



Annual Board Retreat and Planning Minutes

October 10th & 11th, 2025

Emily Bloedel		Neil Colclough	x
Peggi Miller	x	Tammy Widhalm	x
Matt Friend	x	Amy Jones	x
Patrice Kraly	x	Jessica Mechtly	
Renee Pettinato Mosley	x	Kevin Shane	x
Chris Stephens		Taneal Pickles	x
Aaron Zaske	x	Ezel Masih	x
Emily Buckley	x		

Friday October 10th, 2025

12:00pm – Welcome Lunch – Quandry Peak Room

1:29 pm - Call to Order

August 2025 Meeting Minutes - approved

Retreat Objectives - Peggi

- Maintain a safe space
- Reflect – Prioritize things we didn't accomplish in 2025
- Strategic Planning for 2026
 - President's objective for 2026



- Professional Development
- Mentor Match
- Continue maintaining student engagement - prioritize; reframe messaging to students about "insurance"
- Continue building and supporting RRP

Chapter Governance - Peggi

- Code of Ethics - forms will be emailed to board for signatures
- Review the Directors and Officers terms
- RIMS Website – photos/bios - send updates to Fran or Taneal
- SOPs – Emily Bloedel is working on them - pending final information from committee - Peggi will follow up
 - Checklist for programming
 - Thank sponsors, zoom link, etc
- Google Drive - utilize the shared drive to collaborate
- Board meetings – meet in person every other month (hybrid for anyone that can't attend in person)
- Aaron – Chapter store - board shirts ordered
- Increase the number of student and associate members on the board
- Student replacement next year
 - Possibly add a 2nd student from NM to the board - must have odd # of total directors

Western Regional Conference 2025

- 2025 Conference Recap and Feedback
 - Emily Buckley will join WRC planning committee

Society Updates – Neil

- Promote Student Membership
- Promote Mentor Match
- ERM Conference – November 17th & 18th - Seattle
- DEI Advisory Council - website to be updated
- From Ondrea:
 - A board has been created for The Foundation for Risk Management. They're working on communications and ongoing efforts
 - Nominating Committee – they're updating the nominating committee process with regard to board positions. They're striving for increased transparency and the ability to self-nominate for board positions
 - Awards committee – awards, structure, metrics under review
 - RIMS Website – redesign underway – survey sent out to some members relating to organization of the site and key components



- Membership – hiring an additional membership specialist to work on Eric and Leslie’s team to help further support chapters and members
- Finance – updated investment policy statement and officially moved all investments to Schwab

DEI Committee

- Chair: Renee Boss
- Staci Taylor, Renee Boss, Heather Strong-Guiterrez, Neil Colclough
- Objectives ~ Education, Networking, Social Cause
- Chapter support of local affinity partners – Neil
 - AAIN, LAAIA, and NAAIA Colorado Chapters

Programming Committee

- Chair: Emily Buckley (Peggi transitioning off)
- Committee: Neil Colclough, Amy Jones, Stephen Weingold, Peggi Miller
- Send Fran info for a blast to go out for committee volunteers
- Discuss how we can assist the programming committee
 - Create shared calendar for committees - include other industry events so everyone can schedule accordingly
 - Create shared speaker list, venues, catering, topics, etc
 - Create subgroups to take on planning a month
 - Ask Fran about her capacity to take on more event planning - review contracts, negotiate costs, find locations, etc. OR look into hiring 3rd party event planner
- October events
 - 10/16 - RIMS @ GIS Internship Fair
 - 10/23 - RRP Speed networking
 - 10/28 - Community service – Coloring for a Cause
- November
 - 11/14 - Community Service RRP – We Don’t Waste
- December
 - 12/9 - Associate appreciation party, Courtyard Cherry Creek - 80s/90s
 - Donate toys

2026

- January
 - Educational - joint ASSP meeting. Topic ideas welcome
- February
 - TBD
- March
 - TBD
- April
 - 4/16-4/17 – SERMANar New York

Community Service

- Chair: Ondrea Matthews



- Committee members: Chris Stephens, Alivia Fox, Liz Stryker, Stephen Weingold, Liz Pendleton, Brett Seibel, Lorie Libby
- Our goal was to host one opportunity per quarter – accomplished
 - April – Earth Day
 - Lessons learned – only have sign-up through the Chapter. We had interest from 30+ members; however, only 3 could participate due to registration challenges
 - Next year we will work to identify a stand-alone project
 - May – BRI Paint-a-thon (lesson learned – much nicer to hold in early summer vs. the heat of July) *thank Chris!
 - June – Juneteeth booth – spearheaded to NAAIA pulling in multiple groups to support (future consideration – request volunteers and swag earlier and have a volunteer orientation call)
 - July – IICF BRI Paint-a-thon
 - October 28 – Coloring for a Cause in partnership with IICF supporting Project Angel Heart
 - November 14 – RRP and Community Service - We Don't Waste – Lalo Delgado Market
 - December – sponsor appreciation event – please review for consideration to partner with IICF and Thriving Families and shift from a food drive to a toy drive.
- We were able to partner closer with IICF and RRP on joint opportunities (see above) and look to continue that into 2026.
- **Budget –**
 - **We'd like to continue sponsoring Brothers Redevelopment & IICF again this year – pending approval once budget is finalized**

Membership

- Chair: Gary Rimler
- Committee: Nick, Jessica Mechtly, Shadia Ahmad, Charles Perkins
- Update on Membership (from July)
 - 1,599 Chapter LinkedIn followers +34 since last meeting
 - [map of where members are located](#)
 - Membership
 - Professional - 169
 - Chapter Associate - 58
 - RIMS Associate - 9
 - RRP – 30
 - Student – 27
 - Total – 293
 - Neil will touch base with Gary for 2026 plan

Nominating

- Chair: Emily Buckley
- Committee: Ondrea, Tammy, Kevin, Matt Friend
 - Emily will chair committee
 - Committee will review bylaws
 - Extend presidents elected term to coincide with board term



4:33 pm Adjourn

7:00pm Dinner
Horseshoe Breckenridge
113 S Main St



Saturday October 11th, 2025

Emily Bloedel		Neil Colclough	x
Peggi Miller	x	Tammy Widhalm	x
Matt Friend	x	Amy Jones	x
Patrice Kraly	x	Jessica Mechtly	
Renee Pettinato Mosley	x	Kevin Shane	x
Chris Stephens		Taneal Pickles	x
Aaron Zaske	x	Ezel Masih	x
Emily Buckley	x		

8:00am – Breakfast – Quandry Peak Room

9:21 am Call to Order

Day One Reflection

Professional Development

- Chair: Chris Stephens & Peggi Miller
- Committee: Emily Bloedel, Emily Buckley, Stephen Weingold, Brett Seibel, Kevin Shane
 - Outreach for grant applications – add in newsletter
 - Society is working on promoting mentor match

Recognition

- Chair: Matt Friend
- Committee: Emily Buckley, Amy Jones, Renee Pettinato Mosley
 - Need committee members
 - Committee will create criteria for annual chapter awards
 - Hall of fame, volunteer of the year, partner of the year
 - Add hall of fame & past president section to website

Sponsorship

- Chair: Taneal
- Committee: Emily Buckley, Bri McGuire, John Westcot
 - Create post event recaps to review costs, profitability, good & bad, etc
 - Revamp sponsor checklist packet
 - Review sponsor lists – board connections for outreach



Golf

- Chair: Peter Hallez
- Golf Committee: Dan Burseth, Patrice Kraly, Kori, Bri Young, Aaron Zaske
 - Recap of the golf tournament – another successful year!
 - Added additional sponsor opportunities which sold out
 - Peter to arrange a 2025 event recap call with the committee

RRP Chapter Committee

- Chair: Amy Jones
- Committee: Fernanda, Austin Trimbur, Emily Bloedel, Alyssa M, Ezel Masih
 - Goal was 4 (2 social 2 educational) events in 2025 – 3 great events in '25 so far
 - Look for new committee chair
 - Partner with social committee
 - Work on reframing the message about what “risk management / insurance” industry is

Chapter Awards

- Chair: Peggi Miller
- Committee: Matt Friend, Emily Bloedel, Emily Buckley
 - Start the awards application December; Due in January 2026

Scholarship Committee

- Chair: Radu Demian
- Committee: Tammy
 - GIS Chapter Donation

Communication

- Chair – Taneal Pickels
- Committee: Renee, Kevin, Krupesh, Emily Bloedel, Emily Buckley, Ondrea Matthews
- Newsletter cycle twice a year
 - Ask committees to send ideas they'd like to include
 - End of year include farewell & intro for chapter President
- [Shared GoogleDrive](#)
- Post tax return and remove monthly financials – Tammy will ask Fran

12pm - Lunch – Quandry Peak Room

Legislative

- Chair: Jim Blair
- Committee: Renee, Tony Patterson
 - 529 passed – can be used for professional development
 - NFIP expanded – tentative
 - Renee to talk with someone that might want to join the committee

Finance and Budget

- Chair: Tammy



- Committee: Patrice Kraly, Robert Glasser, Aaron Zaske
 - Review chapter financials
 - Consider restructuring the P&L report;
 - Angelika is reviewing cost to upgrade Quickbooks
 - Tammy & Angelika (accountant) will talk with Fran on current invoicing process and integration with QB
 - Track costs /revenue
 - Categories - Golf / Forum / RRP / Top Golf / Social-Connections / Clay Shoot
 - Add Angelika to Google Doc w/sponsor event \$
 - 2026 Budget Requests pending from committees
 - Increase scholarships in 2026 to \$20k
 - Tammy to check with Fran if membership fees are prorated or should be 12 month rolling

Performance Evaluations

Chapter Administrator (Fran)

Chapter Bookkeeper (Angelika)

2:57 pm adjourned