

## 2026 LIC Human Resources Committee Virtual Meeting

Via Webex | Thursday, April 9, 2026 | 1:00 – 4:00 p.m. Eastern | Register at [www.loma.org/LICHR](http://www.loma.org/LICHR)

*This event provides an opportunity to discuss challenges and opportunities and share ideas with fellow HR executives from small-to-midsize life insurance companies and fraternal organizations. Find out what's going on at other companies, build your network, and hear from subject matter experts on timely HR topics.*

1:00 p.m. ET **Welcome & Introduction: Dean Lambert, Executive Director, LIC**

1:10 p.m. ET **Attendee Introductions and Activity Reports**

2:00 pm ET **Industry Insights for 2026**

*Jack Walsh, Managing Director, Jacobson*

Labor market overview, best practices, and recruiting/retention update, and how AI is shaping the roles of the future at insurance companies.

2:30 p.m. ET **Case Study: Succession Planning at Baltimore Life**

*Robin Dahlka, SPHR, AVP, Human Resources at Baltimore Life*

Robin will present the succession planning process that Baltimore Life began a few years ago, including what inspired it, their approach, current state and follow-up activities, as well as lessons learned along the way. We'll discuss evaluating and developing high-potential employees, and ensuring readiness in the context of the company's strategic plan and vision.

3:20 pm ET **Break**

3:30 pm ET **HR Hot Topics Discussion**

*Facilitator: Jack Walsh, Managing Director, Jacobson*

We'll cover these and other Q&A topics requested by attendees. Share what's going on at your company and learn what the others in the group are doing:

- **How do companies handle professional development?** Do they pay for the courses and then expect them to be completed on personal time? Do they pay for courses and allocate time during the workday for employees to complete their course work? Is it different for hourly vs. salaried employees?
- **Employees Using AI:** Do other companies allow this? What kinds of policies are in place to govern the use of AI? Baltimore Life's new AI-powered knowledge base (Whale platform)
- **Recognition programs** for small organizations
- **Bonus allocation methods.** Percentage of salary - fixed or range? Split on performance and goals? Weighting of goals? How to make this simple to communicate and apply.

4:00 p.m. ET **Adjourn**

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