



Department: Administration
Reporting Period: 2026
Prepared by: Ann Ames, CEO
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1. Executive Summary

I provide oversight and direction, working in partnership with the Board and staff to provide the services and products the association offers. Currently, my focus has been on working with our new accounting firm to get our books updated, fully integrated into QuickBooks and addressing issues as they arise. I have also taken a lead role in the sale of RLI Personal Umbrella Policies and created a system with Brooklyn, so a licensed agent is doing the binding. I was also active during the legislative session and testified on several bills on behalf of Big “I” Nebraska. Additionally, I have been able to travel to the IIABA Legislative Conference and meeting as well as traveling with Katie to Billings for a Montana Big “I” event. I also manage the staff and as a team we continue to work through the steps in our strategic plan for year one.

2. Goals & Objectives

Goal/Objective	Status	Notes/Progress
Ensuring a healthy work environment with good ROI for members.	Ongoing	
Ensuring that we provide top-notch services and products.	Ongoing	
Educating our members on how we can help them.	Ongoing	
Monitoring legislation and government regulation to maintain an industry positive environment.	Ongoing	Worked with Nebraska Strategies during session and testified when needed.

3. Key Activities & Updates

- **Worked with Bryan from Colorado as well as Mary to agree on a market access contract.**
 - **Traveled with Katie to Montana for their annual convention.**
 - **Worked with Nebraska Strategies and Director Dunning to assess legislation that affected the industry and testified when necessary.**
 - **Did all the meeting set-up and logistics for Nebraska delegation meetings in Washington D.C.**
 - **Attended the 2026 IIABA Legislative Conference and participated in delegation meetings and IIABA meetings.**
 - **Filed all pertinent accountability and disclosure/lobbying forms or worked with Mary to do so.**
 - **Worked directly with Kali (new accountant) and her team to transition our accounting to them.**
 - **Worked with banks and vendors to transition contacts from Cheryl to current staff, started creating long-term procedures for redundancy.**
 - **Worked with Brooklyn and Cheryl to transition the RLI program and began selling PUPs and working with sub-agents.**
 - **Continued work with Five Nines regarding the cloud-based server transition and tasks they need completed for the move to take place.**
 - **Completed 2026 Spring Conference with the team.**
 - **Continue to work with staff regarding their portions of the strategic plan and goal setting for 2026.**
 - **General oversight and administrative work to manage the association.**
 - **Discussed potential options for additional revenue streams with team.**
 - **Set NASC meeting for July 2026.**
 - **Continued to work with our team on upcoming events.**
 - **Currently completing 40 hours of association management continuing education for CAE certification.**
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5. Challenges & Risks

- **Cheryl retiring has created some institutional knowledge gaps that we are addressing and planning ahead for future changes.**
- **Working with Kali to understand current cash flow challenges as we get closer to dues renewal. Ensuring adequate cash flow is necessary.**
- **Mergers and acquisitions continue to be a challenge for us however we plan to focus on the agencies that need our support most to supply them with the best possible services.**
- **We will need to continue to work on soliciting new members.**
- **Finding additional revenue streams will be necessary to help the association sustain.**
- **Partnering with other states will bring new challenges as we adjust our services, and we may need to look at additional staffing at some point.**
- **Navigating the changes at IIABA.**
- **Collecting revenue data from members for the new IIABA dues formula.**
- **Mid-term election changes and potential legislation that could change the industry.**

6. Looking Ahead

- Continue to work with accountant to solidify cash flow.
- Create policies and procedures for financial redundancy.
- Get dues renewal out earlier if possible.
- Work with Brenda to get membership campaign going.
- Assess possible revenue streams through other insurance products like EPLI.
- Assist Jacilyn with the Foundation and golf tournament.
- Follow-up on outstanding partner renewals and begin crafting the partner renewal campaign for fall.
- Continue work with Advocacy committees on legislation and PAC with a focus on reinvesting in IIANPAC.
- Agency visits
- Creation of a Leadership Academy, for NExtgen members.
- Complete re-certification for CAE.
- Continued oversight of association and working to ensure a healthy work culture for our team.