

CALIFORNIA DEPARTMENT OF INSURANCE

Office of Insurance Diversity & Innovation - Insurance Diversity Program

300 Capitol Mall, Suite 1700 - Sacramento, CA 95814

www.insurance.ca.gov/diversity



Insurance Diversity Task Force 2025 3rd Quarterly Meeting Minutes

Date & Time

September 10, 2025

10:00 AM – 12:00 PM (PST)

Location

California Department of Insurance (CDI)

CDI Oakland (Headquarter Office)

1901 Harrison Street - 6th Floor Conference Room

Oakland, CA 94612

I. Insurance Diversity Task Force (IDTF) Meeting Call to Order

a) IDTF Roll Call – Conducted by California Department of Insurance (CDI) Staff – Shannon McCollum

- **Remote/Virtual Attendance:** Vikita Poindexter (IDTF Chair), Rebecca Aguilera-Gardiner (arrived at/around 10:12 AM), Linda Akutagawa, Imelda Alejandrino (joined at/around 10:21 AM), Alycia Anderson, Annalisa Barrett (joined at/around 11:09 AM), Kelly Huang, Pradip Khemani, Mark Morales, Jose Plascencia, Cecil Plummer, Tommy Smith, Marquita Thomas
- **In-Person Attendance:** Chandara Phanachone (Commissioner Designee)
- **Absent:** Dr. Fabiola Cobarrubias (IDTF Vice Chair)

b) Establishment of Quorum – Quorum Established

II. Public Comment for Items Not on Agenda

No public comments received.

III. Meeting Minutes Review & Approval

Motion to approve minutes from the 2025 2nd Quarterly Insurance Diversity Task Force (IDTF) moved by Marquita Thomas (IDTF); seconded: Mark Morales (IDTF)

- Meeting minutes from 2025 2nd Quarterly IDTF **approved**

IV. Introductions

Task Force Members: Rebecca Aguilera-Gardiner, Linda Akutagawa, Imelda Alejandrino, Alycia Anderson, Annalisa Barrett, Kelly Huang, Pradip Khemani, Mark Morales, Jose Plascencia, Cecil Plummer, Tommy Smith, Marquita Thomas, Vikita Poindexter, and Chandara Phanachone (Commissioner Designee & Chief, Office of Insurance Diversity & Innovation (OIDI))

CDI Staff: Jennifer Van, Director, Insurance Diversity Program (IDP); An Kim, Manager, Insurance Diversity Program; Shannon McCollum, Manager, Insurance Diversity Program;

CALIFORNIA DEPARTMENT OF INSURANCE

Office of Insurance Diversity & Innovation - Insurance Diversity Program

300 Capitol Mall, Suite 1700 - Sacramento, CA 95814

www.insurance.ca.gov/diversity



Gabriella Coplan, Stakeholder Engagement Analyst; Miguel Bastidas, Chief Deputy Legislative Director; Julia Juarez, Deputy Commissioner of Community Relations and Outreach (CROB)

V. Department Welcome Remarks

Chandara Phanachone, Commissioner Designee & Chief, Office of Insurance Diversity & Innovation (OIDI)

- Chandara welcomed members and guests to the third quarterly meeting of the Insurance Diversity Task Force and thanked them for their continued leadership and collaboration. She reported that OIDI, established under Commissioner Ricardo Lara, now has a fully staffed Insurance Diversity Program (IDP) team, enhancing IDP's ability to expand partnerships and continue delivering on its strategic objectives.
- She acknowledged Hispanic/Latino Heritage Month, recognizing the vital contributions of California's Hispanic and Latino communities to the state's economy and civic life. Chandara also reflected on the current social climate and reaffirmed the Department's steadfast commitment to serving California's diverse consumers and maintaining focus on equity, inclusion, and opportunity. She concluded by expressing appreciation for the Task Force's ongoing dedication and partnership in advancing this important mission.

VI. Policy & Legislation Updates

Miguel Bastidas, Chief Deputy Legislative Director

Miguel highlighted legislative measures approaching final floor actions (third reading/concurrence), anticipated to reach the Governor's desk:

- [AB 888](#) (Calderon) or the CA Safe Homes Act – This measure would create a program at CDI to reduce wildfire losses through home hardening, improving insurability and community resilience.
- [SB 547](#) (Rubio) or the Business Insurance Protection Act – This measure would prohibit cancellation/non-renewal of commercial property policies for one year following declaration of a state of emergency.
- [SB 495](#) (Allen) or "Eliminate the List" Act – This measure would increase personal property coverage without requiring an itemized inventory list following state of emergency.
- [AB 843](#) (Garcia) regarding Language Access in Health Care – This measure would codify federal limited-English-proficient (LEP) language access protections for health plans/insurers; empowers the California Department of Managed Health Care (DMHC)/California Department of Insurance (CDI) enforcement.
- [AB 554](#) (Gonzalez), or the Protecting Rights, Expanding Prevention, and Advancing Reimbursement for Equity (PrEPARE) Act of 2025 – This measure would improve access to antiretroviral drugs (ARVs) for HIV prevention (like PrEP) by eliminating cost-sharing, prior authorization, step therapy, or utilization review requirements.

VII: 2024-2026 Strategic Plan – Updates & Discussion

CALIFORNIA DEPARTMENT OF INSURANCE

Office of Insurance Diversity & Innovation - Insurance Diversity Program

300 Capitol Mall, Suite 1700 - Sacramento, CA 95814

www.insurance.ca.gov/diversity

Chandara Phanachone, Commissioner Designee & Chief, Office of Insurance Diversity & Innovation (OIDI)

Jennifer Van, Director, Insurance Diversity Program (IDP)

Jennifer Van provided an overview of the 2026 administration of the California Insurance Diversity Survey (CAIDS), mandated under California Insurance Code section 927 et seq. The biennial survey collects aggregated data from admitted insurers writing \$75 million or more in California premiums, focusing on board diversity, governance practices, and supplier diversity policies and practices, along with procurement with California's diverse suppliers.

The next CAIDS cycle will officially launch in April 2026, with informational webinars planned for early 2026 so that California admitted insurers can learn more about what to expect if they are required to report to this statutorily-codified survey. Results from the 2024 CAIDS indicated that insurers reported over \$3.1 billion in spending with California diverse businesses. CDI continues to use these key findings to measure industry progress and to inform our Office's programming, including the forthcoming Insurance Diversity Index and Economic Impact Report.

a) Updates on 2024-2026 Strategic Plan:

Jennifer Van and Chandara Phanachone 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 full implementation of planned objectives.

- **(1) Communications and Public Relations Pillar Updates:** IDP is preparing to update its Diversity Fact Sheets into new Diversity Impact Sheets that highlight the economic benefits associated with diverse procurement and board inclusion. Upcoming publications include the 2025 California Insurance Diversity Index and 2024 Economic Impact reports on supplier diversity and economic impact, both of which is slated to be published by the date of the October 2025 Insurance Diversity Summit. IDP is also working on a Social Media tool kit, which will be presented at the 4th Quarterly Task Force Meeting.
- **(2) Community Engagement Pillar Updates:** The 2025 Insurance Diversity Summit is scheduled for October 14 in downtown Los Angeles, and reflects our department's continued collaboration with the California Statewide Coalition on Diversity Initiatives, which includes the Department of General Services, CalOSBA, Department of Health Care Access and Information, Caltrans, and the California Public Utilities Commission. Planning is also underway for the 2026 Supplier Diversity Symposium to be held in Southern California.
- **(3) Access to Opportunities Pillar Updates:** This pillar focuses on strengthening partnerships, such as hosting educational events that connect diverse suppliers to procurement opportunities, such as the Matchmaking segment at our upcoming Summit. IDP continues to advance these goals

CALIFORNIA DEPARTMENT OF INSURANCE

Office of Insurance Diversity & Innovation - Insurance Diversity Program

300 Capitol Mall, Suite 1700 - Sacramento, CA 95814

www.insurance.ca.gov/diversity

through outreach, collaboration, and the development of new resources that demonstrate the measurable impact of diversity within California's insurance industry.

- **(4) Recognition and Accountability Pillar Updates:** The CDI team is working to publish the 2025 Insurance Diversity Index Report later in October. We are excited to continue setting a standard of excellence for the insurance industry with this important benchmarking tool.

Jennifer asked the Task Force for suggestions for further collaborations or case study profiles. Discussion and/or ideas from Task Force members included:

- Broader sourcing forums: Pradip Khemani to share contacts (Everest Group, SIG, Gartner) as cross-industry platforms for advancing supplier diversity visibility.
- Task Force members inquired about CDI presence at conferences such as the National LGBT Chamber of Commerce (NGLCC): Desire for sustained dialogue and non-conference engagement so suppliers learn about CDI programs; Marquita offered to help convene statewide chambers, if needed.
- Linda Akutagawa highlighted board diversity headwinds: Data indicate national slow-downs in diverse board appointments. Members recommended public education and dialogue and continuing to benchmark CAIDS board data against external studies.
- Storytelling for Impact: Strong interest from Task Force about leaning into sharing success stories (i.e., diverse supplier wins in procurement contracting, progress in board diversity) as relationship-based pathways; CDI staff noted that greater programmatic capacity now allows for a renewed focus on potential case-studies among suppliers and/or insurance companies.

VIII. 2025 Insurance Diversity Summit

Jennifer Van, Director, Insurance Diversity Program (IDP)

Julia Juarez, Deputy Commissioner Community Relations and Outreach (CROB);

- Jennifer shared the latest updates of the 2025 Insurance Diversity Summit
 - Website: www.tinyurl.com/2025DivSummit
 - Date: October 14, 2025
 - Venue: Arizona State University (ASU) California Center in Los Angeles
 - Welcome/Keynotes: Commissioner Lara and invited executives (e.g., Katie Evans, CSAA Insurance Group), with additional confirmations forthcoming.
 - Resource Expo & Panels: State and/or federal government agencies, corporations, insurance companies, and diverse suppliers; business matchmaking components as well.
- Julia shared an update on CDI's Community Partnership Initiative with the Community Relations & Outreach Branch (CROB):
 - CDI is hosting monthly partnership webinars (next: Sept 26 @ 1:00 PM PDT) to onboard nonprofits and organizations that can increase

CALIFORNIA DEPARTMENT OF INSURANCE

Office of Insurance Diversity & Innovation - Insurance Diversity Program

300 Capitol Mall, Suite 1700 - Sacramento, CA 95814

www.insurance.ca.gov/diversity

attendance and disseminate CDI resources (including Low-Cost Auto program).

- Partnership expectations: Each partner (organization) to encourage ≥ 10 attendees to register for the Summit; partners can expect cross-promotion of event listings on CDI website and/or event materials.
- Media Kit: Will include content, captions, and talking points for email/LinkedIn/social media platforms to increase engagement
- Summit remains a free event to ensure equal access; historically, we can anticipate ~30% attrition rate. Task Force members asked to help increase engagement & registration by sharing info about the Summit within networks.

IX. Past/Upcoming Events & Announcements

Upcoming Events:

- Sept 26: Inclusive Governance Summit (Santa Clara, CA) – CDI plans to attend
- Oct 7–8: California Public Utilities Commission (CPUC) Supplier Diversity En Banc (Carson, CA); CDI plans to attend & exhibit
- Oct 28: Allstate Supplier Inclusion Summit (Virtual); IDP team plans to join
- Nov 12–13: National Veterans in Business (VIB) Conference (San Diego, CA); CDI plans to attend & exhibit
- Spring 2026: California Supplier Diversity Symposium – CDI is co-hosting in partnership with the California Statewide Coalition for Diversity Initiatives. An and Jennifer are our CDI leads for this project. The planning is already underway for a potential Southern CA location, so stay tuned for more details

X. Future Meeting Agenda Items

No agenda items proposed.

XI. Public Comment

- Public Comment #1 - Edwin Stephens: Attended Supplier Diversity Symposium in March 2025. Encouraged linkages to corporate procurement to make opportunities visible and actionable for small businesses.

XII. Adjournment

Motion to Adjourn: Cecil Plummer (IDTF)

Seconded: Pradip Khemani (IDTF)

Meeting adjourned at 11:41 AM PST