)(July)
 - 2026 CA Insurance Diversity Summit (October)
 - 2026 National Minority Supplier Development Conference (NMSDC) (October)

Discussion and/or ideas from Task Force members included:

Mark Morales commented that the toolkit and factsheets provided to the Task Force have been valuable for community outreach. He recently used the materials to create a PowerPoint deck for a recent session on insurance requirements for contracting.

- **(3) Access to Opportunities Pillar Updates:**
 - Board Diversity Leadership Webinars outreach continues.
 - 2026 Diversity Dialogue
 - Partnership with the California Statewide Coalition for Diversity Initiatives – 2026 CA Supplier Diversity Symposium
 - CPUC Small & Diverse Business Expo & 24th Annual GO 156 Supplier Diversity En Banc
 - 2026 Insurance Diversity Summit Business Matchmaking (October)

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

Discussion and/or ideas from Task Force members included:

Cecil Plummer suggested highlighting insurance companies that lead in diversity efforts and sharing that information with diverse suppliers. The messaging would focus on how increasing awareness of companies investing in California's diverse communities could help reinforce their community impact.

9. CA Supplier Diversity Symposium

An Kim, Diversity Communications & Outreach Manager, presented an update on the 2026 CA Supplier Diversity Symposium.

- Record number of attendees (411), 40 speakers, 64 exhibitors
- 87% overall satisfaction rating
- 98% of attendees would recommend the event to a friend/colleague
- [2026 California Supplier Diversity Symposium Impact Report](#) is now available to view or share with others

An recognized the contribution of Task Force member, Tommy Smith, for his leadership in planning and leading CDI's session on succession planning at the Symposium.

10. 2026 Insurance Diversity Summit

Jennifer Van, Director, IDP, shared the team is looking at options for potential venues to secure a date. The target timeframe is between October 6th through 8th in Southern California. Jennifer opened the discussion to brainstorm session themes or ideas. Jennifer talked about community partnership opportunities and asked the Task Force to collaborate with her on potential partners.

Discussion and/or ideas from Task Force members included:

Tommy Smith suggested an Artificial Intelligence (AI) and succession planning-themed sessions. He also highlighted human-centered design for small businesses, and how small businesses can future-proof themselves.

Cecil Plummer provided a theme idea of how AI can help small businesses provide newer and better services to companies.

Vikita Poindexter suggested formulating the session to talk about how AI enhances job performance, creating jobs by helping small businesses grow – more revenue, more customers, hire more people.

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Jose Plascencia provided two potential themes: one focused on the power of storytelling to elevate diverse lived experiences and the other focused on forward-looking approach that explores how AI can share future equity, accessibility, and action. Jose brought a theme of courage, particularly at a time when we're being challenged by our thinking around DEI.

Alycia Anderson suggested that accessibility initiatives should be included, especially as AI becomes a major tool for expanding access for people with disabilities. Ensuring organizations are developing and training in this area is important for creating true belonging.

Pradip Khemani commented that AI has long existed but is now more visible. The key is to drive education about how and when AI is brought into our work, life, and elsewhere, responsibly. He encouraged a balanced approach that acknowledges both the fears of job displacement and the opportunities for upskilling, retraining, and creating future jobs.

Linda Akutagawa noted that we are operating in a period of intense and continuous change, which creates a need for risk-taking, innovation, and resilience. She added that AI could inspire and excite someone in the context of driving innovation, saving time, getting more done, etc. Bring perspective to the conversation of what is possible.

Mark Morales suggested a "Don't Go at it Alone" panel, which was very successful at the symposium. Focus on small business development center, resources for small businesses to create business plans and projects, filling out forms, financing. He said to make sure the panel covered all the bases from startup to legacy.

11. Past/Upcoming Events & Announcements

- [Veterans In Business \(VIB\) Network National Conference 2026](#) – November 2-3, 2026, in Palm Springs, CA.
- [California Hispanic Chambers of Commerce \(CHCC\) Annual Statewide Convention](#) – August 19-21, 2026, in Oakland, CA.
- [2026 LEAP Leadership Experience and Celebration](#) – July 15-16, 2026, in Los Angeles, CA

12. Future Meeting Agenda Items

- 2026 Insurance Diversity Summit

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 11:36 AM.