

FLORIDA HEALTH INSURANCE ADVISORY BOARD  
Executive Director Selection Committee Meeting

Tuesday, February 15, 2022, 2:30 PM

Conference Call

Call-In Number: 866-299-7949

Code: 1433866#

AGENDA

- I. Call to Order
- II. Roll Call
- III. Antitrust Statement - Attachment
- IV. Chair's Opening Remarks
- V. Approval of Minutes, February 11, 2022 – Attachment
- VI. Review Results of Interviews/Finalize Recommendation – Attachments
- VII. Other Business
- VIII. Adjourn

**FLORIDA HEALTH INSURANCE ADVISORY BOARD  
EXECUTIVE DIRECTOR SELECTION COMMITTEE MEETING**

**February 15, 2022**

**Antitrust Statement**

We are here to discuss and act on matters relating to the business of the Florida Health Insurance Advisory Board. We are not here to discuss or pursue the business interests of any individual companies. All of us should proceed with caution and awareness of the requirements and prohibitions of federal and state antitrust laws. We should not engage in discussions, either at this meeting or in private conversation, of our individual companies' plans or contemplated activities. We should concern ourselves only with the business of the Florida Health Insurance Advisory Board, as set forth in the agenda for this meeting and each company's business plans cannot be discussed. If you have questions, please contact the General Counsel.

*February 11, 2022*

*Draft Minutes*

*will be added later*

# FHIAB Executive Director Grading Matrix

Key Skills for the Job	John T. "Jack" McDermott	William E. (Bill) Eichhoefer	Christopher "Scott" Jenkins	Ashlee R. Tising
Date Applied	11/3/2021	11/8/2021	11/15/2021	11/17/2021
Date Acknowledged	11/3/2021	11/8/2021	11/15/2021	11/17/2021
Written Interview Questions Due?	11/10/2021	11/15/2021	11/22/2021	11/24/2021
Written Interview Questions Received?	11/4/2021	11/13/2021	11/19/2021	11/24/2021
Key Skills for the Job				
Can perform data analysis in Excel				
Can summarize data in Excel				
Can perform budget tracking and comply with audit/tax filing work with CPA firm				
Can write a letter to legislature				
Can set up meetings				
Can keep and distribute minutes				
Other Critical Factors				
Must have knowledge of health insurance markets in Florida				
Should have knowledge of insurance regulations in FL, as well as history of legislative ideas from board members				
Must understand they aren't to use the committee beyond its current scope and operation or as a platform to try and generate more business for themselves				
Must be willing to perform the job and not rely on OIR staffers to do the work because "they're the experts"				
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
Any disqualifying factors?	Y/N	Y/N	Y/N	Y/N

## Scale

Not Demonstrated - 1

Demonstrated below average proficiency - 2

Demonstrated reasonable proficiency - 3

Demonstrated strong proficiency - 4

Demonstrated expertise - 5

# FHIAB Executive Director Grading Matrix

Key Skills for the Job	Cathy Nelson	Keith Dean	John Trombetta
Date Applied	11/8/2021	11/8/2021	11/14/2021
Date Acknowledged	11/8/2021	11/9/2021	11/15/2021
Written Interview Questions Due?	11/15/2021	11/16/2021	11/22/2021
Written Interview Questions Received?	11/10/2021	11/16/2021	11/22/2021
Key Skills for the Job			
Can perform data analysis in Excel			
Can summarize data in Excel			
Can perform budget tracking and comply with audit/tax filing work with CPA firm			
Can write a letter to legislature			
Can set up meetings			
Can keep and distribute minutes			
Other Critical Factors			
Must have knowledge of health insurance markets in Florida			
Should have knowledge of insurance regulations in FL, as well as history of legislative ideas from board members			
Must understand they aren't to use the committee beyond its current scope and operation or as a platform to try and generate more business for themselves			
Must be willing to perform the job and not rely on OIR staffers to do the work because "they're the experts"			
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>
Any disqualifying factors?	Y/N	Y/N	Y/N

## Scale

Not Demonstrated - 1

Demonstrated below average proficiency - 2

Demonstrated reasonable proficiency - 3

Demonstrated strong proficiency - 4

Demonstrated expertise - 5

## Hardee, Amy

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**From:** Jack McDermott LAST\_NAME <marathonjack@comcast.net>  
**Sent:** Thursday, November 4, 2021 5:17 PM  
**To:** FHIAB  
**Subject:** RE: Application for Executive Director Position  
**Attachments:** FHIAB Executive Director Interview Questionnaire - Jack McDermott - 2021.doc

Here is my questionnaire. Thanks!

Jack McDermott

On 11/03/2021 3:44 PM FHIAB <fhiab@myfloridacfo.com> wrote:

Thank you for your interest in serving as the Florida Health Insurance Advisory Board's (FHIAB) Executive Director!

Please complete the attached Interview Questionnaire and send it back to me via reply e-mail by close of business, next Wednesday (November 10), to continue the application process. Once all responses are received, they will be sent to our Selection Committee.

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**From:** Jack McDermott LAST\_NAME <marathonjack@comcast.net>  
**Sent:** Wednesday, November 3, 2021 2:50 PM  
**To:** FHIAB <FHIAB@myfloridacfo.com>  
**Subject:** Application for Executive Director Position

Attached is my cover letter and resume for the Executive Director position at the FHIAB.

Thank you,

Jack McDermott

November 3, 2021

Dear Ms. Hardee,

I would like to be considered for the Executive Director position for the Florida Health Insurance Advisory Board (FHIAB). While working at the Florida Office of Insurance Regulation, I had the opportunity to work with past Executive Directors of the FHIAB including Jim Bracher, Carol Ostapchuk, and Michelle Newell for over a decade making me familiar with what is required for this position.

Apart from my background and qualifications including my role at the director level at OIR, I have one quality others with a background in the Florida health insurance market may not have: no conflicts of interest. I do not currently work for an insurance company, another state agency, an insurance agency paid by insurance entities, or a consulting/law firm/lobbying firm that could potentially have insurance entities as clients. My employer Florida Healthy Kids Corporation is a not-for-profit corporation. Our clients are our kids.

I am also currently enrolled in a part-time remote Master's in Accounting program at the University of Illinois, and have completed 14 credit hours of a 32 credit hour program.

I would love the opportunity to chat with you and the hiring committee. I am proposing doing this work in addition to my current job (I love my current job). I have already talked with the leadership at Florida Healthy Kids, and they have approved of me working with FHIAB if selected.

Thank you for considering me.

Sincerely,

*John T. "Jack" McDermott*

John T. "Jack" McDermott  
Director of Research, Planning & Project Management  
Florida Healthy Kids Corporation  
Tallahassee, Florida, USA

# **JOHN T. "JACK" MCDERMOTT, PMP, FLMI, CPCU, CIE, ARM,**

2438 Buttonbush Court, FL 32308

(850) 688-7873

marathonjack@comcast.net

## **PROFESSIONAL EXPERIENCE**

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Jack McDermott has over three years of private sector experience working for insurance consulting and brokerage companies, over three years with a non-profit, and 18 years of regulatory experience with the Florida Office of Insurance Regulation, including six years at the director level in two different functional areas; he cumulatively has over 15 years of management experience.

2018 – Current

### **Florida Healthy Kids Corporation**

Director Research, Planning, and Project Management

- Oversees the development, management, and execution of board driven/executive projects and initiatives, including strategic planning.
- Works with Chief Executive and Chief Financial Officer on special projects, including research, presentation development, speechwriting, and policy papers.
- Procurement manager for competitively bid contracts (up to \$50 million ) and internal project manager
- Responsible for strategic thinking, innovation, and opportunities to proactively collaborate with all staff to advance organizational goals.
- Performs contract administrator and legislative monitoring functions

2016 – 2018

### **FBMC Benefits Management, Inc.**

Marketing & Communications Manager

- Supervised a team of 10 professionals as well as contractors and vendors with responsibilities for marketing, communications, brand management, and bid-writing to develop company's overall sales and marketing strategy; oversight of an annual budget of \$1.2 million.
- Provided strategy and support for the sales team to increase annualized revenue from new clients of three-quarters of a million dollars in 2017; used medical insurance expertise to assist FBMC to transition to selling medical insurance for the first time in 2017.
- Developed new drip marketing campaigns to reach new clients, doubled the number of requests for proposals submitted in one year, spearheaded project to analyze contracted service and limit "scope creep," which saved \$124,290 in expenses year-over-year.

2015 – 2016

### **Examination Resources, LLC**

Senior Contract Examiner

- Reviewed Qualified Health Plan (QHP), and Minimum Essential Coverage (MEC) filings for the U.S. Department of Health and Human Services (HHS) including a review of eligibility requirements, guarantee renewability provisions, out-of-pocket expense limitations, network adequacy, drug formularies, policy designs for non-discriminatory outcomes, and minimum standards for Essential Health Benefits (EHBs). Reviewed Affordable Care Act (ACA) filings for the states of Texas, Missouri, Oklahoma, Alabama and Wyoming.

- Life & Health and P & C market conduct services. Reviewed state insurance laws and regulations, and determined company compliance utilizing audit procedures and programs.

2012 – 2015

**Florida Office of Insurance Regulation**

Director of Life & Health Product Review

- Supervised a staff of 25 forms and rates professionals to review all forms and rates submitted for approval in Florida. For FY 13-14, the unit processed 7,085 form and rate filings.
- Met with companies about filings including health insurance, CCRC, long-term care, and life and annuity filings to resolve issues involving policy language and rating practices.
- Point person for implementing SB 1842 (pertaining to the Affordable Care Act), redesigned internal review forms, and made presentations to the Florida Legislature and Florida Health Insurance Advisory Board.
- Represented the Office on several influential NAIC Committees including the Health Insurance & Managed Care (B) Committee, Life Insurance & Annuities (A) Committee, Senior Issues Task Force, Health Care Reform Regulatory Alternatives Working Group, and ERISA Working Group.

2009 – 2012

**Florida Office of Insurance Regulation**

Director of Communications

- Represented the Office to the news media, in responding to media requests, and in developing the Office's messaging strategy on issues important to the Office.
- Coordinated interviews for the Insurance Commissioner; also represented the Office in interviews with television and print media.
- Wrote press releases, briefing papers, speeches, and material for reports, and drafted congressional testimony for the insurance commissioner for three different U.S. House Subcommittees: Oversight and Investigations; Housing and Community Opportunity, and Capital Markets Insurance and Government Sponsored Enterprises.

2005 – 2009

**Florida Office of Insurance Regulation**

Senior Policy Analyst and Speechwriter

- Developed position papers and presentation materials, and was the primary speechwriter for the Florida Insurance Commissioner on a variety of topics including long-term care insurance, credit scoring, use of occupation and education in insurance rating, the property insurance market and the coastal insurance marketplace.
- Drafted original templates for these Office Reports still used today:
  - The Annual Workers' Compensation Marketplace Report
  - The Annual Medical Malpractice Marketplace Report
  - The Annual Freedom to Travel Report for Life Insurance

**EDUCATION**

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Master in Public Policy (M.P.P.), Harvard University

Bachelor of Arts (B.A.), Political Science, Colgate University

Bachelor of Science (B.S.) in Business, Excelsior College

Certified Public Manager (CPM), Florida State University

Project Management Professional (PMP), Project Management Institute

**SELECT OTHER PROFESSIONAL CREDENTIALS**

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Fellow, Life Management Institute (FLMI)  
Chartered Property Casualty Underwriter (CPCU)  
Associate, Risk Management (ARM)  
Associate, Research & Planning (ARP)  
Associate, Insurance Regulation and Compliance (AIRC)

# **Florida Health Insurance Advisory Board (FHIAB)**

## **Executive Director (ED) Interview Questions**

**Candidate Name: John T. "Jack" McDermott**

1. Please tell me about your recent work experience(s).

I am currently the Director of Research, Planning, and Project Management at the Florida Healthy Kids Corporation, and have worked there since 2018; Prior to this, I worked in the private sector for an insurance brokerage company in Tallahassee (FBMC), and prior to that, I worked for an insurance consulting firm in Atlanta (Examination Resources).

My most relevant experience is my 18 years working for the Office of Insurance Regulation (OIR) including six years at the director level in two different functional areas (Life & Health Product Review and Communications).

2. If you were to get this position, would you have other employment as well?

Yes. I intend to keep my position at the Florida Healthy Kids Corporation.

- a. If yes, then: Do you currently work for another entity that would present a conflict with this position?

No. The Florida Healthy Kids Corporation is a non-profit entity created by the Florida Legislature. It is not an insurance company, and we have no "clients" other than the kids and families for which we facilitate insurance coverage.

3. What is your understanding of this position and what skills do you bring to the position?

The position serves at the pleasure of the Board, and the Board Chairman, the Florida Insurance Commissioner. Ultimately, the position would be responsible for maintaining the budget, coordinating annual audits, issuing, and tracking insurance company assessments to fund the Board, arranging, and coordinating meetings, and to furnishing official notes and outlining action items of the Board in addition to writing the annual report.

4. Please describe your computer skills and what type of software you are experienced with.

I possess the standard Microsoft 365-type skills including MS Word, and Excel as well as have familiarity with a variety of CRM platforms (Salesforce/Sharepoint etc.)

5. This role requires some data analysis to be performed in Excel. Are you comfortable using Excel and performing basic data analysis?

Yes. In my role as policy analyst at OIR, and in pretty much every position I have held, I have conducted statistical analysis in EXCEL. I have completed graduate level courses in economics, finance, and accounting, and have an undergraduate business degree.

6. Please describe some data analysis you have performed in Excel.

One of my first responsibilities after being placed into OIR's Life & Health Solvency Unit was to conduct a statistical analysis of the managed care industry in Florida, and perform a thorough statistical analysis of financial statements, market share, and using an understanding of market structure – develop theories as to why Florida had several HMO insolvencies in the late 1990s. Moreover, my analysis demonstrated the importance of economies of scale in successfully managing on-going managed care organizations in the state.

7. What is your budgetary experience?

I currently work in the financial section of the Florida Healthy Kids Corporation and report to the Chief Financial Officer. My experience has been mostly involved with developing legislative budget requests (LBRs), but I am confident I can handle the budgetary responsibilities required by the FHIAB. I have also begun an online master's program in accounting at the University of Illinois.

8. Are you aware of Florida's Sunshine laws and meeting notice requirements?

Yes. I have had to comply with these requirements as part of my work at OIR; although not technically a state agency, the Florida Healthy Kids Corporations also complies with Florida's sunshine laws.

9. Have you ever set-up a meeting from beginning to end? Please describe.

I have set-up meetings through Outlook with inside and outside entities quite frequently in variety of different jobs. Most analogous to FHIAB, although in a supervisory role, I oversaw the administration of public hearings for appeals by insurance companies to challenge form and rate filing decisions.

10. Are you familiar with Florida's laws regarding health insurance and HMOs?

Yes. As Director of Life & Health Product Review, I needed a general understanding of all laws to supervise form and rate filing reviews. Also have familiarity of state laws through my role as life & health market conduct exam coordinator with OIR.

11. In your opinion, what is the biggest issue with the health insurance industry?

It is difficult to select one. Several that come to mind:

**1. Transition to Value Based Care.** This has been transpiring for a while. There is pressure to move away from fee-for-service (and insurance companies paying for “activity”), and instead incentivize insurers based on the overall health of the population they manage. Developing effective measurement tools to create these incentives has been challenging.

**2. Controlling Costs.** Medical inflation has always been an issue as medical inflation has consistently outpaced wage increases, which creates the corollary problem of affordability and access.

**3. Uninsured.** Despite the “individual mandate,” and additional government programs, the number of uninsured has been consistently increasing, even prior to the economic downturn due to COVID-19. Having increased uninsured creates a strain on healthcare providers (uncompensated care – and the need for cross-subsidization), as well as makes the overall population health worse.

12. What do you see as pros and cons of health care reform?

This really depends on what type of health care reform. Using value-based payments as an example – the pros would be if it is done correctly, you are incentivizing the outcome that you want (healthier people). The cons would be if the measurement tools and incentives actually create a different unintended outcome (for example, insurers seek to attract a healthier population to begin with – rather than work to make a random population healthier). Another con is instability and uncertainty that could happen during the transition stage.

13. Please describe what you know about the current Florida health insurance markets?

From an outside viewpoint it seems the market (at least for individuals) is surprisingly healthy in historical terms. The recent PPACA rates for Florida were approved at an increase of +6.6% (which is relatively low), of which it appears some of this increase is to offset increases in COVID-19 costs, and to handle pent-up demand. With 14 insurers participating, it appears our state has been getting good participation from the industry. Just because it has not been in the news, it is not as clear how the small-group and large-group markets are performing, especially with the number of businesses that have declared bankruptcy or had economic problems.

At this point, it appears the short-term plans (up to 364 days) have given consumers additional options and not disrupted the traditional marketplace as some policy experts assumed.

Actually, part of the reason I am interested in being the ED is to gain more insight

into what is actually happening in the health insurance marketplace by listening to Board members representing the insurance industry as well as consumer groups.

14. What experience do you have drafting letters/memos to executive leadership or legislative bodies? (*The ED will be preparing meeting agendas, Chair's remarks, and drafting legislative proposals.*)

I was the speechwriter for the Florida Insurance Commissioner for seven years (2005-2012). I drafted press releases, talking points, and drafted the commissioner's U.S. Congressional testimony on several occasions. I currently write the Chair's talking points for the Florida Health Insurance Advisory Board in my current position. In my current role (and at OIR), I assisted in drafting legislative proposals, and/or talking points based on those proposals.

15. Please understand that the ED is not to push the committee beyond its current scope and operation or as a platform to try and generate more business for themselves. Are you comfortable with the current scope and the constraints?

Absolutely. I would work at the pleasure of the Board, and its Chair, the Florida Insurance Commissioner. I do not view the ED role as someone who "pushes" any policy – instead, this role is to be a professional administrator who carries out the directives of the Board. While at OIR, I worked closely with three FHIAB EDs (Jim Bracher, Carol Ostapchuk, and Michelle Newell). I am fully aware of the role the ED plays relative to the Board. Since I am working for a non-profit, the concept of "generating more business" is not applicable to my situation.

16. Describe a tough problem that you have dealt with. Tell how you approached it and the outcome.

The most difficult problems I have ever encountered were as a manager in situations where the performance of a specific employee was in question. In my previous job I supervised an employee who was extremely well-liked, had been there forever, but was not very productive. My supervisor wanted me to either make this employee productive or fire him.

This process took several months, but I met with this employee the first thing in the morning every day, we discussed his work for the day, reviewed progress from the prior day, and I made the expectations crystal clear and impressed upon him the serious nature of our discussions. Over the next two or three months, he was more productive, but decided he really did not like the work, and sought another job elsewhere.

17. Describe two improvements you have made in your job in the past six months.

I do very well with systems management. I have helped overhaul our contract management system (adding fields, adding information, and using regular queries) as well as revised our current inventory management system. I have also been

involved in several procurements and have made suggestions to improve the procurement process

18. Tell about a decision you made that your supervisor disagreed with. How did you handle it?

In my position at the brokerage firm, my supervisor complained to me that he had wanted to reorganize the subdirectories of all our files for some time, and he had met resistance from one of the employees. He told me just to go ahead and “do it.” I decided to meet with the employee who was pushing back, and ask about it, and the employee said I would “crash the system.”

I told my supervisor that I could not in good conscious rearrange the subdirectories without researching this. After some digging, I learned that a few of our clients were directly linking to our database for documents appearing on their websites such as the employee benefits handbook (which in itself, is not a wise decision on their part). Re-organizing the subdirectories would give them “bad internet links” – not actually crash the system. I then reorganized the subdirectories except for two or three of them – and notified my staff to tell our clients they need to maintain the documents on their own systems so we can transition those subdirectories as well. Eventually, we migrated all of our subdirectories into a more usable structure.

19. When you worked on multiple projects, how did you prioritize?

This is a complicated question. Obviously, I tend to prioritize based on due dates. However, one thing that is also important is to think of workflow. If someone else is sitting (waiting) until I finish a project – I tend to prioritize that first. As most projects involve multiple people, I try to determine not just what will make me work the fastest – but what projects/tasks I can finish so others can begin their work and make the overall project finish.

20. Give an example of a time when you’ve been given an assignment that you didn’t know how to do. Can you please tell how you approached the problem – how did you handle it?

This pertains to one of my current projects – writing standardized procedures for inventory management. I do not have a lot of experience in creating a system for inventory management, and do not intrinsically know how to do it. I like starting with preparation. I like to read an academic article (like from a college business school) to give me a “big-picture” view of how an inventory system needs to work. Then I review all the relevant documents staff can find (procurement rules, purchasing rules, inventory lists) to determine what we have. Finally, I outline generally what I think is needed and a list of questions and then meet with staff to gain their input. Basically, if I do not know how to do something – I have to learn how to do it based on outside sources including understanding the knowledge from my coworkers.

21. What do you feel would be the most common errors made in a position such as this?

The most common error would be to forget the environment, and to forget to be professionally discrete. Although not “political” – the Board and its executive director operate in a “political environment” and discuss issues of health insurance, which are, by definition, political in nature. Everything is open to the “Sunshine laws” and every word muttered on public calls, or written in any document are subject to public review and scrutiny.

22. Is there anything else in your experience that you would like us to consider?

I am very well educated and can understand the complexities of the work. In addition to my three college degrees, I earned the Project Management Professional (PMP) designation as well as have a variety of other health insurance-related designations (like the FLMI – Fellow of the Life Management Institute). Currently I am enrolled in a Master’s in Accounting program at the University of Illinois and have completed 14 credit hours of a 32-credit hour program (completed *Financial Accounting and Reporting, Managerial Accounting, and Business Law for Corporations*; currently taking *Federal Taxation*). I am scheduled to complete the program in Spring 2023.

I also have no conflicts of interest – and it is difficult to find an executive director who does not have at least some conflicts related to the industry or in obtaining clients for their firm.

I also will be fascinated by the job and in listening to the “inside” perspectives of industry, regulators, and consumer advocates during a very interesting time. The rising uninsured rates, COVID-19, and a change in the presidential administration, not to mention court challenges to the Affordable Care Act – make this a very interesting time to follow health insurance developments in one of the nation’s largest states.

**Hardee, Amy**

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**From:** WILLIAM EICHHOEFER <skipperkey@comcast.net>  
**Sent:** Saturday, November 13, 2021 7:30 PM  
**To:** FHIAB  
**Subject:** RE: Executive Director  
**Attachments:** FHIAB Executive Director Interview Questionnaire.doc

As per your instructions, the completed questionnaire is attached.

All The Best,

Bill Eichhoefer

On 11/08/2021 6:27 PM FHIAB <fhiab@myfloridacfo.com> wrote:

Thank you for your interest in serving as the Florida Health Insurance Advisory Board's (FHIAB) Executive Director!

Please complete the attached Interview Questionnaire and send it back to me via reply e-mail by close of business, next Monday (November 15), to continue the application process. Once all responses are received, they will be sent to our Selection Committee.

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**From:** WILLIAM EICHHOEFER <skipperkey@comcast.net>  
**Sent:** Monday, November 8, 2021 10:02 AM  
**To:** FHIAB <FHIAB@myfloridacfo.com>  
**Subject:** Executive Director

Search Committee:

Please find attached my letter of interest and resume for this position. Feel free to contact me if you require more information.

All The Best,

Bill Eichhoefer

[skipperkey@comcast.net](mailto:skipperkey@comcast.net)

The Florida Health Insurance Advisory Board

Dear Search Committee,

When I look at becoming part of your team, these words come to mind," Do what you love. When you love your work, you become the best worker in the world." — Uri Geller. I enjoy working with groups who come together to make our community better.

I have experience in working with government entities and community groups in the big bend area and around the state. Most recently I was the coordinator of the North Florida Stand Down for Homeless and At-risk veterans. This involved working with over 60 groups and government agencies throughout the Big Bend, fundraising, coordinating more than 200 volunteers, media relations, etc. We served over 251 at-risk and homeless veterans, obtained over \$50,000 in in-kind donations and cash donations exceeding \$25,000. Prior to that event, worked with local stakeholders to formulate legislation for combat injured veterans. I contacted and worked with the Florida Department of Veterans Affairs in drafting and lobbying a Constitutional Amendment which extended the Combat Injured Property Tax Exemption to the surviving spouse. This was passed by the Florida Legislature and adopted into the Florida constitution by the voters.

I then chaired an event called Wings and Wheels. This was an Airplane, Car and Motorcycle show held at the Tallahassee Municipal Airport. The Airport estimated an attendance of over 1000 people at this first-time event. Proceeds are to benefit the same segment of the ALICE population as does Stand Down. We raised over \$20,000 in cash and \$15,000 in-kind.

Part of my management philosophy is to create an open safe environment for the sharing of ideas. I believe in a team approach. Team members should feel comfortable in expressing their ideas. Collaboration leads to success.

Throughout my career I have had to build markets. I joined Humana when they first came to this area and had to build a client base, network of providers and relationships with various community organizations. Most recently, I created a community outreach team and was nominated for an international award for having the best community outreach program in the world.

Success comes through team effort and being willing to put in the work necessary to achieve goals. When I changed jobs from Humana, they told me that I had never failed to meet goal in all of the years I worked for them. Thank you for your time.

All The Best,

Bill Eichhoefer

WILLIAM E. EICHHOEFER  
3125 PARKLAWN STREET  
TALLAHASSEE, FL 32304  
(850)556-1149  
[skipperkey@COMCAST.net](mailto:skipperkey@COMCAST.net)

Throughout my career I have been responsible for maintaining positive client relations. I maintained an average of over 98% client retention at Humana, Inc. and never missed making sales goal during my employment. Working with various community and governmental agencies on issues and events has been a daily part of my career. This included working with elected officials and the media.

## EXPERIENCE

Coordinator Wings and Wheels Aircraft, Car and Motorcycle Show (January 2021 to present). Event planning, site location and contracting. Coordinated community groups from four counties. Recruited and supervised community volunteers and handled public relations with the media and governmental entities. Estimated attendance for this first-time event 1000 people.

Coordinator North Florida Stand Down for Homeless and At-Risk Veterans 2021 (June 2021 to August 2021) Event planning, site location and contracting, coordinating core team of 60 community agencies. Recruited and supervised community volunteers and provided services for over 251 veterans. Handled public relations with the media and governmental entities.

Director of Administrative Services/Community Affairs (January 2017 to April 2021) Developed and promoted countywide community relations Program. Created speakers' program for office. Collaborated and coordinated with County, City and various Stakeholders in community outreach activities. Handled relations with local media outlets which included press releases, news articles, radio and television interviews and event promotion. Coordinated employee wellness program. Created employee engagement program. Project management. Created informational brochures. Coordinated outreach staff.

Director at Large (2018 to present) Tallahassee Branch NAACP Handles all media relations which includes writing media advisories, event promotion and heading communications committee.

KCCI Community Catalyst (2020) Worked with County, City and School board officials and staff to build bicycle safety and play parks. Wrote press releases for project and media relations.

Agent (October 2005-January 2017) Humana, Inc. Marketing Medicare Advantage and Part D insurance plans, health, life, disability, annuities, and long-term

care insurance. Established ongoing partnerships with Senior Center's, Medical Provider's and various community stakeholders. Conducted and organized events with community partners on a weekly basis.

#### COMMUNITY INVOLVEMENT

Tallahassee Senior Center Advisory Council Member  
KCCI Community Catalyst  
Tallahassee Branch NAACP Director  
Member Florida Public Relations Association  
Created Public Relations Coalition with Local Governments  
Coordinator Habitat Veterans Build  
Economics Club of Florida, Member  
J. Edward Larsen Lodge, Senior Steward and 32<sup>nd</sup> Degree Mason  
Concord Coalition, Past Acting North Florida Coordinator.  
Campaign Manager State House Race.  
Campaign Manager State Senate Race.  
Capital City Jaycees, Past President.  
Capital City Jaycees, Past Financial Vice President.  
Democratic Party, Past Secretary.  
Coach, Local High School Parliamentary Law team.

#### FLORIDA STATE UNIVERSITY

Student Senate, Past President Pro Tempore.  
Union Board, Past Member.  
Phi Beta Lambda, Past State Treasurer.  
Phi Beta Lambda, Past State Vice President.  
Coach, FSU Parliamentary Law Team.

#### EDUCATION

The Florida State University, Tallahassee, Florida. Bachelor of Science in Business Administration with emphasis in Finance, August, 1986.

#### COMPUTER

Familiar with Microsoft Office products.

## **Florida Health Insurance Advisory Board (FHIAB)**

### **Executive Director (ED) Interview Questions**

**Candidate Name: William E. Eichhoefer**

1. **Please tell me about your recent work experience(s).** Coordinator Wings and Wheels Aircraft, Car and Motorcycle Show (January 2021 to present). Event planning, site location and contracting. Coordinated community groups from four counties. Recruited and supervised community volunteers and handled public relations with the media and governmental entities. Estimated attendance for this first-time event 1000 people.

Coordinator North Florida Stand Down for Homeless and At-Risk Veterans 2021 (June 2021 to August 2021) Event planning, site location and contracting, coordinating core team of 60 community agencies. Recruited and supervised community volunteers and provided services for over 251 veterans. Handled public relations with the media and governmental entities.

Director of Administrative Services/Community Affairs (January 2017 to April 2021) Developed and promoted countywide community relations Program. Created speakers' program for office. Collaborated and coordinated with County, City and various Stakeholders in community outreach activities. Handled relations with local media outlets which included press releases, news articles, radio and television interviews and event promotion. Coordinated employee wellness program. Created employee engagement program. Project management. Created informational brochures. Coordinated outreach staff.

2. **If you were to get this position, would you have other employment as well?** That would depend if this is a full-time position or part time position. I have experience being part of associations which work both ways. I can accommodate either model.

- a. **If yes, then: Do you currently work for another entity that would present a conflict with this position?** I presently am collaborating with another lobbyist in campaign consulting and lobbying.
3. **What is your understanding of this position and what skills do you bring to the position?** My understanding of this position is that it entails handling all of the administrative tasks for running an association under the direction of the board of directors. I have experience at all levels and have no issue with handling everything from the mundane daily tasks of the organization to working with the legislature and media.
4. **Please describe your computer skills and what type of software you are experienced with.** I mainly use the Microsoft office suite of products. Some of the tasks for which I utilize them are for letters, meeting agendas, client data bases, press releases, creating forms, basic graphics, power point presentations, etc.
5. **This role requires some data analysis to be performed in Excel. Are you comfortable using Excel and performing basic data analysis?** Yes, see below.
6. **Please describe some data analysis you have performed in Excel.** Over the past several years, I have mainly used excel to maintain client and stakeholder databases. While a Financial Examiner for the State of Florida, I used them to review financial statements. I would have no issue with taking a power user review class to sharpen my skills.

7. **What is your budgetary experience?** While managing The Department of Administrative services, I compiled an annual budget I also use budgets when running community events and political campaigns.
8. **Are you aware of Florida's Sunshine laws and meeting notice requirements?** I was required to comply with the Sunshine laws as a Department Director and took annual review courses provided by the Department of Revenue.
9. **Have you ever set-up a meeting from beginning to end?** Please describe. Yes, everything from locating a venue, room set up, program development and obtaining appropriate content, notifying members, developing the agenda, printing, presiding and writing and distributing minutes. I have also worked on setting up meetings which required obtaining room discounts, etc.
10. **Are you familiar with Florida's laws regarding health insurance and HMOs?** I worked for Humana for over a decade and was required to abide by them. Humana provided training courses throughout the year for its agents. We were also required to pass AHIP and insurance law classes with a minimum score of 90. Compliance was part of the culture at Humana. While a Financial Examiner, I would sometimes collaborate with the insurance examiners when reviewing a securities offering being made by an insurance company.
11. **In your opinion, what is the biggest issue with the health insurance industry?** Maintaining a rate structure which allows the company to provide quality care while still making a profit. The aging of the baby boomers, removal of traditional underwriting, the advent of Medicare Part D and Advantage plans, more regulations, etc., have made this task more complicated than in the past. In part capitation rates to providers, fees and commissions have all been affected. Access, quality of care and profitability are all important to this process.

12. **What do you see as pros and cons of health care reform?** Allowing citizens to have access to quality care is the biggest pro of health care reform. This includes previously uninsurable citizens, expansion of quality care in the Medicare market, addressing the needs of families with children and continuing care to name a few advantages. While these things are true, the number of choices in insurance has been reduced. Many health insurance carriers have pulled out of the market. Experienced health care agents are pulling out of the market due to profitability and the federal government adding layers of regulation. All of these have all affected the quality and availability of care.

13. **Please describe what you know about the current Florida health insurance markets?** I have been a licensed insurance agent in Florida for over two decades. Most of my career was spent selling health insurance with Humana. Compliance was part of the corporate culture and we were regularly updated on changes in both federal and state law. Humana pulled out of the Obama care market. I also was one of the few internal agents allowed to sell group policies. This segment was generally contracted out.

14. **What experience do you have drafting letters/memos to executive leadership or legislative bodies? (The ED will be preparing meeting agendas, Chair's remarks, and drafting legislative proposals.)** Having been part of the executive leadership of a governmental entity, I have experience in developing and presenting letters, proposals and other documents. Part of my job entailed working with various elected officials and their staff as well as other associations and community leaders and organizations. I have experience with developing talking points, speeches, seminars, etc. for leadership. While at the Department of Banking and finance, I was involved with drafting proposed statutory regulations. I have also ghost written a number of articles which have been published in various newspapers and magazines.

15. **Please understand that the ED is not to push the committee beyond its current scope and operation or as a platform to try and generate more business for themselves. Are you comfortable with the current scope and the constraints? I have no problem with this constraint.** I do not presently solicit clients in the insurance industry.

**16. Describe a tough problem that you have dealt with. Tell how you approached it and the outcome.** One major function I had as the Director of Administrative Services was community outreach. I would spend time meeting with various groups to not just educate on current laws but to fact find and learn about the issues they had with present laws. One issue that was presented to me was by the local military commanders' group. The only military property tax exemption which did not extend to the surviving spouse of a past member of the military was the one which applied to combat disabled veterans. I collaborated with the local commanders, then met with the leadership of the Florida Department of Veterans to discuss the issue. We joined forces and drafted the proposed constitutional amendment. I proofed the bill and they obtained sponsorship within the legislature. I then was part of the lobbying effort not only in front of the legislature, but I worked to obtain the support of various professional associations. The bill eventually passed and the voters of Florida made it a part of our state constitution.

**17. Describe two improvements you have made in your job in the past six months.** Over the last six months, I have ventured back into the private sector to pursue a career in governmental and public relations. I have added event planning to my resume exhibited by the running the North Florida Stand Down for Homeless and At-risk Veterans, and Wings and Wheels, an aircraft, car and motorcycle show. Both were successful events. I was also asked to guest host a local radio show and that helped develop my skills in drawing out information.

**18. Tell about a decision you made that your supervisor disagreed with. How did you handle it?** While coordinating a large event back in August, I did not want to send out a press release over six weeks in advance. The director of the nonprofit did not agree. I explained my rationale and he accepted my decision.

**19. When you worked on multiple projects, how did you prioritize?** I developed both a strategic and operational plan for my department. This planning made sure that important deadlines were met and objectives obtained.

20. **Give an example of a time when you've been given an assignment that you didn't know how to do. Can you please tell how you approached the problem – how did you handle it?** When I was tasked with developing a community outreach program, I utilized skills which I developed while at the Department of Banking and Finance. I reached out to other governmental entities to find out how they had approached the issue. When developing a new department or looking into the possible effects of changes in law, it is very useful to research the experiences of other entities. This helps to improve results and avoid unforeseen consequences.

21. **What do you feel would be the most common errors made in a position such as this?** Not enough communication with stakeholders. Communication is key in the functioning any organization.

22. **Is there anything else in your experience that you would like us to consider?** I would bring a diverse background of experience. I have the ability to understand both the regulatory view and the private sector view of this industry. Success comes through team effort and being willing to put in the work necessary to achieve goals. When I changed jobs from Humana, they told me that I had never failed to meet goal in all of the years I worked for them. I will put in the effort and work with the members of this board, to maintain a high level of success and professionalism.

## Hardee, Amy

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**From:** C. Scott Jenkins <scott@dacf1.com>  
**Sent:** Friday, November 19, 2021 11:35 AM  
**To:** FHIAB  
**Subject:** Jenkins FHIAB Resume and Questionnaire  
**Attachments:** CS Jenkins FHIAB Executive Director Interview Questionnaire.pdf; FHIAB CV of Scott Jenkins 21-1109.pdf

Please find the answered questionnaire attached. I am also reattaching my resume for your convenience.

Thank you for your consideration.

**C. Scott Jenkins**  
Government Affairs Director  
Delegal Aubuchon Consulting LLC  
201 East Park Avenue, Suite 200B | Tallahassee, Florida 32301  
Phone: 850.583.2400 | Cell: 850.661.0829  
[scott@dacf1.com](mailto:scott@dacf1.com) | [www.dacf1.com](http://www.dacf1.com)

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**From:** FHIAB <FHIAB@myfloridacfo.com>  
**Sent:** Monday, November 15, 2021 1:53 PM  
**To:** C. Scott Jenkins <scott@dacf1.com>  
**Cc:** FHIAB <FHIAB@myfloridacfo.com>  
**Subject:** RE: FHIAB Resume

Thank you for your interest in serving as the Florida Health Insurance Advisory Board's (FHIAB) Executive Director!

Please complete the attached Interview Questionnaire and send it back to me via reply e-mail by close of business, next Monday (November 22), to continue the application process. Once all responses are received, they will be sent to our Selection Committee.

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**From:** C. Scott Jenkins <[scott@dacf1.com](mailto:scott@dacf1.com)>  
**Sent:** Monday, November 15, 2021 1:47 PM  
**To:** FHIAB <[FHIAB@myfloridacfo.com](mailto:FHIAB@myfloridacfo.com)>  
**Subject:** FHIAB Resume

To Whom It May Concern,

I am writing to request your consideration to provide executive director services to the Florida Health Insurance Advisory Board. I have considerable experience in government and organizational management. I have a background in government service and financial services, including insurance.

- As Government Affairs Director for Delegal Aubuchon, we represent a wide-variety of clients in various industries including financial services, local government, insurance, child welfare, hospitals and healthcare industries. I also manage a financial services business association and perform communications services for a child welfare organization.

- As Senior Vice President/State Government Relations Director, for Wells Fargo and Company, I worked daily to ensure that the company's voice was heard in state and local legislative and regulatory environments. In this role, I gained knowledge of the external and internal pressures that large financial services corporations face, a better understanding of how to navigate and work with dedicated financial services professionals, the operations of a multitude of business lines, and insurance concerns from a subscriber/business perspective. I also gained experience managing a multitude of internal boards and working groups.
- As Senior Vice President/Deputy Director of Government Affairs for the Florida Bankers Association (FBA), I worked daily to establish and maintain relationships with government officials, financial services and insurance professionals. The input of the hundreds of members of the FBA were invaluable to developing my understanding of the financial services and insurance industries. These relationships provided the foundation to successfully promote the Association's positions before State and Federal legislative and regulatory officials. During this time, I also gained certification in Organizational Management, which helped with my management of various boards.
- As Council Legislative Analyst in the Florida House of Representatives, I worked extensively on policy formulation and analysis. I also formed valuable connections with members of the Florida Legislature, the Florida Executive Branch and their staffs.

The FHIAB needs a person with strong management and organizational skills, who is familiar with the workings of the legislative and executive branches of Florida government. My knowledge and experience would serve the FHIAB well.

If any further information is needed, please contact me at the phone number listed above. I look forward to speaking with you. Thank you for your time and consideration.

Sincerely,

Christopher "Scott" Jenkins

**C. Scott Jenkins**

Government Affairs Director  
Delegal Aubuchon Consulting LLC  
201 East Park Avenue, Suite 200B | Tallahassee, Florida 32301  
Phone: 850.583.2400 | Cell: 850.661.0829  
[scott@dacfl.com](mailto:scott@dacfl.com) | [www.dacfl.com](http://www.dacfl.com)

Resume attached

## CHRISTOPHER “SCOTT” JENKINS

Scott@dacfli.com

(850) 661-0829

[www.linkedin.com/in/cscottjenkins](https://www.linkedin.com/in/cscottjenkins)

### GOVERNMENT RELATIONS AND MANAGEMENT EXECUTIVE

Government Relations and Management Executive with proven experience in government, political and regulatory environments. Understanding of the legislative process from various perspectives including lobbying, campaign and message management and legislative committee operations. Exceptional performance in management of large and small organizations across multiple states. Proven track record in policy analysis and its impact on targeting parties. Areas of expertise include:

- Legislative and Regulatory Process
- Organizational Management
- Message Coordination
- Relationship Building
- Strategic Partnerships
- Coalition Building
- Board Management
- Influencing and Negotiating

### PROFESSIONAL HIGHLIGHTS

- Over 22 years in the government relations and advocacy arena.
- Over 19 years in organizational management.
- Vast experience managing advocacy projects and initiatives spanning multiple states.
- Former Advisor to Legislative Body Leaders and Committee Chairs.
- Managed multiple political campaigns, both State and Federal.

### PROFESSIONAL EXPERIENCE

#### *Government Affairs Director*

**2021-Present**

**Delegal Aubuchon**, Tallahassee, FL

Contract lobbyist and consultant for a wide range of clients including financial services, local government, insurance, child welfare and healthcare industries before the Florida legislature and executive branch. Manage multiple association clients' daily administration.

- Government affairs duties include bill analysis, bill drafting, strategy development and strategic communication, policy monitoring, committee testimony, lobbying, grassroots advocacy, campaign contribution management, and coalition building.
- Management of a financial services business association, including but not limited to membership, committee organization, board meetings, reports, conference management, marketing, PAC fundraising, agenda formulation and advocacy.
- Communications duties for child welfare client, including but not limited to drafting editorials, newsletters, and advocacy materials.

#### *Senior Government Consultant*

**2019 – 2021**

**Carlton Fields**, Tallahassee, FL

Contract lobbyist and consultant for clients in the financial services, insurance, construction and manufacturing industries before the Florida legislature and executive branch. Manage multiple association clients' daily administration.

- Government affairs duties include bill analysis, bill drafting, strategy development and strategic communication, policy monitoring, committee testimony, lobbying, grassroots advocacy, campaign contribution management, and coalition building.

- Assist in the management of several trade-related membership associations, including but not limited to membership, committee organization, board meetings, reports, conference management, marketing, PAC fundraising, and advocacy agenda formulation.

***Government Relations Consultant***

**2018 – 2019**

**Wilson & Associates, LLC, Tallahassee, FL**

Contract lobbyist and consultant for a wide range of clients. Manage multiple association clients' daily administration.

- Advocate for multiple clients before state and local governments.
- Perform high level advocacy duties including but not limited to bill analysis, bill drafting, strategic development, message management, policy monitoring, lobbying, grassroots advocacy, and coalition building.
- Assist in the management of several trade-related membership associations, including but not limited to membership, committee organization, board meetings, reports, conference management, marketing, PAC fundraising, and advocacy agenda formulation

***Senior Vice President – State Government Relations Director***

**2010 – 2018**

**Wells Fargo & Company, Tallahassee, FL**

Chief lobbyist for Wells Fargo & Company and its subsidiaries before state and local governments in Florida, Georgia, North Carolina, and South Carolina. Advocated Wells Fargo's positions before State and Local legislative and regulatory officials, as well as national legislative associations, such as the National Conference of State Legislators. Managed contract lobbyists in Florida and North Carolina.

- Advocated for Wells Fargo before political organizations including Legislative Campaign Committees, Attorney General Associations, Lieutenant Governor Associations, and Governor Associations.
- Analyzed and developed legislation for proposal to state and local legislative bodies, state bankers associations, and state chambers of commerce.
- Served as board and government relations committee member to multiple state bankers associations.
- Developed and coordinated strategies and legislative proposals with peer financial services industry government relations professionals, attorneys, experts, and associated industries.
- Developed key relationships with policymakers and stakeholders, for purposes of communicating the company's position on key issues impacting Well Fargo and branch communities.
- Provided updates to Wells Fargo businesses and management boards regarding the company's position on and the effects of public policies on products and business strategies.
- Managed multi-state company initiatives and policy boards.
- Fundraised and managed Wells Fargo Employee PAC assets to support specific candidates for state legislative and statewide offices.

***Senior Vice President – Deputy Director of Government Affairs***

**2002 - 2010**

**Florida Bankers Association, Tallahassee, FL**

Association lobbyist for financial services issues, and Chief lobbyist for trust, asset management, private banking, and insurance issues. Managed 40+ members of Trust, Asset Management & Private Banking Division. Supervised Association's state government relations staff by monitoring work, evaluating performance, and conducting annual reviews.

- Created outreach initiatives to increase membership input and foster new strategic partnerships.
- Managed multiple organizational membership boards and acted as the liaison between members and association.

- Communicated current industry and legislative issues to members through various formats, including presentations, written reports, and monthly published articles.
- Assisted in the administration and promotion of State and Federal Political Action Committees.
- Liaison for national banking and insurance associations, such as the American Bankers Insurance Association.
- Supervised the administration and sales of a nation-wide, internet-based fraud prevention program, Fraud-Net.com.

***Campaign Manager, Tom McGurk for Congress***

**2002**

**Second Congressional District, Tallahassee, FL**

- Developed campaign strategies, created candidate's agenda, and policies for proposal.
- Prepared press releases, media advisories, mail pieces, radio commercials and responses to voter and press communications.
- Scheduled and coordinated volunteers, mail, telephone banks, "Get Out The Vote" programs, and campaign events such as rallies, fundraisers, and walks.

***Council Legislative Analyst, Council for Ready Infrastructure***

**2001 - 2002**

**Florida House of Representatives, Tallahassee, FL**

- Provided oversight and guidance for four legislative committees: Natural Resources & Environmental Protection, Transportation, Information Technology and Utilities & Telecommunications.
- Analyzed and developed legislation for Legislative Committees and House Members.
- Facilitated discussion between state agencies, interest groups and businesses affected by legislation.
- Ensured implementation of Speaker of the House policies and principles in legislation.
- Provided analytical and policy advisory support for the Council Chairman.
- Prepared speaking points, speeches, and bill information for House Members.
- Served as additional staffing to the Select Committee on Security (October 2001-August 2002).

***Field Director, House Campaigns***

**2000 - 2001**

**Republican Party of Florida, Tallahassee, FL**

- Provided campaign management for Florida House of Representatives campaigns.
- Developed campaign strategies, press releases, media advisories, mail pieces, radio and television commercials and responses to voter and press communications.
- Scheduled and coordinated volunteers for various initiatives during campaigns.
- Assisted in the creation of candidate agendas, including policies for proposal, and campaign finance reports.

***Lobbying Assistant/Office Manager***

**1999-2000**

**Watson & Gosnell Governmental Affairs, Tallahassee, FL**

- Provided lobbyist support for clients to promote their interests to the Florida State Legislature and Executive Branch.
- Assisted in the tracking, development and analysis of legislation while maintaining communication between the firm, state agencies, and the members of the Florida Legislature.
- Prepared weekly reports for clients regarding pertinent government issues.
- Planned and coordinated client receptions for organizations with members totaling over 15,000.
- Planned and coordinated fundraising events for legislative candidates.
- Identified and developed grant, government assistance, and bid proposals for clients.

- Responsible for the management of firm's annual budget, including accounts receivable, accounts payable and payroll activities.

#### **EDUCATION/AFFILIATIONS**

- **Master of Science, Political Science**, Florida State University, Tallahassee, FL
  - Course emphasis on Public Policy and Public Administration
- **Bachelor of Arts, Secondary Education-History**, Clemson University, Clemson, SC
  - Sigma Chi Fraternity
- **Institute for Organization Management**
  - Four-year U.S. Chamber of Commerce program emphasizing organizational and association management
- Former Board Member of the Florida Non-Profit Alliance on behalf of Wells Fargo and Company
- Former member of State Working Group for the Digital Chamber of Commerce on behalf of Wells Fargo and Company.

# **Florida Health Insurance Advisory Board (FHIAB)**

## **Executive Director (ED) Interview Questions**

**Candidate Name: Christopher “Scott” Jenkins**

**1. Please tell me about your recent work experience(s).**

Government Relations and Management Executive with proven experience in government, political and regulatory environments. Understanding of the legislative process from various perspectives including lobbying, campaign and message management and legislative committee operations. Exceptional performance in management of large and small organizations across multiple states. Proven track record in policy analysis and its impact on targeting parties. Areas of expertise include:

- Legislative and Regulatory Process
- Organizational Management
- Message Coordination
- Relationship Building
- Strategic Partnerships
- Coalition Building
- Board Management
- Influencing and Negotiating

<i>-Government Affairs Director</i> Delegal Aubuchon, Tallahassee, FL	2021-Present
<i>- Senior Government Consultant</i> Carlton Fields, Tallahassee, FL	2019 – 2021
<i>- Government Relations Consultant</i> Wilson & Associates, LLC, Tallahassee, FL	2018 – 2019
<i>- Senior Vice President – State Government Relations Director</i> Wells Fargo & Company, Tallahassee, FL	2010 – 2018
<i>-Senior Vice President – Deputy Director of Government Affairs</i> Florida Bankers Association, Tallahassee, FL	2002 - 2010
<i>-Institute for Organization Management Certification</i> -Four-year U.S. Chamber of Commerce program emphasizing organizational and association management	graduated 2007

**2. If you were to get this position, would you have other employment as well?**

Yes, I would continue to work for Delegal Aubuchon.

a. **If yes, then: Do you currently work for another entity that would present a conflict with this position?**

Having reviewed the legislative proposals of the FHIAB for 2021 and 2022, none of my firm's clients have conflicts.

**3. What is your understanding of this position and what skills do you bring to the position?**

My understanding of the position is that the FHIAB needs an experienced professional with government and organizational management experience. As previously noted, I am a government relations and management executive with proven experience in government, political and regulatory environments. I have understanding of the legislative process from various perspectives including lobbying, campaign and message management and legislative committee operations. I have exhibited exceptional performance in management of large and small organizations across multiple states with a proven track record in policy analysis and its impact on targeting parties. All these experiences will be beneficial to the role and the organization as a whole.

**4. Please describe your computer skills and what type of software you are experienced with.**

I am a well-versed and constant user of Microsoft Office applications, including Outlook, Word, Excel and Power Point. I am up to date on web browsers such as Google Chrome and Microsoft Edge. I also have minimal experience in website development from a scripting and text development standpoint. I am also able to understand new applications as they are introduced.

**5. This role requires some data analysis to be performed in Excel. Are you comfortable using Excel and performing basic data analysis?**

I have a vast amount of experience using Excel and am very comfortable performing basic data analysis.

**6. Please describe some data analysis you have performed in Excel.**

Beginning in graduate school, Excel has been a useful tool in my work. Over the years, I have used it to do such things as to compare year-over-year budgets, finance reports, political spending, user data, and survey results to name a few. I also use it to maintain lists, action items and goals. I recently used Excel to show board members of one of my clients year-over-year budget data and projections to better understand needed resources to meet their advocacy needs and goals.

**7. What is your budgetary experience?**

Over my career, I have a large amount of experience developing budgets for associations, internal boards, and political action committees.

In the legislative appropriations process, I also have “budgetary” experience advocating on behalf of my clients, their customers, and their supported community groups.

**8. Are you aware of Florida’s Sunshine laws and meeting notice requirements?**

Yes, as a career government relations and management consultant in Tallahassee dealing with state government issues, I am aware and knowledgeable of the state’s Sunshine laws and meeting notice requirements, as well as reference sources to help citizens better understand the law.

**9. Have you ever set-up a meeting from beginning to end? Please describe.**

Yes. I have experience setting up committee meetings for the legislature, and board/committee meetings for associations. I also have experience setting up and leading annual conferences for associations. These duties have included responsibilities such as setting agendas, producing minutes and summaries, coordinating lodging, choosing venues, recruiting speakers, and compiling meeting and educational materials.

**10. Are you familiar with Florida’s laws regarding health insurance and HMOs?**

While not an expert, I am familiar with Florida laws regarding hospitals, health insurance and HMOs. My work experience in this arena has largely been from the subscriber/customer viewpoint, especially during the implementation of the Affordable Care Act and its effects on employers. I have become better versed in the insurance carrier and medical provider viewpoints as I have been exposed to the laws and influences behind them during my current position.

**11. In your opinion, what is the biggest issue with the health insurance industry?**

The rising cost of medical care is the biggest issues with the health insurance industry. I have read studies that point out different contributing factors such as government policy, service price and intensity, population growth, population aging, increases in chronic illness, disease prevalence or incidence, and medical service utilization.

## **12. What do you see as pros and cons of health care reform?**

Without knowing what specific health care reform is being proposed, health care reforms in general may provide the following pros and cons:

### **PROS**

- Reforms may fix deficiencies within the system.
- Reforms may reduce health care costs when implemented.
- Reforms may change what services are received, such as preventative care, which may drive down long-term costs.
- Reforms may help people to better manage their expenses.
- Reforms may allow for continued access to health care.
- Reforms may broaden who can get access to healthcare plans.
- Reforms may improve access to medication.
- Reforms may give patients more options of where to receive healthcare from.

### **CONS**

- Reforms may take a long time to implement.
- Reforms may have unforeseen negative results.
- Reforms may create more costs to governments and therefore tax payers.
- Reforms may cause upheaval due to unfamiliarity with new structures.
- Reforms may cause costs to increase, especially for individuals.
- Reforms may cause uncertainty.
- Reforms may cause increased compliance costs, which can also increase non-compliance penalties.

## **13. Please describe what you know about the current Florida health insurance markets?**

I will focus on the markets that were produced as a result of the Patient Protection and Affordable Care Act of 2010.

In order to obtain a PPACA-plan, Florida residents must enroll through the federally-run exchange, HealthCare.gov. Florida has the highest exchange enrollment of any state in the country, with 2.1 million people enrolling during the open enrollment period for 2021, which is 17% of the entire country's exchange enrollments.

In Florida in 2017, individual market enrollment is high as a percentage of population, twice the national average (6.4%), at 12.7%. And in South Florida, it was nearly 20%. Most companies do not offer their plans in every county.

For the 2022 individual market, fourteen companies submitted rate filings for individual PPACA-compliant products. This includes four new carriers. The average

rate increase requested was 6.6% with the weighted average increasing from \$600 to \$642.

For the 2022 group market, fourteen companies submitted rate filings for small group PPACA-compliant products. The average rate increase requested is 7.9% with the weighted average increasing from \$565 to \$610.

**14. What experience do you have drafting letters/memos to executive leadership or legislative bodies? (*The ED will be preparing meeting agendas, Chair's remarks, and drafting legislative proposals.*)**

I have a large amount of experience writing for government official, company executives and association leaders. As former House staff, I wrote speeches, committee reports and bill analyses. As a lobbyist, I often draft speaking points, issue papers and memos/letter to executive leadership and legislative bodies. As a major company executive, I have written board reports and developed informational pieces to promote company initiatives internally and externally. I also have experience writing press releases and opinion pieces for publication in major newspapers.

**15. Please understand that the ED is not to push the committee beyond its current scope and operation or as a platform to try and generate more business for themselves. Are you comfortable with the current scope and the constraints?**

Yes, I understand and am comfortable with the current scope and constraints.

**16. Describe a tough problem that you have dealt with. Tell how you approached it and the outcome.**

During my career, I have had to deal with many tough problems, such as difficult personalities, tough work environments, hard problem solving, and communications issues to name a few. You could say these are daily experiences when you work with elected officials and organization members with their own agendas. I have been fortunate to be able to navigate these experiences with positive outcomes as a result of persistence.

One particularly tough problem that took multiple years to fix was correcting provisions of Florida's implementation of the Secure and Fair Enforcement for Mortgage Licensing Act of 2008 (SAFE Act) and its extraordinary anti-referral provisions. During the 2008 recession and mortgage crisis, states were required to implement their own versions to comply with the SAFE Act. At the time, the House and Senate had two independent mortgage brokers. Their businesses were failing and they had animosity toward the banks. In order to have their retribution, they

were able to insert into the 2010 state implementation act overly broad provisions that largely prohibited non-mortgage bank professionals to refer clients to bank mortgage professionals. For example, financial advisors were then prohibited from simply saying, "You may want to consider a mortgage re-finance. Go talk to our bank's mortgage lender." As long as those two legislators were still in the legislature, the new law was not going to change. I also would need their help on other issues while they continued to serve.

Luckily, with the help of my contacts at the Office of Financial Regulation (OFR), I was able to help them put the enforcement of these provisions at the bottom of their priority lists. Their limited budget and staffing made it hard to enforce such a trivial piece of conversation that routinely occurs in the financial advisory sector. This pleased my company. Also, the legislators, who were none-the-wiser, were still able to claim victory.

In 2017, after the afore mentioned legislators were term-limited, I worked with OFR to change the law to account for modern referral practices without hurting the spirit of the original law.

**17. Describe two improvements you have made in your job in the past six months.**

Two improvements that I have made in my jobs during the last six months are:

-I created an Excel database to track our firm's client's political contributions. By having one source for campaign and political committee contributions, we are more efficiently able to track support.

-As part of my modernization of an association management client, I have updated their budgetary and financial tracking into Quicken. It was previously done by hand. I have implemented a monthly board call schedule. I have also created a standard dues structure that will help attract more members to the association. Dues were arbitrarily decided previously. This has also helped us to update the fee structures for our outside contract lobbyists.

**18. Tell about a decision you made that your supervisor disagreed with. How did you handle it?**

From the outset in any new position, I try to establish with my supervisors that part of my job is help them look good. In order to do so, we need to be able to have open discussions where we both consider all viewpoints. It is common in the arena to work with and for very strong temperamental personalities who often are not told "no" by their employees.

In a previous position where I had association management responsibilities, I had to have a tough conversation with a banker who was known to be hard on his employees and was an association board member. This attitude spilled over to how he treated our association employees. He had ambition to progress through our association. The last thing that he needed to be broadcast was his negative attitude toward staff.

When I discussed this with him, he was very defensive and disagreeable. I explained to him that part of my job was to help association members look good and progress within the association. I asked him to help me because it would make my job hard if he continued to exhibit these behaviors. By seeing that he would be helping me, he began to show the appropriate behaviors toward our staff. His reputation in the association improved and he eventually became Chairman of the association.

#### **19. When you worked on multiple projects, how did you prioritize?**

I work on multiple projects on a daily basis. When I work on projects, I map out timetables to complete the projects. I am not a procrastinator. Therefore, I try to make periodic and uniform progress daily. Some smaller projects lend themselves to quick resolution over a short period such as a day, while others require longer periods of time.

I begin everyday writing my to-do list and rewriting any item that I might not have been able to complete from the previous day. Re-writing items gives me a push to focus on those items first if possible.

I like to establish deadlines for completion to help stick to the timelines, as well. Prioritization is always dependent on when things are due. However, when possible, I try to have large projects completed days in advance. This helps catch any errors and allows for more time to include any new items that may arise. By revisiting and completing subjects over several days, it also diminishes project exhaustion and creates better products.

#### **20. Give an example of a time when you've been given an assignment that you didn't know how to do. Can you please tell how you approached the problem – how did you handle it?**

As I assumed communications duties for a client, I have had to relearn many communication processes that have been improved with technology. When I started in this arena, fax machines were still a main means of communications between communications professionals, reporters and editors. I luckily work in a community of communications professionals, lobbyists, and managers, who provide beneficial advice on how to complete new experiences. In the communications capacity, I reached out to fellow communicators, who were able to explain the necessary steps

I needed to take to help my client's subjects be reported on and to help gain priority for our opinion pieces. Thus far, I have established reliable contacts with the major papers in Florida that have helped project my client's issues to the state's residents.

**21. What do you feel would be the most common errors made in a position such as this?**

When you are managing large boards, it is important to establish good relationships with all members as each are very important to the board as a whole. Often times, people in similar positions focus on a small group of members. This can lead to distrust of the executive director by the other members.

As previously noted, it is also important to help the board members understand that you are there to help them complete the board goals and make sure they look good in the process. You do not want a member who does not feel like they are able to effectively contribute to the group.

**22. Is there anything else in your experience that you would like us to consider?**

The Florida Health Insurance Advisory Board needs a strong, well-informed leader to help ensure the board meets its mission and goals, as well as to form and build relationships with constituent groups and policy makers. I believe my knowledge, experience and abilities are a perfect fit for this position.

Thank you for your consideration.

## Hardee, Amy

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**From:** ashlee.tising@akerman.com  
**Sent:** Wednesday, November 24, 2021 12:42 PM  
**To:** FHIAB  
**Subject:** RE: Resume for FHIAB Executive Director Position  
**Attachments:** Ashlee Tising - FHIAB Executive Director Interview Questionnaire.DOC; Ashlee Tising - FHIAB Executive Director Interview Questionnaire.PDF

Good afternoon,

Attached is my completed questionnaire for consideration by the FHIAB Selection Committee for the next Executive Director. Please let me know if you have any additional questions.

Happy Thanksgiving, and all my best.

Ashlee

### **Ashlee R. Tising**

Public Policy Consultant  
Akerman LLP | 201 E. Park Ave, Suite 300 | Tallahassee, FL 32301  
D: 850 425 1671 | C: 850 449 2949  
[ashlee.tising@akerman.com](mailto:ashlee.tising@akerman.com)

---

**From:** FHIAB <FHIAB@myfloridacfo.com>  
**Sent:** Wednesday, November 17, 2021 2:14 PM  
**To:** Tising, Ashlee (Cnslt-Tlh) <ashlee.tising@akerman.com>  
**Cc:** FHIAB <FHIAB@myfloridacfo.com>  
**Subject:** RE: Resume for FHIAB Executive Director Position

[External to Akerman]

Thank you for your interest in serving as the Florida Health Insurance Advisory Board's (FHIAB) Executive Director!

Please complete the attached Interview Questionnaire and send it back to me via reply e-mail by close of business, next Wednesday (November 24), to continue the application process. Once all responses are received, they will be sent to our Selection Committee.

---

**From:** [ashlee.tising@akerman.com](mailto:ashlee.tising@akerman.com) <ashlee.tising@akerman.com>  
**Sent:** Wednesday, November 17, 2021 9:46 AM  
**To:** FHIAB <[FHIAB@myfloridacfo.com](mailto:FHIAB@myfloridacfo.com)>  
**Cc:** Hardee, Amy <[Amy.Hardee@flioir.com](mailto:Amy.Hardee@flioir.com)>; Platt, Bruce (Ptnr-Tlh) <[bruce.platt@akerman.com](mailto:bruce.platt@akerman.com)>  
**Subject:** Resume for FHIAB Executive Director Position

Good morning, Amy:

Attached is my resume submission for the FHIAB Executive Director position.

As you are aware, I worked at OIR for seven years and am now a public policy consultant at Akerman, who has significant, similar experience as the plan manager of the Florida Health Maintenance Consumer Assistance Plan.

As Executive Director of FHIAB, I would bring, not only, my experience and expertise in state government but also the full support and backing of the firm with me. I wholeheartedly believe this combination would be nothing but beneficial for the Board.

Should the Board and the selection committee have any questions, please don't hesitate to contact me at any time.

All my best,  
Ashlee

**Ashlee R. Tising**

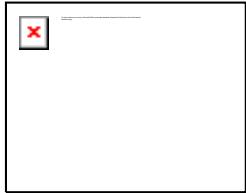
Public Policy Consultant

Akerman LLP | 201 E. Park Ave, Suite 300 | Tallahassee, FL 32301

D: 850 425 1671 | C: 850 449 2949

[ashlee.tising@akerman.com](mailto:ashlee.tising@akerman.com)

[vCard](#) | [Profile](#)



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# ASHLEE R. TISING

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201 E. Park Ave., Ste. 300, Tallahassee, FL 32301 ♦ C: (850) 449-2949 ♦ [Ashlee.Tising@akerman.com](mailto:Ashlee.Tising@akerman.com)

## Professional Summary

Over 17 years of experience traversing Florida government in both the public and private sector; well versed in Florida Sunshine Laws, insurance regulation, medical cannabis, budgets, marketing and public relations; strong, confident, intelligent and able to build strong, long-lasting, working relationships.

## Work History

### **Public Policy Consultant, 1/2018 to Present**

**Akerman** – Tallahassee, Florida

- Assist clients with health insurance and health maintenance organization (HMO) regulatory issues
- Present before the Office of Medical Marijuana Use (OMMU) and attend and summarize OMMU rule hearings and workshops on behalf of clients as needed
- Work with a variety of regulatory agencies on client-related issues as needed
- Monitor COVID-19 related happenings in Florida for firm leadership
- Lobby the Florida Legislature on various client issues -- Successfully secured \$1.5 million in 2018 for a local government; and \$500,000 for the City of Mexico Beach and \$1.9 million for Florida's Early Childhood Court Program in 2020
- Track and maintain spreadsheets related to legislative campaigns and political action committees
- Prepare and distribute to clients summary reports of legislative and executive actions
- Assist Akerman in arranging and conducting internal meetings and prepare and distribute material related to same

\* My experience and expertise in state government provides me with a strong foundation that would greatly enhance my performance as the Executive Director of FHIAB. Additionally, my Akerman colleagues have experience with similar positions, and I would have the benefit of their collective experience and advice in performing my duties as Executive Director. In addition, because the actual contract would be with Akerman (as opposed to directly with me), the FHIAB would have all of Akerman's resources as necessary.

### **Government Relations Consultant, 11/2017 to 5/2018**

**Capitol Alliance Group** – Tallahassee, Florida

- Served as the primary contact and lobbied the Florida Legislature on the early childhood court program, working closely with interested parties, legislators and staff

### **Assistant Director of Legislative Affairs, 10/2014 to 8/2017**

**Greenberg Traurig** – Tallahassee, Florida

- Updated clients, lobbyists and attorneys on legislative happenings year-round, including, but not limited to, bill and amendment filings; committee schedules and deadlines; changes in leadership, committee structure and membership; announcements from leadership; the budget process; special sessions; and, Governor actions
- Served as go-between on public records with state agencies, local governments and transportation commissions.
- Served as the primary contact and resource regarding medical cannabis in Florida, including but not limited to legislation, rule development and workshops, litigation, administrative hearings, constitutional amendments, and public records
- Compiled reports for distribution, talking points, and letters for various issues and purposes, including insurance, campaigns, election results, marketing, pitches and requests for proposal

### **Government Affairs/Communications Coordinator, 8/2007 to 10/2014**

**Florida Office of Insurance Regulation** – Tallahassee, Florida

- Analyzed bills relating to insurance, including but not limited to life and health, property and casualty, and workers compensation
- Drafted office statements, media advisories, and press releases, as well as newsletter articles
- Updated website content and created tutorials for the I-File Search System and CHOICES - the shop and compare tool for automobile and homeowners' insurance

- Drafted and edited end-of-Session reports
- Followed the promulgation of rules and attended rule hearings
- Presented agenda items to the Cabinet Aides a week prior to the Commissioner's presentation
- Devised good working relationships with Cabinet members, Legislators, staff, and industry representatives
- Served as point-of-contact for all constituent issues
- Coordinated, tracked, edited, and delivered all statutorily required reports to ensure office compliance

*Special Recognition:* 2012 Florida Tax Watch Davis Productivity Award of Distinction

**Graduate Admissions Officer**, 10/2006 to 8/2007

**Florida State University Office of Admissions** – Tallahassee, Florida

- Advised potential graduate students on requirements for admission to the university and desired department

**Executive Assistant**, 1/2005 to 10/2006

**Florida Association of Professional Lobbyists** – Tallahassee, Florida

- Served as a primary contact for associations members and worked to recruit new members

**Intern**, 8/2004 to 12/2004

**U.S. Senator Bill Nelson's Office** – Tallahassee, Florida

- Addressed constituent issues by phone, mail, email, and maintained the U.S. Senate database
- Worked closely with offices in Florida and Washington, D.C.

**Leadership Consultant**, 7/2002 to 4/2003

**Alpha Gamma Delta International Fraternity** – Indianapolis, Indiana

- Traveled extensively to colleges and universities throughout the United States
- Worked closely with collegiate members on aspects of membership, recruitment, finance, scholarship, and philanthropy
- Developed respectable relations with college administrators, advisors, and Panhellenic Council

## **Education**

**Master of Science:** Applied American Politics and Policy, December 2004, 3.64 GPA

**Florida State University** – Tallahassee, Florida

Completed a graduate thesis based on the internship with U.S. Senator Nelson's office.

**Bachelor of Music:** Vocal Performance, May 2002, Magna Cum Laude

**Brenau University** – Gainesville, Georgia

*References available upon request*

## **Florida Health Insurance Advisory Board (FHIAB)**

### **Executive Director (ED) Interview Questions**

**Candidate Name:** Ashlee R. Tising

1. Please tell me about your recent work experience(s).

**I have been a public policy consultant at Akerman LLP for four years and am heavily involved with the Health Care, Cannabis, and Public Policy Practice Groups. As a member of the Health Care Practice Group, I assist clients with health insurance and health maintenance organization (HMO) regulatory issues; track legislation and provide internal and external updates on Florida health care bills; and, prepare and distribute summary reports to clients regarding legislative and executive actions. Additionally, since the onset of the COVID-19 Pandemic, I have monitored COVID-19 related happenings throughout Florida for firm leadership. Lastly, my experience working at the Florida Office of Insurance Regulation (OIR) provided me a unique insight into the regulatory process, and I often consult with the firm's attorneys on navigating the inner-workings of Florida's regulatory agencies for clients.**

2. If you were to get this position, would you have other employment as well?

**Yes**

- a. If yes, then: Do you currently work for another entity that would present a conflict with this position?

**No. My experience and expertise in state government provides me with a strong foundation that would greatly enhance my performance as the Executive Director of FHIAB. Additionally, my Akerman colleagues have experience with similar positions, and I would have the benefit of their collective experience and advice in performing my duties as Executive Director. In addition, because the actual contract would be with Akerman (as opposed to directly with me), the FHIAB would have all of Akerman's resources as necessary.**

3. What is your understanding of this position and what skills do you bring to the position?

**The person hired for this position should possess in-depth knowledge of the health insurance industry; the ability to organize and structure productive and**

engaging meetings; and, the composure to work with multiple parties, who will undoubtedly differ in opinion from time to time.

Health insurance is, in general, quite complex. To those unfamiliar with the various divisions in federal, state, and agency oversight, it can be quite daunting. Having spent seven years at OIR and five years in the private sector in government affairs, I am well-versed and extremely familiar with all aspects of health insurance in Florida and believe I have all the qualities, skills, and contacts necessary to be an effective and efficient Executive Director.

While at the OIR, some of my duties included, but were not limited to:

- Tracking bills and completing bill analyses;
- Drafting communications from the Commissioner;
- Serving as liaison for Legislators and Cabinet members on legislation and constituent issues;
- Rule promulgation and tracking;
- Organizing rule hearings, workshops, and other public meetings in Tallahassee and other locations in Florida;
- Presenting OIR Cabinet Agenda items before Cabinet Aides; and,
- Working with Cabinet and legislative staff, as well as industry lobbyists and attorneys.

Many of those duties, and others not mentioned, required intense and extensive organizational skills to ensure all statutory requirements and stakeholders' demands were met.

4. Please describe your computer skills and what type of software you are experienced with.

I have advanced skills in standard office productivity programs such as Adobe PDF; Nuance PDF; Outlook; Word; Excel; and PowerPoint. I am also adept with the main social media platforms such as LinkedIn, Twitter, Facebook, etc.

5. This role requires some data analysis to be performed in Excel. Are you comfortable using Excel and performing basic data analysis?

Yes.

6. Please describe some data analysis you have performed in Excel.

I have performed calculations involving multiple factors, estimations, and standard data sorting and assessments (e.g., converting data to graphical presentations, highlighting data trends, and identifying and presenting factual conclusions).

7. What is your budgetary experience?

**I have followed and worked on legislative budget analyses at both OIR and Akerman. I am very skilled at analyzing and understanding all aspects of cost analysis (incomes, outcomes, needs, and wants).**

8. Are you aware of Florida's Sunshine laws and meeting notice requirements?

**Yes. I am a strong proponent of Florida's Sunshine and public records laws and understand that meetings, hearings and workshops must be accessible to the public, must be noticed in a reasonable amount of time to allow for such public participation and minutes must be taken. Of course I also understand that board members cannot communicate directly with each other regarding board business, unless such communications are in the Sunshine (as discussed above), and I am very familiar with Florida's public records requirements.**

9. Have you ever set-up a meeting from beginning to end? Please describe.

**Yes. I assisted with set up and organization of multiple workshops and rule hearings for OIR, some of which were located outside Tallahassee. Additionally, while working with the Florida Association of Professional Lobbyists, I was charged with organizing the annual conferences and all educational conferences.**

10. Are you familiar with Florida's laws regarding health insurance and HMOs?

**Yes.**

11. In your opinion, what is the biggest issue with the health insurance industry?

**While there are many issues to choose from, rapidly increasing provider costs (including pharmaceuticals), which are impacted by fraud and "defensive" medicine, is one of the biggest issues facing the health insurance industry as a whole.**

12. What do you see as pros and cons of health care reform?

**Pros – More people seeking preventative care and treatment from primary care physicians or specialists instead of automatically going to emergency rooms.**

**Cons – Pharmaceutical costs are still egregious and premiums remain unaffordable for many.**

13. Please describe what you know about the current Florida health insurance markets?

**Recently, Florida has gone from 10 health plans in the Federal Marketplace Exchange to 14. In addition to the increase in plans, Florida currently has the highest rate of marketplace enrollment in the country at 17%, which is \$2.1 million people. Lastly in regards to the Federal Marketplace, the OIR approved and publicly announced a 6.6% statewide, weighted rate increase for exchange plans.**

**During the 2020 Legislative Session, ground breaking language was included in the General Appropriations Act that extended post-partum care for Medicaid mothers from two months to a year.**

**Also during the 2020 Legislative Session, House Bill 747 relating to Coverage by Air Ambulance Services was passed into law, making Florida the first state in the country to ban balance billing by air ambulances. After passage of the legislation, Air Methods Corporation and Rocky Mountain Holdings LLC filed a lawsuit to dismiss the balance billing prohibition, but on October 13, 2021, the United States District Court for the Northern District of Florida issued a final order dismissing the lawsuit and upholding the law. In addition to the Federal Court upholding the law, the Federal Government passed the No-Surprises Act, which mirrors Florida's HB 747-2020 and takes effect January 1, 2022.**

14. What experience do you have drafting letters/memos to executive leadership or legislative bodies? (*The ED will be preparing meeting agendas, Chair's remarks, and drafting legislative proposals.*)

**I drafted letters, memos, agendas, and chair's remarks during my time at OIR. Also, while in the private sector, I contributed to several alerts and memos to clients, attorneys, and other colleagues regarding legislation of interest.**

15. Please understand that the ED is not to push the committee beyond its current scope and operation or as a platform to try and generate more business for themselves. Are you comfortable with the current scope and the constraints?

**Absolutely.**

16. Describe a tough problem that you have dealt with. Tell how you approached it and the outcome.

**Generally, with any tough problem, my philosophy is to organize my thoughts and take the issue one step at a time. For example, during the time I was applying to be an Akerman public policy consultant, I did not have any clients of my own at the time and I needed to be able to demonstrate the value I would bring to the firm. Thus, I took the process step-by-step.**

**First, I worked on developing and strengthening relationships with appropriate people in my industry, not only at Akerman but also with others closely connected to the firm, to help demonstrate my legitimacy.**

**Second, to further demonstrate my value to Akerman, I developed a business plan that focused on i) potential clients I could bring to the firm, (ii) key executive and legislative branch relationships, and (iii) strategies for increasing my visibility and marketability once hired.**

**Third, to show my commitment and desire to be part of the Akerman team, I worked to bring in clients even before I was hired.**

**While I often worked on these steps simultaneously, dividing them into steps helped with strategy and focus and, ultimately, helped me achieve my goal.**

17. Describe two improvements you have made in your job in the past six months.

**During the last six months:**

- a. I successfully secured a new client for Akerman, which has already resulted in multiple retainers. The new client I originated has led to more work for attorneys in different practice areas other than my own.
- b. And, I continued to be a point person for attorneys challenged with navigating Florida's regulatory process through the COVID-19 Pandemic. Despite the challenges presented by the COVID-restricted environment, I have been able to contact the appropriate people throughout multiple agencies and get answers for attorneys and their clients in a quick and reliable manner.

18. Tell about a decision you made that your supervisor disagreed with. How did you handle it?

**In the past, when scenarios such as this arose, I preferred to discuss with my supervisor the approach he or she would have taken – there is always room for improvement and learning.**

**More specifically, in a recent situation, I approached my supervisor in a private setting so that there would be no "loss of face." I explained the reasoning behind my decision, and I asked to understand the reasons for my supervisor's disagreement. In this particular instance, I was not aware of certain information, and I agreed with my supervisor after the discussion. However, having the discussion helped my supervisor understand why I made**

the decision I made, and it helped me focus on trying to get all of the necessary information when similar decisions need to be made in the future.

19. When you worked on multiple projects, how did you prioritize?

**I always create a list of tasks to complete each day and keep folders specifically designated for each issue and project. When assigned projects, I gather as much information as possible to garner what is needed to complete the project in a timely fashion.**

**Specifically, I always want to know i) when the project is due, ii) who the primary contacts are, and iii) what, ultimately, the client or assignor envisions for the final product.**

**Having lists, folders, and information readily available provides me with organization, efficiency, and the perspective necessary to see the big picture and ability to prioritize based on deadline, details, and completion time.**

20. Give an example of a time when you've been given an assignment that you didn't know how to do. Can you please tell how you approached the problem – how did you handle it?

**I have utilized several methods to tackle new assignments, such as research, brainstorming with a boss or colleague, and visualizing the end result, then breaking down the assignment step-by-step until the finished product is a reality.**

**Recently, I was asked to develop a report summarizing the organizational structure of certain, publicly-traded companies, which was not in my scope of expertise.**

**First, I utilized trustworthy, on-line resources that enabled me to find some of the data. However, the databases I was accustomed to using were not sufficient. Therefore, I met with the project lead, who was able to help me with some (but not all) of the companies.**

**We next spoke with the Akerman library staff who was able to help us find the relevant information for many of the remaining companies. For the final companies on the list, I reached out to some of my industry colleagues who were able to direct me to new resources, which enabled me to finalize the project.**

21. What do you feel would be the most common errors made in a position such as this?

**I believe juggling too many tasks could distract someone from paying the proper amount of attention needed for accuracy and a well-put together product, which could lead to poorly produced products.**

22. Is there anything else in your experience that you would like us to consider?

**I believe my significant experience traversing Florida government in both the public and private sector, my level of integrity and competency in this industry, and my ability to build and maintain strong, long-lasting, working relationships provides FHIAB with more than enough information needed to consider me as a viable candidate.**

**Further, in addition to my services, by contracting with Akerman FHIAB will have access to the resources of one of the strongest law firms in Florida. Akerman attorneys and consultants have significant experience in the health care and health insurance arenas and have experience with statutorily appointed boards. FHIAB would have the benefit of Akerman's collective knowledge and experience in performing my duties as Executive Director.**

***\*If needed, I am happy to supply references and answer any additional questions.***

**Hardee, Amy**

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**From:** Cathy Nelson <kczsnelson@msn.com>  
**Sent:** Wednesday, November 10, 2021 4:56 PM  
**To:** FHIAB  
**Subject:** Executive Director Position  
**Attachments:** FHIAB Executive Director Interview Questionnaire.doc

Hi,

Thank you for the opportunity to be considered for the Executive Director position at the FHIAB. Please find attached the completed questionnaire you requested. Feel free to reach out to me with any questions or concerns at 515-979-6001.

Kind regards,  
Cathy Nelson

## Hardee, Amy

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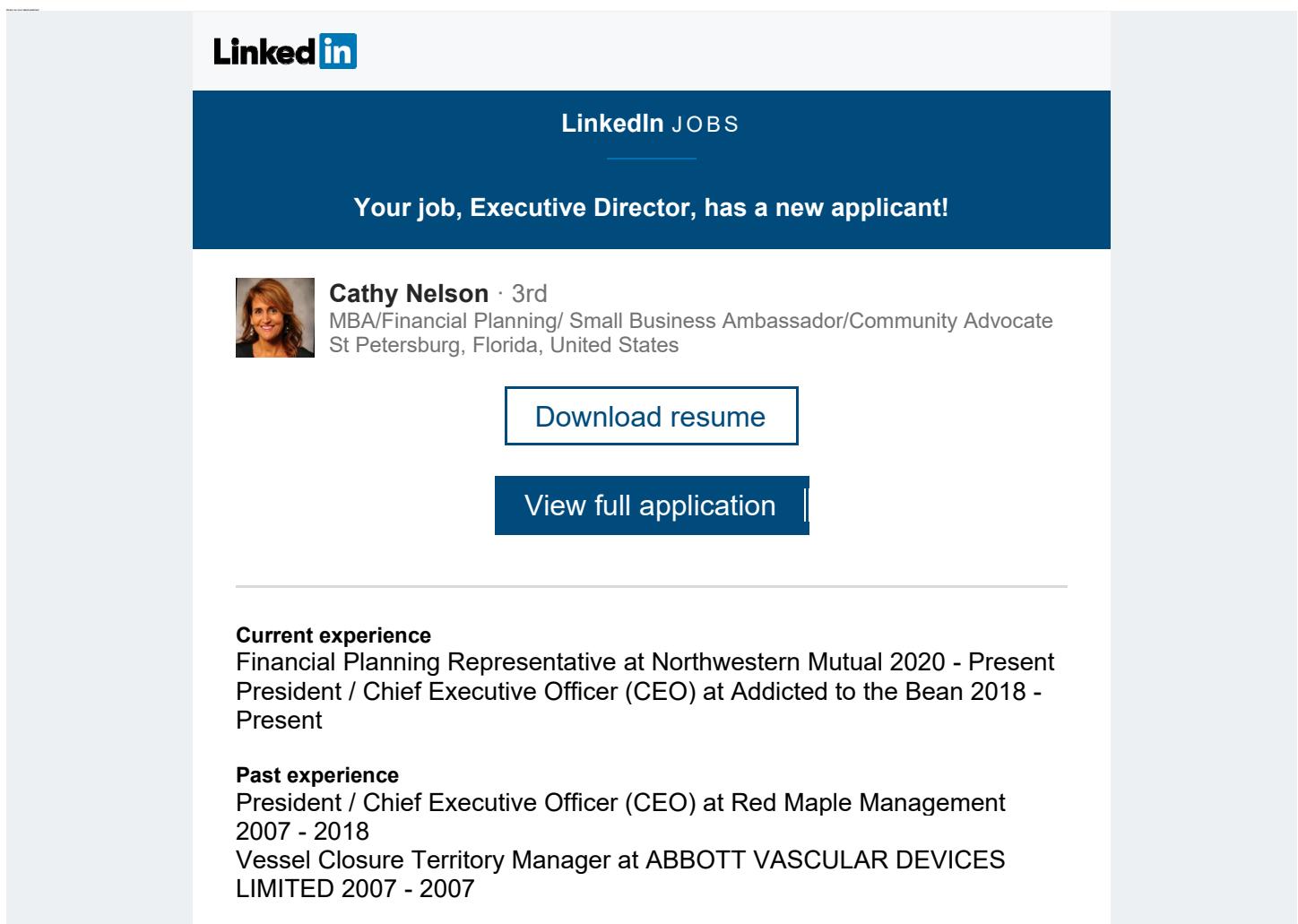
**From:** FHIAB  
**Sent:** Monday, November 8, 2021 12:27 PM  
**To:** kczsnelson@msn.com  
**Cc:** FHIAB  
**Subject:** RE: New application: Executive Director from Cathy Nelson  
**Attachments:** FHIAB Executive Director Interview Questionnaire.doc

Thank you for your interest in serving as the Florida Health Insurance Advisory Board's (FHIAB) Executive Director!

Please complete the attached Interview Questionnaire and send it back to me via reply e-mail by close of business, next Monday (November 15), to continue the application process. Once all responses are received, they will be sent to our Selection Committee.

---

**From:** LinkedIn <jobs-listings@linkedin.com>  
**Sent:** Monday, November 8, 2021 10:45 AM  
**To:** FHIAB <FHIAB@myfloridacfo.com>  
**Subject:** New application: Executive Director from Cathy Nelson



The image shows an email from LinkedIn Jobs. The subject line is "Your job, Executive Director, has a new applicant!" The email body contains a profile picture of a woman named Cathy Nelson, a 3rd-degree connection. Her title is "MBA/Financial Planning/ Small Business Ambassador/Community Advocate" and she is located in St Petersburg, Florida, United States. There are two buttons: "Download resume" and "View full application". Below the email, there is a section titled "Current experience" listing her roles at Northwestern Mutual and Addicted to the Bean. There is also a section titled "Past experience" listing her roles at Red Maple Management and ABBOTT VASCULAR DEVICES LIMITED.

**LinkedIn JOBS**

Your job, Executive Director, has a new applicant!

 **Cathy Nelson** · 3rd  
MBA/Financial Planning/ Small Business Ambassador/Community Advocate  
St Petersburg, Florida, United States

[Download resume](#)

[View full application](#)

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**Current experience**  
Financial Planning Representative at Northwestern Mutual 2020 - Present  
President / Chief Executive Officer (CEO) at Addicted to the Bean 2018 - Present

**Past experience**  
President / Chief Executive Officer (CEO) at Red Maple Management 2007 - 2018  
Vessel Closure Territory Manager at ABBOTT VASCULAR DEVICES LIMITED 2007 - 2007

Critical Care Specialist at The Medicines Company 2005 - 2007  
Senior Pharmaceutical Sales Representative at Berlex Laboratories Inc.  
(now Bayer Pharmaceuticals) 1998 - 2005  
Sales Representative at Bird and Cronin 1993 - 1998  
[+ See all](#)

**Education**

University of Iowa Tippie College of Business  
Drake University

**Skills matching your job**

Communication

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## Executive Level Management

Strategic Leadership • Financial Sales • Revenue Generation • Team Building & Inspiration

### EXECUTIVE SUMMARY

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**Senior Executive and Business Leader** with wide experience in pharmaceutical and medical device fields, expertly managing all functional areas to ensure continued efficiency and profitability. Business owner versed in taking new ideas to revenue growth. Drives authenticity in the workplace with confidence, integrity, and emotional intelligence.

**Extensive success in building productive long-term relationships** with particular expertise in leading a team to achieve goals and achieve synergy. Relationship builder who engages with all functions, understands stakeholder needs, and builds trust.

**Inspirational, charismatic leader and visionary** who brings unique value as a fierce advocate passionate about business causes with a talent for persuading the most challenging opponents. Expert in strategic planning and implementation with success driving revitalization and increased revenue generation while leading organizational change.

### Notable Achievements

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- **Revenue Generation:** Savvy business owner who built business to attain competitive advantage and record sales / revenue growth based on the ability to drive corporate direction and vision.
- **Growth Strategies:** Expanded revenue-generating activities and tripled size of business revenue.
- **Leadership:** Currently serve on the Board for Johns Pass Village Business Association and Alpha House of Pinellas County. Previously Served on the Board Foundation for Children & Families of IA, largest non-profit serving children and families.
- **Networking:** Dynamic networking professional dedicated to growing leadership presence and connecting successful businesses, exceptional people and tremendous results together.

### Core Competencies

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Entrepreneurial Leadership • Strategic Planning & Implementation • Financial Controls • Organizational Streamlining • ROI Business Operations • Revenue Growth • Contract Negotiations • Stakeholder Requirements • Customer Analysis • Nonprofits Project Management • Decision-Making • C-Suite Relationships • Performance Management • Microsoft Office • QuickBooks

### CAREER PROGRESSION

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#### Northwestern Mutual/ Financial Planner | 2020–Present

#### Sassy Investments, LLC | St. Petersburg, FL

Financial Planner who assists businesses and families within the Greater Tampa Bay area to define and achieve financial security. I rely not only on my own knowledge and experience, but also on the expertise of my team of specialists available through the Northwestern Mutual Network. Together, we can provide innovative solutions and professional direction to help clients accomplish their objectives.

#### President / Chief Executive Officer (CEO) | 2018–Present

#### Sassy Investments, LLC | St. Petersburg & Madeira Beach, FL

*Multiple retail shops & merchandise with locations in St. Petersburg & Madeira Beach, FL.*

CEO/Owner of multiple retail stores and associated merchandise. Oversee hiring, training, scheduling, payroll, advertising, HR, financial management, inventory and P&L.

- Drove rebranding and propelled a robust increase in merchandise sales by collaborating with marketing firm to redesign new logo and merchandise. Revamped, increased, and diversified product offerings; boosted brand awareness and visibility.
- Achieved robust organic sales growth of 67% at both Florida locations by scaling up hiring of quality employees. Maximized profitability by streamlining operations and slashing food costs through improved inventory processes.
- Achieved Nextdoor Neighborhood Favorite Award in 2018, 2019, 2020

**President / Chief Executive Officer | 2007–2018****Sassy Investments, LLC dba Red Maple Management | Urbandale, IA**

Sole owner of residential real estate management firm leading residential real estate and townhome / condo associations. Oversaw all financials associated with the business as well as P&L responsibility for multiple additional condo / townhome associations. Led financial management for townhome associations as well as for management firm. Attended all association meetings; scheduled work for capital expenditures; and oversaw billing invoices, assessments, accounts payable, budgeting, quarterly financials, and accounts receivable. Leased properties and processed applications. Managed customer relations, sales, marketing, and payroll.

- Secured management contract for the largest builder in the state of Iowa, a \$24,000 increase in revenue per year through networking and strategic relationship building.
- Reduced business-related costs by 31% within the first month through relocating office spaces to reduce rent, slashing all unnecessary expenses, and streamlining procedures and expenses.
- Key role in creating business value and additional revenue that increased cash flow 22% monthly by locating a solid multi-family property to purchase in a prime location near a large medical school and business hub. Increased value in the building as well as personal business within one year.

**Critical Care Specialist | 2005–2007****The Medicines Company | Des Moines, IA**

*A biopharmaceutical company focused on transformational solutions that address cardiovascular care.*

Worked in division dedicated to selling intravenous antithrombin medication that was still relatively new to the market for \$500M company. Tasked with persuading interventional cardiologists and radiologists to utilize an expensive intravenous drug versus a drug that cost significantly less to administer. Maintained budget and ROI responsibility.

- Achieved the most formulary approvals wins in assigned region and MVP 2006 by increasing quota attainment 50%.
- Successfully recruited and developed a new regional speaker from the University of Iowa who served as the Primary Investigator for a clinical trial on acute coronary syndrome. Secured attendance at speech of 10 high-performing, well-respected interventional cardiologists, an unprecedented achievement that garnered company recognition.
- Responsible for territory growth from 62% quota attainment in August 2005 to 112% attainment by March 2006.

**Additional Roles:**

- **Vessel Closure Territory Manager, Abbott Vascular.** Recruited to turn around an underperforming territory. Convinced interventional radiologists and cardiologists to utilize closure devices on their patients following PCI procedures. Trained physicians, residents, nurses, and recovery units on product usage and certification. Exceeded monthly sales targets quickly and increased territory rank from 108 among 121 reps to 17.
- **Senior Pharmaceutical Sales Representative, Berlex Laboratories Inc.** Promoted to Senior Sales Consultant. Received multiple sales achievement awards. Ranked first in district and third in area for new product launch.

**EDUCATION**

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**Executive Master of Business Administration**, University of Iowa, Iowa City, IA, 2018

**Bachelor of Arts in Mass Communications**, Drake University, Des Moines, IA

**Real Estate Broker's License**, Des Moines, IA, 2009–2018

**Sales Training** for Abbott Vascular, The Medicines Company & Berlex Labs

**MEMBERSHIPS & AFFILIATIONS**

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Board Member, Johns Pass Village Business Association, 2020–Present

Board Member, Alpha House of Pinellas County, 2020–Present

Committee Member, Kidsfest, 2017–2018

Fundraising Committee Member & Foundation Board Member, Children & Families of Iowa, 2017–2018

Court-Appointed Special Advocate, Des Moines, IA, 2014–2018

BBB Member & Chamber of Commerce Member, 2008–2018

# Florida Health Insurance Advisory Board (FHIAB)

## Executive Director (ED) Interview Questions

**Candidate Name:** Cathy Nelson

1. Please tell me about your recent work experience(s). I have served as COO for the last 13 years with two different companies, which I owned, in two different industries. My experience in these roles has positioned me to comfortably adapt quickly, pivot in uncertain situations, apply strategic direction expertise, gain leadership skills and exercise business knowledge that is based on data analyses, effective human capital management and high-level budgeting and profit and loss expertise.
2. If you were to get this position, would you have other employment as well? No, this role would be my one primary focus.
  - a. If yes, then: Do you currently work for another entity that would present a conflict with this position? N/A
  - b. What is your understanding of this position and what skills do you bring to the position?  
It is my understanding that this position requires administrative support and preparation for the FHIAB board meetings and works to ensure that the operation of the FHIAB board runs efficiently and effectively. This means preparing financial statements, prepping for meetings by preparing agendas, meeting minutes, arranging physical facilities details, and giving proper advanced notice of meetings.  
In addition, the role entails closely monitoring current events and reporting to the Board, assisting the Board in developing recommendations in legislation pertaining to the Florida health insurance marketplace. The role also entails preparing the FHIAB annual Board report, annual health insurance market report and any other reports that may be required by statute or directed by the Board.

Finally, it is necessary to coordinate with the Florida Office of Insurance Regulation regarding uploading information (i.e., Florida Channel tapes, meeting information including agendas & minutes, etc.) to the FHIAB website.

**c. What skills do you bring to the role?**

The skills I bring to this position are an expertise in finance, bookkeeping and other skills necessary to track and manage an operating budget. In addition, I have excellent professional written and verbal presentation skills as well as strong interpersonal skills, including the ability to communicate effectively and develop and maintain strong interpersonal relationships.

My familiarity in the steps necessary to prepare for meetings is key. My comfort level in budget preparation, agenda setting, facilities arrangements, giving proper advanced notice and drafting memos is a valuable asset and would allow me to hit the ground running.

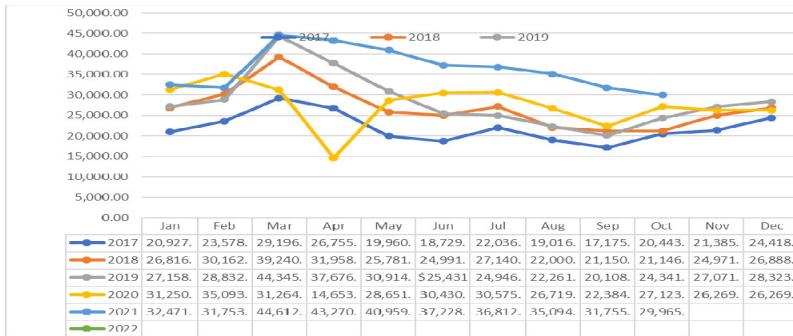
Finally, my greatest attribute is the ability to work independently without supervision to accomplish essential duties. My self-starter, industrious work ethic has served me well throughout my career and I excel when pushed by deadlines despite working autonomously.

**d. Please describe your computer skills and what type of software you are experienced with.**

My comfort level working with computers is very high. My skills entail working often with MS excel, MS word, and Outlook. I am also comfortable working with presentation formats such as Powerpoint, Canva and sales CRM programs. In addition, I am well versed in Zoom and Google Teams to conduct online meetings and share information.

3. This role requires some data analysis to be performed in Excel. Are you comfortable using Excel and performing basic data analysis? Yes, I am very comfortable working within excel and performing basic data analysis.

4. Please describe some data analysis you have performed in Excel. Below you will see an example of the analysis that I performed for a recent role. It was to visually demonstrate what growth looked like for a recent investment. Looking at numbers doesn't have quite the same impact as sharing it visually, so one can appreciate the nuances of the cyclical nature of the business. Please see graph below for example. In addition, I have performed analyses which illustrates year over year growth, percentage increases, decreases in revenue and profitability.



5. What is your budgetary experience? I have been preparing and constructing budgets for over 13 years for myself, my personal business' and also other real estate entities such as homeowners associations. I am very comfortable with the budgeting process and feel confident being able to run financials properly for any entity.

6. Are you aware of Florida's Sunshine laws and meeting notice requirements? Yes

7. Have you ever set-up a meeting from beginning to end? Please describe. I am very accustomed to setting up meetings from start to finish for multiple associations every year for 10 years at least quarterly with annual meetings as well. This was an integral part of my previous role as COO for an Association management business I owned. I would send out and post notices of meetings, arrange meeting venues, prepare and post meeting notices where necessary with the proper advanced notice, prepare financials, budgets, voting ballots, agendas and minutes (pre and post). I am completely comfortable with all the processes and procedures for executing successful meetings.

8. Are you familiar with Florida's laws regarding health insurance and HMOs? Yes

9. In your opinion, what is the biggest issue with the health insurance industry? I believe the biggest challenge today is healthcare policy. The sheer number of laws and regulations to repeal, replace, modify current healthcare policies in addition to the ebb and flow of political uncertainty and lack of a disciplined regulatory process. There are so many nuances in Medicare-for-all, Single payer, Medicare/Medicaid buy-in, block grants, surprise billing, provider directories, association health plans and short-term policies. The complexities are seemingly insurmountable, and a sweeping overhaul of the entire healthcare systems seems beyond the realm of possible at times.

10. What do you see as pros and cons of health care reform? The pros of healthcare reform are to turn challenges into opportunities which means reducing costs for all players in the healthcare arena, being able to better predict costs, making procedural costs transparent which will help involve patients and motivate them to making better, healthier choices for themselves and their family. The cons are that accurately predicting costs has become a maze of complexity and may lead to further market confusion for consumers. In addition, leveraging advanced analytics to improve health outcomes and predict costs can create a layer of vulnerability in cybersecurity and create patient privacy concerns.

11. Please describe what you know about the current Florida health insurance markets? *Although I am likely oversimplifying this complex market, my understanding is there are individual policies (which are guaranteed), small group policies for businesses and large group policies for the largest employers. In addition, the state and federal governments have the healthcare safety nets; Medicaid for the disadvantaged and Medicare for the elderly.*

12. What experience do you have drafting letters/memos to executive leadership or legislative bodies? *(The ED will be preparing meeting agendas, Chair's remarks, and drafting legislative proposals.) I have over ten years of experience drafting letters/memos to boards and executives. I have no experience drafting letters/memos to legislative bodies.*

13. Please understand that the ED is not to push the committee beyond its current scope and operation or as a platform to try and generate more business for themselves. Are you comfortable with the current scope and the constraints? I am very comfortable with the scope and constraints of the FHIAB and am in the fortunate position to learn and appreciate being able to be a front row spectator of the advisory role that the FHIAB plays in the Florida healthcare arena.

14. Describe a tough problem that you have dealt with. Tell how you approached it and the outcome. As an owner of multiple retail stores, surviving the pandemic was a true challenge. I approached it with the belief that my local customers needed to continue to have a safe place to congregate and benefit from a small dose of social interaction, since churches and all other community organizations were ordered to be shuttered. Having to balance my concern for my employees' health and wellbeing, with the needs of the community was a choice I struggled with. Ultimately, I made the choice to stay open with whatever skeleton crew was willing to help and kept the stores open throughout the entire pandemic. The outcome was an outstanding amount of support and generosity from our local patrons happy that we chose to stay open throughout 2020 and they have returned that favor by blessing the business with incredible revenue since last June.

15. Describe two improvements you have made in your job in the past six months. The first thing I did was replaced our point of sale system which was incredibly time intensive and very heavily reliant on properly training employees how to utilize it. This was a tall task it wasn't easy but was well worth the time investment. The other improvement I made was to reevaluate and requalify all my vendors. The pandemic has taught me that not everyone heads off or foresees supply chain challenges, so I proactively reassessed all my vendors, interviewed them to find out what their contingency plans are in case they experience a supply chain breakdown and reallocated resources to those that seemed best prepared to handle the unexpected.

16. Tell about a decision you made that your supervisor disagreed with. How did you handle it? When I was selling arterial closure devices for Abbott Vascular, we were taught to be laser focused only on the physicians currently practicing as interventional radiologists and cardiologists. My manager was very vocal about this and maintained that we should avoid medical residents as it would slow down our sales cycle. I respectfully disagreed with him, shared my opposing opinion, and went

onto gaining many new sales because I included residents when teaching deployment techniques, who were happy to learn the new technology and were instrumental in persuading the more senior physicians to make the change. After that, my manager began preaching to his entire team that teaching residents was a worthwhile investment in our product's growth and acceptance.

17. When you worked on multiple projects, how did you prioritize? I look at the scope and depth of each project and estimate the length of time each section of the project will take. Based on those time estimates, I create a schedule to ensure that my timeline allows for delays and revisions and is still complete in a timely, professional manner. In business or life, I am not a fan of procrastinating.

18. Give an example of a time when you've been given an assignment that you didn't know how to do. Can you please tell how you approached the problem – how did you handle it? I recall in grad school, which is fairly recent for me, I had some assignments that were out of my comfort area. I approached the situation in three ways; Initially, if it was possible to look it up guidance online, I would do that first. If that failed to give me enough information, I asked the professor as soon as possible. If I still didn't understand I would go to one of my cohort teammates or the entire group to get direction on how they viewed the assignment should be approached. That process seemed to flush out the information I needed to get the assignment done.

19. What do you feel would be the most common errors made in a position such as this? I think the most common error in this type of position is judgement error in properly crafting memos and legislative verbiage because writing and selecting proper wording can be subjective. Anytime you introduce a task to a human which isn't inherently objective, you create the potential for subjectivity and a lapse in judgement. The other potential for error in this position is time management. This position demands very efficient, effective time management.

20. Is there anything else in your experience that you would like us to consider? My years of wisdom as a business owner, experience in multiple leadership positions, years of volunteer board service, effective time management skills, expertise in preparing for meetings as well as my joyful cooperation and professional, yet energetic demeanor are all reasons, I would make a great fit for this position.

**People buy into the leader before they buy into the vision.”**

--John C. Maxwell

## Hardee, Amy

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**From:** FHIAB  
**Sent:** Tuesday, November 23, 2021 8:46 AM  
**To:** keith@associationcfo.com  
**Cc:** FHIAB  
**Subject:** RE: New application: Executive Director from Keith Dean

Your submission was received. No additional information is needed at this time.

Also, I do not expect any action to be taken until after the holidays.

---

**From:** keith@associationcfo.com <keith@associationcfo.com>  
**Sent:** Tuesday, November 23, 2021 8:19 AM  
**To:** FHIAB <FHIAB@myfloridacfo.com>  
**Subject:** Re: New application: Executive Director from Keith Dean

Good morning,

I wanted to confirm this submission was received last week and also see if there is any additional information I can provide.

Thanks,

Keith

A. Keith Dean, CPA  
(850) 980-3745

On Nov 16, 2021, at 3:59 PM, [keith@associationcfo.com](mailto:keith@associationcfo.com) wrote:

Please see attached responses to Interview Questionnaire

Thank you for your consideration,

Keith Dean, CPA  
850-090-3745

Sent from [Mail](#) for Windows

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**From:** FHIAB <[FHIAB@myfloridacfo.com](mailto:FHIAB@myfloridacfo.com)>  
**Sent:** Tuesday, November 9, 2021 10:06:51 AM  
**To:** [keith@associationcfo.com](mailto:keith@associationcfo.com) <[keith@associationcfo.com](mailto:keith@associationcfo.com)>  
**Cc:** FHIAB <[FHIAB@myfloridacfo.com](mailto:FHIAB@myfloridacfo.com)>  
**Subject:** RE: New application: Executive Director from Keith Dean

Thank you for your interest in serving as the Florida Health Insurance Advisory Board's (FHIAB) Executive Director!

Please complete the attached Interview Questionnaire and send it back to me via reply e-mail by close of business, next Tuesday (November 16), to continue the application process. Once all responses are received, they will be sent to our Selection Committee.

---

**From:** LinkedIn <[jobs-listings@linkedin.com](mailto:jobs-listings@linkedin.com)>

**Sent:** Monday, November 8, 2021 2:28 PM

**To:** FHIAB <[FHIAB@myfloridacfo.com](mailto:FHIAB@myfloridacfo.com)>

**Subject:** New application: Executive Director from Keith Dean

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**LinkedIn**

**LinkedIn JOBS**

**Your job, Executive Director, has a new applicant!**

 **Keith Dean** · 2nd  
Chief Executive Officer at Emerald Coast Association of REALTORS®  
Tallahassee, Florida, United States

[Download resume](#)

[View full application](#)

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**Current experience**  
Chief Executive Officer at Emerald Coast Association of REALTORS®  
2015 - Present  
Executive Director at FLORIDA DEPUTY SHERIFFS ASSOCIATION INC  
2008 - Present  
CFO at Florida TaxWatch 2010 - Present  
Consultant at Florida Sheriffs Association 2008 - Present  
Managing Principal at Association CFOS and Consultants 2007 - Present

**Past experience**  
Chief Financial Officer at Florida Network of Youth and Family Services  
2008 - 2018  
Chief Financial Officer at Florida Home Builders Association 2002 - 2007  
[+ See all](#)

**Education**  
Florida State University

**Skills matching your job**  
Accounting· Budgeting· Finance

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<FHIAB Executive Director Interview Questionnaire.doc>

## EXECUTIVE PROFILE

### ENTREPRENEURIAL LEADER – CRITICAL THINKER – DYNAMIC STRATEGIST – TRUSTED ADVISOR

Performance- and results-driven executive with a career marked by 20 years of success in multimillion-dollar association and not-for-profit executive management. Influential partner with expertise in financial analysis and economic strategy; respected for providing critical financial leadership and strategic insights to executive teams and boards. History of solid financial infrastructures, operational efficiencies, and strong revenues. Excel in establishing objectives and implementing strategies that drive change, increase growth, and maximize profitability.

- **Transitioned Florida Deputy Sheriff's Association** from concept to a thriving operation. Pioneered model program; approached by executive leadership from other state associations to adopt and replicate the program.
- **Increased Emerald Coast Association of Realtors' membership by 73%;** grew from 2,600 to 4,500.
- **Founded Association CFOs and Consultants, multimillion-dollar consulting practice** that focused on running association/nonprofit fiscal operations; expanded to a full association management services operation.

#### AREAS OF EXPERTISE

- Financial Planning
- Investment Analysis
- Operations Oversight
- Operational Efficiency
- Business Management
- Business Development
- Strategic Planning & Vision
- Systems & Internal Controls
- Financial Analysis & Reporting
- Board Relations & Governance
- Contract Terms & Negotiations
- Team Leadership & Development
- Grants & Contracts Administration
- Annual Budget Planning & Strategy

*Dynamic executive with unparalleled success collaborating effectively with boards. Critical thought leader and advisor with fiscal and operational acumen, as well as expertise in strategic plan development, implementation, and problem resolution.*

## PROFESSIONAL EXPERIENCE

EMERALD COAST ASSOCIATION OF REALTORS, Santa Rosa Beach, FL

2015-Present

### Chief Executive Officer

Establish ambitious business strategies, set operational objectives, and cultivate business development opportunities for this association serving members across the southeast. Lead a team of 13 in delivering service to more than 4,500 members. Design innovative programs that impact business performance, member satisfaction, and service offerings. Pinpoint untapped opportunities aligned with real estate policy issues, regulations, and emerging trends to achieve optimal revenue growth. Serve as an ex-officio board and committee member; engage in rewriting bylaws, policies, and procedures. Oversee continuing education curriculum and professional development courses to ensure alignment with emerging trends and member requirements.

### Selected Achievements

- Devised and implemented strategies that increased the association's membership from 2,600 to 4,500/73%.
- Instituted new non-dues revenue streams, which included adding a pre-licensing school to support new agents and brokers.
- Generated additional non-dues revenue after implementing a regional professional designation training conference that was attended by agents across the southeast.
- Implemented a comprehensive affiliate-member sponsorship program to generate non-dues revenue.
- Developed strategic alliances with key local government officials; educated officials and played an instrumental role in defeating proposed industry-crippling ordinances.
- Planned and directed major facility improvements, which included building a second full-service facility, renovating the original location and establishing a third full-service facility.
- Remained in close contact with members by producing high-impact e-newsletters, website content, social media, and local and industry publications.

FLORIDA DEPUTY SHERIFF'S ASSOCIATION, Tallahassee, FL

2007-2015

### Executive Director

Set objectives and lead a high-performing team charged with delivering service to upward of 15,000 members across the state. Devise a series of programs that drive business performance, member satisfaction, and service offerings. Generate opportunities focused on member policy issues, regulations, and emerging trends to maximize revenue growth. Identify and implement insurance benefits and scholarship programs that align with members' requirements. Serve as an ex-officio board member.

**Selected Achievements**

- Recognized as the expert who successfully architected and grew this organization into a highly-professional association that is considered a prototype across the country. Approached by executive leadership from associations across the US to model the comprehensive program.
- Innovated a legal fund and cultivated relationships with attorneys to provide on site representation to association members for matters related to shootings, use-of-force, and internal affairs hearings.
- Developed and delivered regional training to members and their agency staff at locations across Florida.
- Invited to speak at industry trade shows; represented the organization in recruiting new members, generating interest, and increasing awareness.
- Established a philanthropic fund that provides immediate assistance to members in need after family emergencies, injuries, natural disasters, and medical issues. Executed fundraising campaigns and events; manage the philanthropic fund.
- Worked with industry partners, including suppliers of radio equipment, commissary management, and firearms to sponsor events and provide non-dues revenue.
- Produced relevant e-newsletters, industry publication articles, website, and social media updates that informed association membership.

ASSOCIATION CFOS AND CONSULTANTS, State-Wide, FL

2005-2015

**Managing Principal**

Founded this consulting practice to provide fiscal operations services to associations and nonprofits; led team of 10 in transforming to a full association management services organization. Manage all aspects of annual budget, resources, facilities, vendor contracts, and financial activities, including payroll, accounts receivable, and accounts payable. Devise policies and procedures to maximize internal control, operational efficiencies, and ensure sound investment management. Identify and implement national insurance programs. Serve as an ex-officio board member on client associations. Work in collaboration with client attorneys, auditors and insurance, banking, and IT professionals. Establish and manage foundations in support of association clients and trusts for nonprofit clients.

**Selected Achievements**

- Wrote and successfully managed the operations and reporting of more than \$500 million in federal, state, and local grants.
- Represented the association while holding statewide member training conferences and tradeshows across the state.
- Leveraged expertise to deliver 150+ “unqualified opinion” or “clean” annual, independent audits and program audits to OPAGGA, Department of Financial Services, and Florida Inspector General.
- Set up and administer industry-specific political action committees (PACs) on behalf of association clients; filed required reports with local, state, and federal regulatory agencies.
- Lobbied state and federal legislators and agencies.
- Developed and delivered continuing education classes on member license recertification as an instructor qualified by the Department of Business and Professional Regulation.

**PARTIAL CLIENT LIST**

Florida Independent Spirits Association, Executive Director, 2015-Present

Florida Assisted Living Association, Interim CFO, 2013-2014

Capital Medical Society, CFO, 2012-2016

Florida Head Start Association, Executive Director, 2012-2015

Florida Alcohol &amp; Drug Abuse Association, Interim CFO/Consultant, 2011-2012

Southern Scholarship Foundation, CFO, 2011-2018

Florida TaxWatch, CFO, 2009-Present

Florida Network of Youth and Family Services, CFO, 2008-2018

Florida Sheriff's Association, Consultant, 2008-Present

**EDUCATION & PROFESSIONAL DESIGNATIONS**

FLORIDA STATE UNIVERSITY

**Bachelor of Science****Post-Graduate Degree in Accounting**

FLORIDA STATE UNIVERSITY

**Supervising Instructor, Political Science Course (PAD 3941) Political Action Committees and Committees of Continuous Existence****PROFESSIONAL AFFILIATIONS**

State Legislative Committee Member | Nonprofit Subject-Matter Expert, Florida Institute of Certified Public Accountants (FICPA)

**COMMUNITY INVOLVEMENT**

Audit Committee Chairman, Big Bend Hospice

Treasurer of the Board of Directors, Capital Area Chapter of the American Red Cross

Treasurer of the Board of Directors, Florida Smart Justice Alliance

Board of Directors Destin Charity Wine Auction

## **Florida Health Insurance Advisory Board (FHIAB)**

### **Executive Director (ED) Interview Questions**

**Candidate Name:** Keith Dean, CPA

1. Please tell me about your recent work experience(s).

I serve as the Chief Executive and manage all aspects of the organization including noticing and preparing everything for Board and committee meetings, accomplishing the action items and other follow-up after the meeting, managing the budget and ensuring that all state and federal filings are made timely. I also prepare and present timely financial statements, manage all vendors and meet the directives of the strategic plan. I work with the organization's general counsel and serve as the point of contact for the independent auditors. Most importantly, I serve as a resource to the Board members and stakeholders.

2. If you were to get this position, would you have other employment as well?

I will have other Board advisory positions but will reduce a portion of my current employment to accept this opportunity

- a. If yes, then: Do you currently work for another entity that would present a conflict with this position?

I have no conflicts currently and will discuss with the Board before accepting potentially conflicting work.

3. What is your understanding of this position and what skills do you bring to the position?

This appears to be a very high-profile Board that needs a strong administrator who, as the sole staff person, needs to have diverse experience in running all aspects of an organization. The successful candidate should have insurance industry experience paired with the basics of setting up and administering meetings and the follow through after the meeting. The executive director should also have a strong fiscal and reporting background. The right candidate needs to be reasonably tech savvy and have all the experiences of running a one-staff member organization from start to finish. I would bring all of these skills and many others to the position.

4. Please describe your computer skills and what type of software you are experienced with.

I am proficient with the Microsoft Office suite, Adobe, Zoom, QuickBooks, Sage and all other accounting software.

5. This role requires some data analysis to be performed in Excel. Are you comfortable using Excel and performing basic data analysis?

I am proficient in excel and use it several times a week. This is a critical tool in managing all size budgets, forecasting and data analysis.

6. Please describe some data analysis you have performed in Excel.

“What if” analysis with multi-factor comparisons and using dependent variables to build complex models such as increases in particular revenue and the corresponding variable cost related to that revenue. For example, projecting an increase in membership has to consider the corresponding increase in direct member cost such as a per member user fee for an app or a member benefit covered by an insurance policy.

7. What is your budgetary experience?

I have an incredibly diverse budgetary experience. I have developed and managed budgets for startups, for organization's experiencing during rapid growth and downturns, and in ranges from \$150,000 to over \$30 million.

8. Are you aware of Florida's Sunshine laws and meeting notice requirements?

I am. I have worked with several large government funded organizations and a special taxing district all of which required public notice of their Board meetings and other meetings of two or more of the Board members.

9. Have you ever set-up a meeting from beginning to end? Please describe.

Yes, I have set up meeting from start to finish for committees, large and small Boards which includes:

- a. Determining the best time for attendees or following the regularly scheduled date/time
- b. Public Noticing the meeting when required, noticing the Board members and sending reminder messages. Setting up video or telephonic conferencing if needed.
- c. Preparing the agenda with the Board Chair and with input from the Committee Chairs reporting to the Board at the next meeting.

- d. Preparing the Board packet to include the agenda, minutes from the previous meeting, financials, action items, committee reports and budget requests and any other documents for the Board to consider for approval.
- e. Advise on parliamentary procedure, collaborate with Board's general counsel and have professional advisors to advise Board when considering complex opportunities.
- f. Take minutes, take roll and prepare draft minutes for Board approval at the next meeting. Provide for recording if required.

10. Are you familiar with Florida's laws regarding health insurance and HMOs?

As a CEO, CFO and employer I have to understand these laws and the difference in the options when evaluating my employees' benefits packages to secure the best mix of coverages for the available budget.

11. In your opinion, what is the biggest issue with the health insurance industry?

Availability and affordability

12. What do you see as pros and cons of health care reform?

It depends on the reform. If the right stake holders, from carriers and employers to providers and patients, are involved, the reform can be positive. Ultimately the goal has to have components of being:

- 1. Affordable plans with benefits the beneficiaries actually want
- 2. Profitable enough for the carriers to enter and/or stay in the market
- 3. Flexible so that service providers actually want to accept insurance

13. Please describe what you know about the current Florida health insurance markets?

The markets appear to be tightening a bit. The employer whose benefits I manage has had significant plan changes 2 of the last 4 years and although the employer costs have only increased moderately, the copays have increased significantly and the benefits have decreased. Even with these changes, it's still the best option available.

14. What experience do you have drafting letters/memos to executive leadership or legislative bodies? (*The ED will be preparing meeting agendas, Chair's remarks, and drafting legislative proposals.*)

I have experience drafting letters, memos and legislative proposals as well as speaking to legislators as a body and in smaller local delegations to both inform and

to advocate. I have even more experience draft talking points for members and organization leaders to deliver our message to their local legislators during Capitol visits or back home in the District Offices.

15. Please understand that the ED is not to push the committee beyond its current scope and operation or as a platform to try and generate more business for themselves. Are you comfortable with the current scope and the constraints?

I am comfortable with the scope and constraints

16. Describe a tough problem that you have dealt with. Tell how you approached it and the outcome.

I had a vendor for member legal services that despite having the infrastructure in place including a hotline and attorneys already on staff, they could not deliver the contracted services to the members. After a written corrective action plan and a second significant failure, I had to create from scratch a resource that would meet our members needs. I created with our own “hotline” by contracting with an established 24/7 answering service. Next, I contracted directly with attorneys with the legal expertise needed by the membership. The final step was drafting scripts for the answering service staff with expected call-in questions or statements from the membership so the staff can transfer the calls to the attorney having the expertise needed for that particular caller. This resource is still utilized by the members.

17. Describe two improvements you have made in your job in the past six months.

Last month, I participated in a 3-day executive level public speaking training with Speakeasy International to enhance my experience in public speaking and hone my ability to craft the right message for a clear and succinct delivery.

I developed a member benefit app that puts all of their members resources in one place and provides a portal for committee member collaboration in between meetings.

18. Tell about a decision you made that your supervisor disagreed with. How did you handle it?

My supervisor in recent years have been the Board of Directors. My charge is to provide my opinion but ultimately to carry out the direction from the Board of Directors. In the real estate industry, Zillow has a superior and intuitive public data base for housing but had horribly out of date data versus our privately owned MLS used by Realtors having the most current data. When Zillow requested a data feed from our MLS in order to have better data, I advised against it. I felt strongly that Zillow would end up being a competitor with Realtors. Ultimately my Board agreed to

release the data to Zillow as it would in the immediate future, help promote their listings. Regardless of my opinion, I accepted that decision and collaborated with Zillow on a data feed from our MLS to their platform.

19. When you worked on multiple projects, how did you prioritize?

I schedule every project annually, monthly and weekly. I prioritize daily and often reprioritize during the same day. I begin each day with what needs to happen that day and end each day making sure it happened. External deadlines especially when connected to funding always have the highest priority but I remain flexible to attend to the new priority that pops up unexpectedly....because they always do.

20. Give an example of a time when you've been given an assignment that you didn't know how to do. Can you please tell how you approached the problem – how did you handle it?

I have a great peer network that I can ask questions and seek advice from other professionals in my industry. I often ask my peers if they've worked on a similar assignment when it is something I have not done before.

And then, I just dive in. I have found for me, the best way to determine how to do something is trial and error and often in this process, the path will present itself once you are immersed in the project.

21. What do you feel would be the most common errors made in a position such as this?

I feel the most common error in this position would be not asking enough of the right questions and as a result, venturing away from the scope of the position and of the Board's mission.

22. Is there anything else in your experience that you would like us to consider?

I bring over 20 years of insurance experience with Florida Homebuilders insurance programs, the Florida Sheriffs Risk Management Fund, the Florida Sheriffs Multiple Employers Trust and the Florida Deputy Sheriffs Insurance programs. I have worked on health insurance programs for associations and managed health benefits as an employer for over two decades. I will also bring my fiscal acumen as a CPA and over 20 years as the chief administrator of nonprofit, professional association, NGO and government boards. I have the demonstrated skill set and broad experience to not just meet but exceed your expectations as your executive director.

## Hardee, Amy

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**From:** John Trombetta <jtrombet@gmail.com>  
**Sent:** Monday, November 22, 2021 5:52 PM  
**To:** FHIAB  
**Subject:** Re: New application: Executive Director from John Trombetta  
**Attachments:** FHIAB Executive Director Interview Questionnaire copy copy.docx

Hello,

Attached is the completed questionnaire. Thank you for your consideration.

Best,

John Trombetta  
706-308-9031

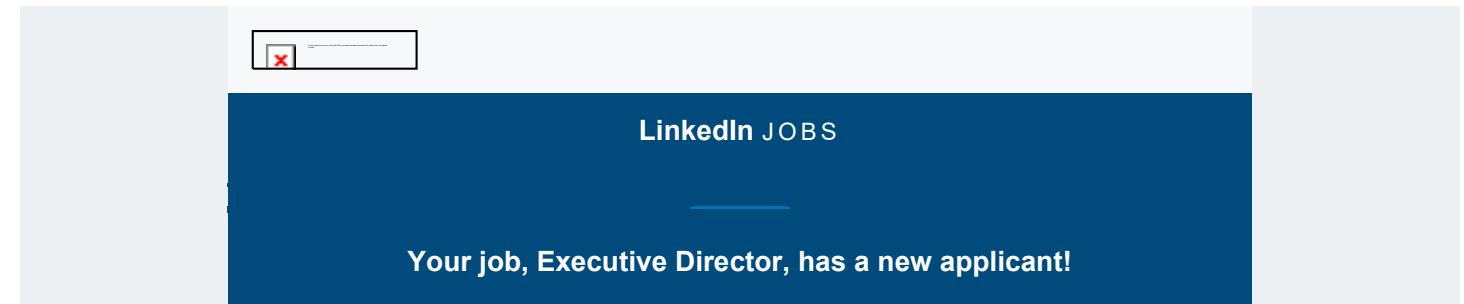
On Mon, Nov 15, 2021 at 10:43 AM FHIAB <[FHIAB@myfloridacfo.com](mailto:FHIAB@myfloridacfo.com)> wrote:

Thank you for your interest in serving as the Florida Health Insurance Advisory Board's (FHIAB) Executive Director!

Please complete the attached Interview Questionnaire and send it back to me via reply e-mail by close of business, next Monday (November 22), to continue the application process. Once all responses are received, they will be sent to our Selection Committee.

---

**From:** LinkedIn <[jobs-listings@linkedin.com](mailto:jobs-listings@linkedin.com)>  
**Sent:** Sunday, November 14, 2021 12:31 AM  
**To:** FHIAB <[FHIAB@myfloridacfo.com](mailto:FHIAB@myfloridacfo.com)>  
**Subject:** New application: Executive Director from John Trombetta





**John Trombetta** · 3rd  
Executive Director at The Alzheimer's Project, Inc.  
Tallahassee Metropolitan Area

[Download resume](#)

[View full application](#)

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**Current experience**

Executive Director at Alzheimer's Project, Inc. 2020 - Present

**Past experience**

President/CEO at Florida State Alliance of YMCAs 2016 - 2020  
Vice President at Florida State Alliance of YMCAs 2016 - 2020  
Vice President Operations at Florida Alliance of YMCAs 2016 - 2020  
Regional Director of Development at University of Georgia 2015 - 2020  
Sr. Development Officer at Florida State University 2012 - 2015  
Director of Alumni Relations at Valdosta State University 2008 - 2012  
Loan Acquisitions Manager at Walter Mortgage Company 2003 - 2008  
Sales Rep at Alpha Data Systems 1999 - 2001

[+ See all](#)

**Education**

Valdosta State University  
Bachelor's degree, Political Science and Government 1995 - 2001  
Florida State University  
Troy State University

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**John Trombetta**  
1503 Belleau Wood Dr  
Tallahassee FL 32308  
(706) 308-9031

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**EDUCATION** Valdosta State University, Valdosta, GA- BA, Political Science, 2001  
University of Phoenix, Phoenix, AZ- MBA, 2004  
Valdosta State University, Valdosta, GA- Ed.D. Educational Leadership (Anticipated Graduation-Summer 2022)

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**EMPLOYMENT HISTORY**

**Alzheimer's Project, Inc.** *Executive Director*

June 2020- Present

- Manage day to day operations including HR, Fundraising, Budget and Finance
- Manage 15 Person Board of Directors
- Write all grant applications and proposals for service
- Manage advocacy and legislative requests
- Manage *AmeriCorps/LegacyCorps* Program for Veterans
- Manage *Bringing the Lost Home* Law Enforcement training
- Serve on Big Bend Dementia Care and Cure Initiative Task Force
- Serve on Advocacy Committee of United Partners for Human Services

**S. Sutton and Associates**- *Associate*

May 2020- Present

- Work with team members to implement successful fundraising strategies
- Participate in national thought sessions to help drive creative solutions around fundraising and non-profit management
- Develop a pipeline of business for the company

**Hill City Companies**- *President*

May 2020- Present

- Perform commercial and residential underwriting inspections
- Manage client relations
- Analyze data to determine project worthiness
- Develop industry contacts and awareness for potential growth opportunities

**Florida State Alliance of YMCAs & Foundation**, *CEO & President*

November 2016-March 2020

- Create and manage budgets for the Alliance (\$450,000 19/20) and the Foundation (\$1.8m)
- Manage the grant and program delivery for four programs
- Hire and Manage staff of five
- Lead Advocacy efforts at the state level including managing outside lobbyist counsel
- Develop and maintain relationships with YMCA CEOs from across the state-
- Develop and maintain relationships with external partners including local hospital system, state agencies and funding organizations.

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**EMPLOYMENT HISTORY (cont.)**

**University of Georgia, *Regional Director of Development***

September 2015- November 2016

- Represent University Development Efforts in 5 Key Cities
- Manage major gift prospects and donors within assigned territory
- Arrange visits between donors and high level university officials
- Assist college level fundraisers by identifying prospective donors
- Host major gift prospects and donors at academic, social and athletic events

**Florida State University, *Senior Development Officer***

July 2012-September 2015

- Target donors for gifts of \$100,000 or more
- Manage relationship with academic departments and FSU Foundation
- Assist with Dean's Advisory Board appointments and bi-yearly meetings
- Keep detailed records of meetings and contacts with donors in Raisers Edge
- Assist in developing department and college-wide Campaign Initiatives
- Coordinate donor visits and hospitality

**Valdosta State University, *Director of Alumni Relations***

February 2008-July 2012

- Manage VSU Alumni Association Board including monthly meetings, minutes, appointments and elections.
- Manage an office staff of 2 professionals and 4 students
- Manage Alumni budget of \$500,000 including investments, state appropriation and foundation appropriation.
- Manage volunteer chapter leadership remotely
- Manage Alumni Programs including Homecoming, Local Area Receptions & Events
- Manage Alumni affinity programs and outside partnerships
- Successfully started first Alumni Chapter (Golden Isles, GA). After that, started other chapters in other cities (Atlanta, Macon) and through on-campus groups (ROTC)
- Assisted in the start-up and continuation of the VSU Gala fundraiser
- Manage publication and budget of the Alumni VOICE Magazine (2 issues yearly)
- Serve on various University Committees as Alumni Representative

**Walter Mortgage Company, *Loan Acquisition Specialist- Tampa, FL***

December 2005- February 2008

- Create and market new loan products and business opportunities
- Managed marketing staff in Ft. Worth. TX
- Establish relationships with Mortgage Bankers and Builders to bring in business
- Perform loan level due diligence on loans to be purchased
- Analyze and review performance of loans purchased

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#### **EMPLOYMENT HISTORY (cont.)**

**Walter Mortgage Company, Property Manager**  
February 2004- December 2005  
-Manage staff of 12 Regional Field Personnel  
-Hire and supervise all legal representation for the region  
-Serve as the Company Representative in all legal disputes  
-Manage all REO inventory and litigated properties in the region  
-Serve as departmental representative in company-wide initiatives

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#### **HONORS & ACTIVITIES (cont.)**

-Florida Afterschool Network  
-Board of Directors (2016-Present)  
-*Chair (2019-Present)*

-Capital Tiger Bay  
-Member (2013- Present)

-Leadership Lowndes  
-Youth Leadership League  
-*Retreat Chair (2011-2013)*  
-Economic Development Day  
-*Day Committee Member (2011)*  
-Legislative Day  
-*Day Committee Member (2011)*  
-Class of 2010

-Valdosta Lowndes Chamber of Commerce  
-Metro-One Young Professionals Network  
-*Co- Chairman (2010,2011)*  
-*Member (2008- Present)*  
-*Networking Task Force (2008-2010)*  
-Targeted Business Expansion Committee

-Tallahassee YMCA  
-Youth in Government  
-*Advisor (2004-Present)*  
-*College Staff (1993-1997)*  
-*Participant (1987-1991)*  
-Conference on National Affairs Delegate (1989-1991)  
-Most Outstanding Statesman 1991  
-Speaker of the House 1990

-Y-Corps  
-*Advisor (2015- Present)*

- Maclay School Alumni Association  
-*Golf Tournament Committee (2001-2003)*  
-Chair (2003)

**John Trombetta**  
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Tallahassee FL 32308  
(706) 308-9031

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#### **HONORS & ACTIVITIES (cont.)**

- Student Advisory Council to the Georgia Board of Regents (1996-1997)
  - Authored and Presented Technology Fee Proposal to the Georgia Board of Regents
  - Tom MacDonald Career Achievement Award
- Valdosta State University Student Government Association (1995-1997)
  - Comptroller (1995-1996)*
  - Senator (1995)*
    - *Chair, Rules Committee (1995)*
  - Campus Activities Board (1996-1997)*
    - Chair (1996-1997)*

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#### **Professional Clubs & Designations**

- Georgia Educational Advancement Council
  - Member (2008-2012)
    - Presenter (2011)*
- Council for the Advancement and Support of Education
  - Member (2008-2016)
- Walter Industries Six Sigma Continuous Process Improvement Program
  - Green Belt (2004)*
- Kiwanis Club
  - Springtime City- Clearwater, FL
  - Member (2006)*
- Azalea City- Valdosta, GA
  - Member (2011-2012)*

# Florida Health Insurance Advisory Board (FHIAB)

## Executive Director (ED) Interview Questions

**Candidate Name:** John Trombetta

1. Please tell me about your recent work experience(s). I currently serve as the Executive Director of Alzheimer's Project, Inc. We are a Tallahassee based non-profit that provides services to caregivers that are caring for someone living with Alzheimer's or Dementia. We have a budget of about \$700,000 that is made up of private grants, government grants and fundraising. We have 5 full-time staff and 6 part-time staff. We also have a number of volunteers.
2. If you were to get this position, would you have other employment as well? Yes
  - a. If yes, then: Do you currently work for another entity that would present a conflict with this position? No, it is my hope that it would compliment it.
3. What is your understanding of this position and what skills do you bring to the position? The primary responsibilities are to manage the day to day affairs of the organization including managing the budget and financials, coordinating Board meetings including agendas, financial reports and documentation for other agenda items. This position also sees to it that yearly audits are performed, which requires the engagement of an outside auditor, which is another responsibility of the Executive Director. These tasks are very similar to what I do in my current role with Alzheimer's Project. I am well versed in Board Governance and how to set up productive meetings that are respectful of everyone's time yet accomplish the necessary tasks. In addition to the managing of the day to day, this position also needs legislative acumen. This includes a knowledge of the policy making landscape, and being able to identify issues that would be of concern to the members of the organization. This is something I currently do. I have have been working in the legislative process most recently since 2016. This includes not only working with legislative staff on policy issues, but on appropriations issues too.

4. Please describe your computer skills and what type of software you are experienced with. I am familiar with Microsoft office suite including word, excel, access and PowerPoint. Additionally, I am familiar with Raiser's Edge and DonorPerfect which are fundraising and event databases.
5. This role requires some data analysis to be performed in Excel. Are you comfortable using Excel and performing basic data analysis? Yes
6. Please describe some data analysis you have performed in Excel. I use it to show where our money is spent, I also use it to show trends in our respite rooms including occupancy vs. capacity and occupancy pre-Covid vs post-Covid. While these are simple analysis, the graphics help illustrate the story very well.
7. What is your budgetary experience? I am responsible for building and managing the Budget for our organization. I have had some type of budgetary responsibility for 13 of the last 17 years. This includes departmental budgets, project budgets, and organizational budgets.
8. Are you aware of Florida's Sunshine laws and meeting notice requirements? Yes
9. Have you ever set-up a meeting from beginning to end? Please describe. Yes. When I was with the YMCA, I set up our legislative days meeting which was 2 ½ days of both internal meetings (Board meeting and committee meetings) and External meetings (setting up Y Executives to meet with key legislators). Alzheimer's Project hosts an Annual Education Day that requires setting the agenda, getting speakers, and making sure technical pieces are in place.

10. Are you familiar with Florida's laws regarding health insurance and HMOs?

While I am by no means an expert, I have some familiarity. During my time with the YMCA, we partnered with multiple Medicaid providers to offer swim lessons. In doing so I learned about the process they go through with AHCA to get approval to service certain regions and the requirements made of them to get that opportunity. The ACA Marketplace is a familiar concept to me though I have not personally used it.

Additionally, I am responsible for our organizations Health Insurance plan and have had to go through the process of reviewing and selecting the options for our employees. This includes knowing who is eligible for the benefits, and what benefits are offered by a PPO vs HMO.

11. In your opinion, what is the biggest issue with the health insurance industry? On the consumer side it is trust and understanding what they are buying. On the insurer side it is a complex regulatory system that can hamper their ability to do business and be profitable.

12. What do you see as pros and cons of health care reform? The pros are that it could increase access, provide overall better/more complete care, reduce chronic disease and reduce hospital and emergency room usage. The cons are that it is expensive and the cost burden is not evenly distributed.

13. Please describe what you know about the current Florida health insurance markets?

I believe there are a limited number of companies that choose to operate in Florida. They have to go through an approval process to be able to offer plans in certain areas. ACA has caused individual markets to grow, while group markets and small group markets are shrinking. This changes the way insurance companies do business. Instead of focusing on the large employer groups in an area, they are also having to market to individuals. It is more efficient and cheaper to send a sales person to market to a captive audience of 500 employees who have a pre selected menu, than it is to send someone to market to 500 individuals with an array of options

14. What experience do you have drafting letters/memos to executive leadership or legislative bodies? (*The ED will be preparing meeting agendas, Chair's remarks, and drafting legislative proposals.*) I have a lot of experience writing letters and memos for legislative purposes whether in my name or someone else's. I have written remarks for me and for others to speak to various legislative committees.

15. Please understand that the ED is not to push the committee beyond its current scope and operation or as a platform to try and generate more business for themselves. Are you comfortable with the current scope and the constraints? Yes and welcome them. My job as the ED is not to advance my or anyone else's personal agenda, it is to make sure the operation is run according to the will of the Board.

16. Describe a tough problem that you have dealt with. Tell how you approached it and the outcome. I had a program that was underperforming, but whose leadership was responsible for getting the program to the highest level it had ever known. Unfortunately, this person had gotten things to a point where they were focusing on things that did not add value or additional participation. This person was a long time friend and had been instrumental in my being put in the position of their supervisor. Unfortunately I ended up having to ask for their resignation. In the end it was much better for the program. Many volunteers came back and were energized, and the students had a much more positive experience.

17. Describe two improvements you have made in your job in the past six months. One was implementing a database to help reduce time filling out the various forms required by all of the agencies we work with. We have 73 different forms that ask for a lot of the same information. By building this database, we put the information in one time and it populates the appropriate form. The second improvement I made was implementing a remote work policy. This has increased employee morale.

18. Tell about a decision you made that your supervisor disagreed with. How did you handle it? When working at Walter Mortgage Company, I made the decision to stop pursuing legal action on an account. We had been in court for over 6 years and the

balance of the account was far less than we had spent in legal fees. I approached my supervisor, told him what I had done, offered to give the same explanation to our company President. It was uncomfortable, and I did not like having to do it, but was willing to defend the decision, which I did. In the end, everyone agreed it was the right call to end it, even though we were in the right in the lawsuit.

19. When you worked on multiple projects, how did you prioritize? I first look at what's due when. I then look at the value to the organization. For instance, if it's a grant application for \$10,000 that we have a really good chance of getting, I will work on it first versus a \$20,000 grant that is a moonshot. I will still get both done, but want to make sure we get the one we are "supposed" to get before going after the other. I also look at internal versus external. If it is a deadline that was set internally, and it's moveable, then I will do the external one first, because it is important for people to be able to trust that we know what we're doing and that we will get things done on time.
20. Give an example of a time when you've been given an assignment that you didn't know how to do. Can you please tell how you approached the problem – how did you handle it? While at Valdosta State I had to do an audit of departmental functions for our accreditation review. I had never been involved in something like that. It was not as easy as asking someone because my department had internal and external functions. I had made some contacts through our trade association. I was able to call a longtime member and seek his guidance. It worked out well and I was able to complete the report.
21. What do you feel would be the most common errors made in a position such as this? The most common errors I see are not paying attention to the finances. Even if the organization is financially comfortable, you still need to follow up on receivables, watch cash flow, and stick to budget.
22. Is there anything else in your experience that you would like us to consider? I think it have a good mix of Board Management, Organizational Management and Legislative Expertise to excel in this position. I have a level of comfort and maturity

that allows me to put the organization ahead of my ambitions. The importance of knowing your role seems to be critical for this job. I am familiar with that, and can adhere well to it.