

FLORIDA HEALTH INSURANCE ADVISORY BOARD  
Executive Director Selection Committee Meeting

Friday, February 11, 2022, 9:00 AM

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 9, 2022 – Attachment
- VI. Interviews - Attachments
- VII. Other Business
- VIII. Adjourn

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

**February 11, 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.

**Florida Health Insurance Advisory Board  
Executive Director Selection Committee Meeting Minutes  
Wednesday, February 9, 2022, 9:00 AM  
Via Teleconference  
Tallahassee, FL**

**Committee Members Present:**

Seth Phelps, Chair

Louisa McQueeney

Ken Stevenson

**Others Present:**

- Amy Hardee, Administrative Assistant II to the Deputy Commissioner – Life & Health, Office of Insurance Regulation (OIR)
- Monica Ross, Chief Legal Counsel, OIR

**I. Call to Order**

Chair Seth Phelps called the meeting to order at 9:00 AM.

**II. Roll Call**

Amy Hardee conducted a roll call, noting that all Committee members were present.

**III. Antitrust Statement**

Monica Ross was recognized and reviewed the antitrust statement.

**IV. Chair's Opening Remarks**

The Chair noted that the purpose of today's meeting is to begin the interview process with four of the candidates for the Florida Health Insurance Advisory Board (FHIAB) Executive Director position. He indicated that the Committee has reviewed each candidate's resume, written interview question responses, and any other information provided by the candidates and that today's interviews would be an opportunity for the committee members to ask any relevant questions of the candidates, for the candidates to ask any questions they have for the committee, and to give the candidates the opportunity to highlight relevant background they may have with respect to the Executive Director position. He reminded everyone that the Executive Director position is an independent contractor position and then thanked the candidates for taking the time to participate in today's interview process.

**V. Approval of Minutes, January 7, 2022**

The Chair presented the minutes from the January 7, 2022, meeting for adoption, noting that members had been provided with advance copies. Louisa McQueeney moved to adopt the minutes as written, with a second by Ken Stevenson, and the minutes were adopted without objection.

## **VI. Interviews**

The Chair then began the interviews, which were held in the following order:

1. John “Jack” McDermott
2. William (Bill) Eichhoefer
3. Christopher “Scott” Jenkins
4. Ashlee Tising

Each individual interview began with the Chair asking the following questions, which were responded to by the candidate:

1. Please elaborate on your experience regarding managing a budget for a Board or similar organization including the use of tools such as Excel or similar financial software, as well as collecting fees/dues and or assessments.
2. Describe your relevant experience with planning meetings for Boards or other organizations with an emphasis on any public organizations subject to the Sunshine Act here in Florida.
3. Given your understanding of the job duties of the position, what three key items from your background do you feel are most relevant for the Board to consider when evaluating you as a candidate for this position?

Following the candidates responses to the above questions, time was turned over to the other Committee members (Louisa McQueeney and Ken Stevenson) for any additional questions. Their questions tended to focus on conflicts of time with current employers, health insurance experience, and conflicts of interest with other clients. There was also a discussion regarding contracting with a candidate’s employer, which was tabled for a follow-up meeting.

Following the Committee’s questions, the candidates were given time to ask questions, which included the following:

- Is there anything coming up in the next couple of years that’s out of the ordinary?
- Do FHIAB expenses come out of the Executive Director’s \$5,000/month salary?
- Are meetings always held in Tallahassee or are they held statewide?
- Any movement to change the statute requiring at least one in-person meeting/year?

The candidates thanked the Committee for their time and the opportunity.

Following the conclusion of today’s interviews, the Chair noted that three additional candidates will be interviewed on Friday (February 11). Following that meeting, the Committee will re-convene on February 15 at 2:30 PM to review the candidates and select one to recommend to the full Board for appointment to the Executive Director position.

There being no further business, the Chair moved to the next agenda item.

**VII. Other Business**

The Chair asked if there was any other business to be brought before the Committee.

There being none, the Chair moved to the next agenda item.

**VIII. Adjourn**

Having no further business, the meeting was adjourned at 10:30 AM.

\_\_\_\_\_  
Seth Phelps, Chair

\_\_\_\_\_  
Date

DRAFT

# 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:** 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.

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**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



### 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.

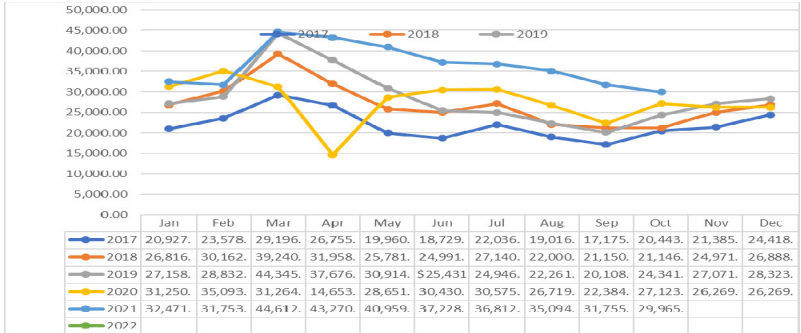
Finally, my greatest attribute is the ability to work independently without supervision to accomplish essential duties. My self-starter, industrious work ethic has served me well throughout my career and I excel when pushed by deadlines despite working autonomously.

**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.

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**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.

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**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



## 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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## 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 tradeshow across the state.
- Leveraged expertise to deliver 150+ “unqualified opinion” or “clean” annual, independent audits and program audits to OPAGGA, Department of Financials 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 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



LinkedIn JOBS

Your job, Executive Director, has a new applicant!



**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**  
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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.



**John Trombetta**  
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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
- 

**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 Develoment 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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**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.