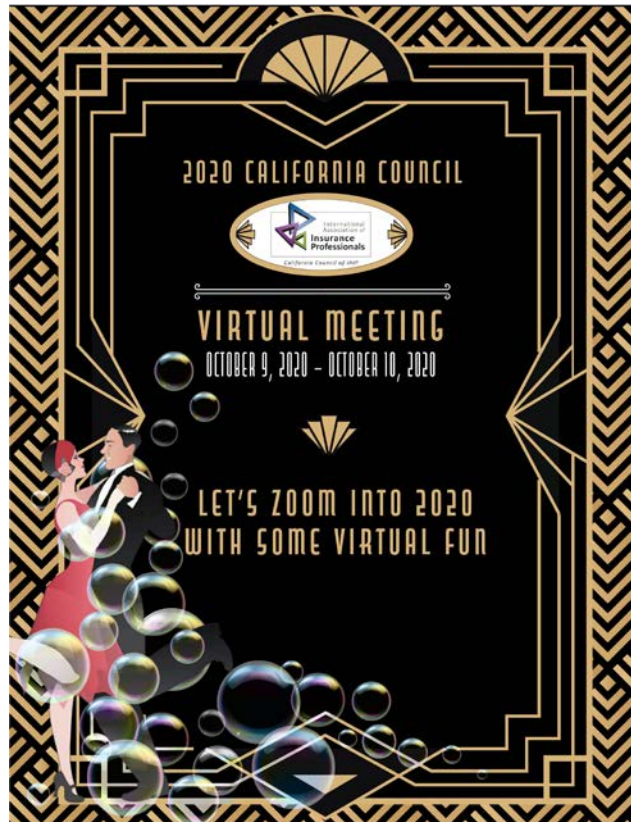


## California Council of IAIP (International)

October 9<sup>th</sup> & 10<sup>th</sup>, 2020

Virtual Meeting

*Roaring Into the 20's*



**This Program Belongs To:**

---

**Name**

*Roaring Into the 20's*

**California Council of IAIP (International)**

**33<sup>rd</sup> Annual State Meeting**

# **The International Association of Insurance Professionals**



**C**ommunity

**O**utreach

**U**sing

**R**esources

**S**kills

**E**ducation

*Roaring Into the 20's*

**California Council of IAIP (International)  
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## **Welcome from the California Council Director**



On behalf of your entire California Council Cabinet welcome, welcome, welcome to our 33<sup>rd</sup> Annual California Council meeting but our very first virtual Council meeting. We thank you for your attendance, encouragement, and support in this virtual environment.

South Bay Association of Insurance Professionals (SBAIP) is our host association and they have gone above and beyond to make to this event as memorable and valuable to us as it would be if we were meeting in person. Our hat is off to you SBAIP for your tireless efforts in bringing this meeting to fruition during some very unique times.

As Council Director I would like to thank everyone one who has come along side us and volunteered (or were voluntold) to Chair a committee, serve on a committee, provide instruction in our Educational courses or offered guidance and support.

### ***Calling all First Timers*** 📣!!!

This would be everyone!! First Timers rights are still bestowed upon our Council Meeting First Timer attendees but the rest of us are First Time “Zoomers” and we can relive those first-time privileges right in our own homes. So, post your Bill of Rights where they can be seen by all.

Please join us as we Roar into the 20's at the Welcome Party, please take part in the Education classes that have been prepared for you and our Business session to be held on Saturday October 10<sup>th</sup>.

If you have any questions, please feel free to reach out to any member of the California Council Cabinet again, we welcome you and hope you have a memorable time at this Council meeting.

In Fellowship

Kari Woods, CLP  
California Council Director

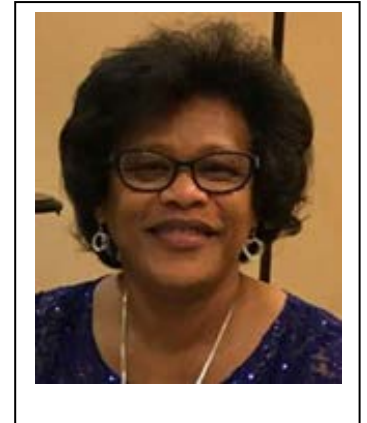
*Roaring Into the 20's*

## **Welcome**

### **From the Assistants to CA Council Director**

Hello and Welcome!

Welcome to the 2020 CA Council Virtual Meeting, being hosted by the South Bay Association of Insurance Professionals. I am sure we are all excited about this year's first ever Virtual Meeting, being held via ZOOM on October 9<sup>th</sup> & 10<sup>th</sup>. The South Bay Association of Insurance Professionals have been working very hard planning this meeting and providing educational opportunities. They have devoted many hours of their personal time and life, to provide the rest of us with a wonderful experience, so please do not forget to thank them. Thanks also to all the other members who volunteered their time to work on the various committees.



I look forward to seeing old friends and meeting new ones, and I want to especially welcome all the First Timers. I am sure you will have a truly wonderful experience networking and meeting many new people and perhaps friends for life.

Please enjoy your weekend and take advantage of the many educational and social activities the South Bay Association of Insurance Professionals have planned.

Thanks for joining us, again for the first ever Virtual California Council meeting via ZOOM.

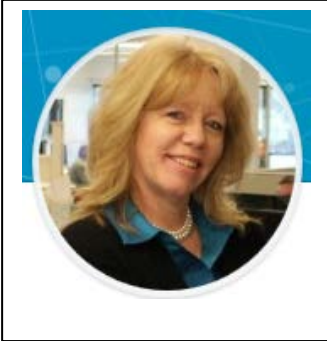
In Fellowship,  
Julia Alexander, CPIW, CISR  
Northern California Council Director's Assistant



Welcome Everyone to our first ever virtual CA Council, you are being part of history. SBAIP and the Council Board has worked so hard from converting the conference from in person to virtual, I tip my hat off to them. I am so excited for the CLP education class, fun games and of course CWC! No matter if we are in person or in a virtual meeting, we know how to have a great time together.

In Fellowship,  
Brooke Lesniak  
Southern California Assistant to the California Council Director

## **Welcome** **From the RVP**



*Welcome to the 2020 California Council Meeting! I'm excited to continue our adventures into the virtual world of conferences. We are resilient and adaptable, which is why I'm so proud to be a part of this great organization, from our local chapters to National. I hope everyone takes advantage of the great educational opportunities and I look forward to seeing more CLP designation announcements in the near future. For some, education is what will help us thru this time in our lives. Not only for occupation opportunities, but also just to keep us engaged while being isolated in our homes. "Education is the passport to the future, for tomorrow belongs to those who prepare for it today." – Malcolm X*

*I will also miss seeing everyone in person, but I know this will be a great conference and I look forward to "virtually" seeing/talking with everyone. I will continue to ask for our members to support each other in this environment and to share any experiences that may help others. Please feel free to contact me and discuss any concerns, requests or just to say hi!*

*Best,*  
*Robin Souza, CPCU, CIC, CRM, AFIS, AIS, AIC, AINS, CIIP*  
*Region VII RVP*  
*Insurance Associates of Fresno*

## Welcome From the Host Association

The South Bay Association of Insurance Professionals would like to give a sincere welcome to everyone attending the 2020 California Council virtual meeting via Zoom, especially during these very unprecedented times!

We hope that you can attend the offered educational opportunities, especially if you are working towards your CLP designation. Also, we hope that you have received your swag bag and can rock a Roaring 20's look for the Welcome Party, which is sure to be a nice time to see everyone's faces! As always, I'm especially excited for the CWC competition and the Keynote Speaker.

SBAIP has learned a great deal in this experience to be able to bring this event to you virtually and we hope that we can pull it off with minimal hiccups. Starting with the weekly board meetings to prepare to prerecord the

CWC Speak-Off, learning to navigate and customize the waiting room, presentation timing, editing a recording (special thanks to Fredy Rodriguez), etc. The virtual Zoom learning curve has been challenging and at the same time an amazing undertaking to be learning something new around every corner.

A special thanks to Kari Woods, CLP (Council Director), Regina Lemanowicz, CLP (Public Relations Chair) and Christine Chandler Tillett, PHR, CLP, CRIS, CIIP (Council Consultant) who assisted SBAIP all along the way!

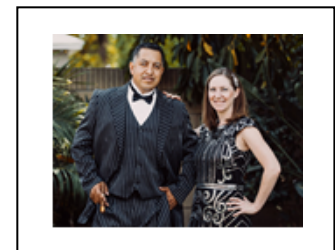
Sarah Jane Jara, CLP  
President of SBAIP & Co-Chair



I want to welcome everyone on behalf of South Bay Association of Insurance Professionals to the 2020 California Council Virtual Meeting. The Goal of our association its always to continue SBAIP's mission in developing leaders, influencing careers, and connecting members through providing enhanced education, and delivering exceptional resources for members. In this unprecedented day, we hope to continue to bring those values to you virtually.

I would like to give Special Thanks to our President Sarah Jane Jara and everyone involved in making this possible as well as to our attendees and sponsors. Without you this would have not been possible.

Kind Regards,  
Fredy Rodriguez  
SBAIP CA Council Host Co-Chair



**2020 CALIFORNIA COUNCIL OF IAIP COMMUNITY ACTION PROJECT**



<https://www.longbeachbasketbrigade.org/donate>

501 (c)(3) non-profit (Tax ID#26-4774432)  
6444 E. Spring Street #249 Long Beach, CA 90815

Family Sponsor	\$ 25.00	Bronze Sponsor	\$ 250.00
Silver Sponsor	\$ 500.00	Gold Sponsor	\$1,000.00
Premier Sponsor	\$2,000.00	Other Amount	any amount

Each year, over 300 local residents and many businesses, church and community groups and local Long Beach schools unite to create baskets of Thanksgiving meals specifically designated for local area families in need. Our participants reflect the vast diversity of the city of Long Beach. In the months prior to Thanksgiving, our volunteers spend countless hours raising funds, purchasing food and supplies and assembling and delivering the baskets.

Visit our website to see pictures of our 2019 build event and distribution.

<https://www.longbeachbasketbrigade.org/event> over 20 schools and small groups collected 1500 (and more) of each of the non-perishable items for the baskets:

The LBBB is a 100% volunteer organization that delivers Thanksgiving 1,500-2,000 baskets for families in need with the Long Beach Community. By spreading the word about the mission of the Long Beach Basket Brigade, you directly impact the number of lives that are touched.

Thank you.





## Schedule of Events

**Friday, October 9<sup>th</sup>, 2020**

EVENT		TIME
Registration & Credentials		
Education		01:00 – 05:00 pm
Welcome Party – Great Gatsby Exhibitors & Fundraising Tables		06:00 pm – 09:00 pm

### **Agenda, Saturday, October 10<sup>th</sup>**

#### **First Business Session**

**Time: 9:00 am – 12:00pm**

*Times / Schedules Subject to Change*

9:00 AM	<b><u>OPENING CEREMONY</u></b>	
	Call to Order	Kari Woods, CLP
	Collect	Raymond Huff
	<b><u>WELCOMES &amp; RECOGNITION</u></b>	
	Host Association President & Council Co-Chair	Sarah Jane Jara, CLP
	Host Association Council Co-Chair	Fredy Rodriguez
	International President – Welcome Remarks	Lauri Oakden-Binder, RWCS, CIIP, CLP
	Region VII Vice-President- Welcome Remarks	Robin Souza, CPCU, CIC, CRM, AFIS, AIS, AIC, AINS, CIIP
	California Council Director – Welcome Remarks	Kari Woods, CLP
	Acknowledgement of VIPs, Committees & Seminar Leaders	Kari Woods, CLP
	<b><u>CWC SPEAK-OFF</u></b>	Regina Lemanowicz, CLP
	----- <b>BREAK</b> -----	

*Roaring Into the 20's*

	<b>RECONVENE THE MEETING</b>	Kari Woods, CLP
	Report of the Credentials Committee Report	Mitula Patel, CLP
	Adoption of the Annual Meeting Rules	Andrea Gable Setterstrom
	Adoption of the Meeting Program	Betsy Johnson, CISR, CIC
	Recognition of Committee Appointments	Kari Woods, CLP
	State of the Association Report	Robin Souza, CPCU, CIC, CRM, AFIS, AIS, AIC, AINS, CIIP
	California Council Report	Kari Woods, CLP
	Membership Development Report	Marcella Beasley, MA, CIC, CISR, CRIS, CCIP, MLIS, CLP, CIIP, TRIP
	Public Relations Report	Regina Lemanowicz, CLP
	California Trust Fund Report	Robin Fawkes, CIIP, CCLA, DAE
	California Trust Fund Audit Committee	Kim Green, AIC, AIS, CPIW
	Legacy Foundation	roz horton, CIIP, PIAM

**LUNCH: 12:00 PM TO 1:00 PM Lunch on your own (Silent Auction)**

**Second Business Session**

**Time: 1:00 pm – 3:00 pm**

1:00 PM	<b>RECONVENE THE MEETING</b>	Kari Woods, CLP
	<b>KEYNOTE SPEAKER</b>	Jamil Frazier
----- <b>FIT BREAK</b> -----		
	<b>REPORTS</b>	
	Credentials Committee Report	Mitula Patel, CLP
	Roll Call of Delegates	Jolene Galvan, ACSR, CPIW, CISR-Elite, AIS, CPSR, AINS, DAE, CLP, MLIS
	Bylaws & Standing Rules Report	Andrea Gable-Setterstrom
	Recommendations	Lucille Shalometh, CPIW
	Voting if needed	
	<b>CONFIRMATION &amp; CALL FOR BIDS</b>	
	2021	San Diego Association of Insurance Professionals

	2022	San Francisco Insurance Professionals
	2023	Bids Open
	<b>CLOSING</b>	
	Unfinished Business	Kari Woods, CLP
	New Business	Kari Woods, CLP
	Opportunity Drawing	Applicable Association Reps
	Host Association President & Co-Chair - Closing Remarks	Sarah Jane Jara, CLP
	Host Association Co-Chair – Closing Remarks	Fredy Rodriguez
	CA Council Director – Closing Remarks	Kari Woods, CLP
	<b>ANNOUNCEMENTS</b>	
	<b>ADJOURNMENT</b>	Kari Woods, CLP

### **AWARDS**



# International Association of Insurance Professionals



## 2020 Awards

**Member of the Year** - Recognizes an individual who has shown outstanding personal achievement, leadership abilities, and dedication to their local association, their state council, Region VII and IAIP, which surpasses the accomplishments of other members of the state.

Winner: \_\_\_\_\_ Association: \_\_\_\_\_

**Mentor of the Year** - Recognizes an individual who has who has been inspirational as a mentor, dedicated to the core values and mission of IAIP, and who has demonstrated a willingness to coach, teach, and help others. An effective mentor possesses characteristics such as patience, understanding, and expertise within the industry and the organization.

Winner: \_\_\_\_\_ Association: \_\_\_\_\_

**Young New Professional of the Year** - Recognizes an individual, under 40, who has been a member for at least 36 months and who has shown outstanding personal achievement, leadership skills, and is actively involved in their local association, and a willingness to get involved at the state council, Regional and National levels.

Winner: \_\_\_\_\_ Association: \_\_\_\_\_

**Gayle Reskin Angel Award** - Recognizes a member who has been inspirational and who embodies the spirit of IAIP. This award is designed to honor those who may not choose to be in the forefront, but who support the organization not only through their actions, but through their attitude, dedication and support of IAIP and CA Council members.

Winner: \_\_\_\_\_ Association: \_\_\_\_\_

### **CWC Speak-off**

Winner: \_\_\_\_\_ Association: \_\_\_\_\_

### **Membership Retentions Awards**

Northern California: \_\_\_\_\_

Southern California: \_\_\_\_\_

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## Keynote Speaker: Jamil Frazier

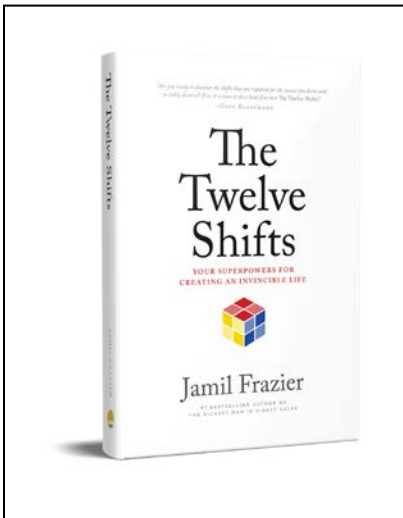


*Jamil Frazier is a motivational speaker, author, certified health coach, personal development coach, and the founder and CEO of Think Life Is Different, Inc. Today, his coaching network has served over 50,000 clients and is growing — but his impact didn't always look this way.*

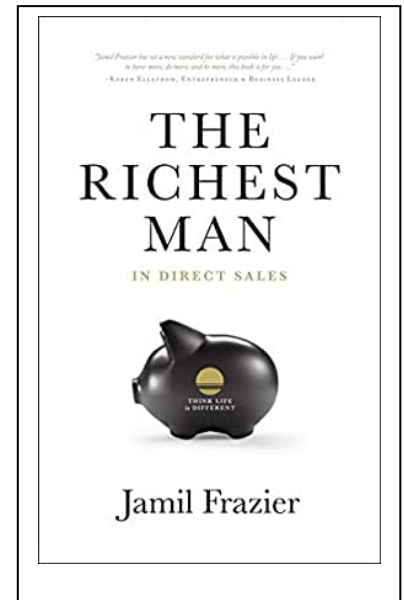
*In April 2012, he hit a pivotal moment where everything was out of balance. He was physically unhealthy, financially broken, relationally poor, and mentally frayed. Simply put, he was a mess. However, after deciding to build holistic health, he found traction on the path to true wealth.*

*Now he dedicates his life to guide individuals and organizations to achieve financial independence, healthy minds and bodies, and thriving relationships.*

*If there was only one thing he could do before leaving this earth, it would be to help people everywhere learn to think well. And he's just getting started.*



Learn more about Jamil at [www.thinklifeisdifferent.com](http://www.thinklifeisdifferent.com).  
Also look for Jamil's books on Amazon



## **Instructor Biographies**

### **Christine Chandler Tillett, PHR, CLP, CRIS, CIIP**

Christine is currently a Human Resources Director and Risk Manager, for Charles Dunn Company, Inc. She is responsible for employee relations, recruitment, training and development, payroll, compensation administration, benefits, workers' compensation, vendor and corporate insurance.

Christine has over 18 years of Human Resources experience and a combined management experience of 25 years. Christine's concentration in the workplace is in Conflict Resolution, Leadership Development, Generation Gaps and Employee Relations. She is a recognized trainer by the California Department of Insurance and International Association of Insurance Professionals. She holds Professional in Human Resources (PHR), Certified Leadership Professional (CLP), Construction Risk Insurance Specialist (CRIS), Certified Insurance Industry Professional (CIIP) designations and currently pursuing her Certified Risk Manager and Certified Diversity Professional (CPD) designations.

She loves Country and Western music, the Broncos NFL team and has lived in Long Beach for over 20 years but doesn't like the beach. Go figure!

### **Gina Thomas Patterson, CISR Elite, CPIW, DAE, CLP**

Gina Thomas Patterson, CISR Elite, CPIW, DAE, CLP Gina is the Assistant manager, Special Underwriting & Sales with Roanoke Trade in their Long Beach, CA office. She is an approved Lloyd's Coverholder and presently holds underwriting authority for the Munich Re Syndicate at Lloyd's of London. Roanoke Trade is a subsidiary of Munich Re and an affiliate of the Munich Re Syndicate at Lloyd's of London. She oversees the day to day operations in Roanoke's specialty Transportation Advantage Program division for domestic freight forwarders and property brokers. Gina is Past President of the South Bay Association of Insurance Professionals (a DBA of the South Bay Chapter of NAIW), a local affiliate of the International Association of Insurance Professionals. She is also South Bay's Education Director with the State of California Department of Insurance, and has served in various capacities including president-elect, vice president, webmistress, education, communications, and awards chair for the association. In 2009, she was instrumental in developing SBAIP's Mentors & Protégés program which was adapted for use for the CA Council of IAIP, Region VIII of IAIP as well as at the international level. Gina is the president of Insurance Professionals of Orange County and is a dual member of South Bay Association of Insurance Professionals.

## COURSE DESCRIPTIONS

### **CERTIFIED LEADERSHIP PROGRAM (CLP) – Leadership through Strategic Management – Succession Planning**

**Friday 10/09/2020 1:00 – 5:00**

A lack of succession planning is like driving your car in the dark without headlights. This course will show you how to create a pipeline of potential top leadership and bring selection systems and reward systems and management development into alignment with the process of leadership renewal and development. (4 hours)

This course qualifies for IAIP Education credits for DAE and CIIP designations/renewals.

Course Material and Online post-exam included in registration fee.



### **I CAN! A STEP ABOVE: INLAND MARINE – BUILDER’S RISK FROM THE GROUND UP**

**Friday 10/09/2020 1:00 – 2:00**

#### **Course Purpose and Objective:**

This is a one-hour course to help the student gain a basic understanding of builder’s risk coverage. Builder’s risk coverage is not just purchased by contractors. The policy/coverage may be purchased by the building owner. Regardless of which party is purchasing the builder’s risk, your client should understand the importance of a correctly structured builder’s risk program to protect their investment during construction.

By participating in this program attendees will be able to

- Identify needs for Builder’s Risk Coverage
- Evaluate coverages afforded by the policy
- Analyze valuation methods
- Recognize coverage expiration triggers

Course material included in registration fee – please contact instructor prior to submitting for Online Exam.

This course qualifies for IAIP Education credits for CIIP and DAE designations/renewals.





Chart your **C.O.U.R.S.E.**  
at the 2020 CA Council Meeting

All drawings will be held throughout the meeting

## Community Outreach Using Resources Skills and Education

- C.** Community Outreach-Long Beach Basket Brigade
- O.** Opportunity Drawings
- U.** Update your IAIP Profile - Contest
- R.** Registration - Will your registration be the lucky one?
- S.** Silent Auction - All That Jazz
- E.** Education-CLP Class

**Must be present to win!**  
**Roaring 20's Welcome Party with games and prizes!**  
**Make sure to have your Compass you received at Leadership nearby!**



Join us for the Welcome Party with a special cocktail: Miss Parker:

**Cocktail:**  
Tools:  
Jigger  
Champagne Flute  
Ingredients:  
Moet (champagne of your choice)  
Angostura Bitters  
Cognac (Hennessy, Ciroc Brandy, etc)  
Granulated Sugar cube  
Luxardo Cherry

**Mocktail\***  
Tools:  
Jigger  
Champagne Flute  
Ingredients:  
Club Soda  
Ginger Beer  
Granulated Sugar cube  
Luxardo Cherry

\*Another mocktail option would be Martinelli's Apple Cider. Simply refrigerate and you are ready to toast!

## **General Information**

### **Credentials**

Delegates & Alternates are required to provide their Credentials prior to the start of Saturday morning's business session. To the Credentials Chair, Mitula Patel, via email.

### **Registration**

Contained in your registration packet are your name badge, ribbons, guest badges if applicable. Badges will be required to participate in all events.

### **Name Badges**

Name badges are required to be worn at all business sessions and meal functions except at the Saturday Night Awards Banquet.

### **Electronic Devices**

Electronic devices must be turned off or in silent mode during all business sessions, workshops and other scheduled events.

### **IAIP Fundraising / Vendor tables**

The Fundraising tables for future IAIP Conferences will be set up virtually during the Welcome Party.

### **Continuing Education**

For classes providing continuing education credits please sign in and out to and have your insurance license available if required.

### **Conference Dress/Weather**

Dress for all seminars, business meetings and events are business casual.

Friday Night Welcome Party – **GREAT GATSBY PARTY** – wear your beads and headbands (provided in the swag bag)

Saturday Awards – Business Casual

### **Leisure/Meals**

Thank you to our Food & Beverage Sponsors, Soriano Law Group & AmWINS. Grub Hub and Starbucks gift cards are located in your swag bags.

## **CODE OF ETHICS**

### **Introduction**

Membership in the National Association of Insurance Women (International) dba International Association of Insurance Professionals ("IAIP") is a privilege. IAIP membership is open to all in the insurance and risk management industries who strive for and practice professionalism, regardless of their career level.

In order to maintain the privilege of IAIP membership, it is important that IAIP members act with integrity and avoid any action that will compromise the member, IAIP itself and the member's relationship with IAIP. The principles in this Code of Ethics (the "Code") provide guidelines that are intended to enable IAIP members to conduct their membership activities in a professional manner. However, these guidelines do not supersede any fiduciary duty owed by members, officers, Directors, employees, agents or volunteers of IAIP under applicable law.

IAIP members are expected to understand and comply with the policies set forth in this Code. Accordingly, all IAIP members should read the Code carefully to make sure they understand all the provisions of the Code, the consequences of not complying with the Code, and the importance of the Code to IAIP's continued success in all insurance and risk management industries.

While this Code cannot anticipate every possible situation or cover every topic in detail, the central concept of the Code is to confirm IAIP's commitment to the principles of ethical and lawful conduct, and all decisions should be evaluated in this light.

### **Conflict of Interest**

A conflict of interest may arise when a member takes action or has personal interests that are incompatible with the interests of IAIP. IAIP members should never abuse their relationship with IAIP by competing with IAIP or bringing discredit or disrepute to IAIP. In any situation where it may reasonably be perceived that there is a conflict of interest, members shall disclose any personal, business or organizational interests, affiliations or activities that could be construed as a conflict with the activities of IAIP.

### **Use of IAIP's Intellectual Property**

IAIP is the sole and exclusive owner of all its intellectual property, including but not limited to the name, trade name and trademarks of IAIP. Any use by a member of the intellectual property of IAIP must be authorized in advance in writing by an authorized representative of IAIP.

### **Confidentiality**

The reputation of IAIP is a valuable asset and should not be exploited by a member for personal advantage or for the advantage of any other person or entity. Information about the activities of IAIP that a member acquires and that is not generally known or available to the general public, including but not limited to procedures, methods, programs, systems, strategies, improvements, customer lists, and technical data, shall be treated as proprietary and confidential information of IAIP. Furthermore, all confidential information is property of IAIP.

### **Acceptance of Gifts**

Members shall not accept gifts, favors, loans, discounts, or other consideration (other than items of nominal value, i.e., less than \$25.00 in the aggregate) from non-members in connection with their membership or service to IAIP, without advance disclosure and approval of the offer of such gift to an authorized representative of IAIP.

### **Personal Conduct**

In order to protect the reputation of IAIP, no member of IAIP shall have (i) been convicted of a felony, (ii) engaged in intentional, bad faith misconduct which is detrimental to IAIP at IAIP's sole determination, (iii) suffered the loss of any insurance license issued by any governmental authority, or (iv) engaged in business practices that do not conform to generally accepted practices of the insurance industry (collectively a "Disqualification" and sometimes referred to as "Disqualified"). In the event a member of IAIP is determined to be disqualified, the member shall immediately notify IAIP in writing of the Disqualification. If a member of IAIP is Disqualified, all membership rights and privileges of such person shall immediately cease, whether or not the member has officially resigned his or her membership in IAIP. Members agree to cooperate with IAIP with respect to any inquiry involving a Disqualification.

### **Violation**

Any violation of this Code of Ethics may be grounds for immediate revocation of membership and membership privileges. The Board of Directors of IAIP has the authority to consider issues involving membership violations and may determine to revoke the membership of any person that it determines has, more likely than not, violated this Code of Ethics. Before membership may be revoked, a member will have the right to respond. For more information, see the [Ethics Violation Appeals Process](#).

IAIP agrees to maintain, as confidential, any determination resulting in the revocation of the membership rights of a former IAIP member.

**Collect**

**Written By: Marie K. Franzen**

**Take us, O God, under Thy Divine protection.**

**Make us to act as Thy messengers for peace and contentment, for harmony and understanding.**

**Grant that we may see more clearly the point of view of other men and women in all lines of insurance.**

**Realizing the highly competitive nature of our business, teach us to respect competition at all times.**

**Keep us free from pettiness and unwise discrimination.**

**Let us work willingly, honestly, and thoroughly, giving service graciously at all times.**

**Teach us, O Lord, to know and to realize that by Thy grace we can live in perfect peace with one another.**

**And grant that through this organization, we may become closer in friendship and understanding.**

**AMEN**

**RIBBON IDENTIFICATION**

<b>Alternate Delegate</b>	<b>Jewel</b>
<b>Assistant</b>	<b>Yellow</b>
<b>CIIP/CPIW/CPIM</b>	<b>Violet</b>
<b>CLP</b>	<b>Navy</b>
<b>Council Director</b>	<b>Green</b>
<b>CWC</b>	<b>Cornflower Blue</b>
<b>DAE</b>	<b>Jade</b>
<b>Delegate</b>	<b>Maroon</b>
<b>Exhibitor</b>	<b>White</b>
<b>First Timer</b>	<b>Green</b>
<b>Gold Timer</b>	<b>Maroon</b>
<b>Host</b>	<b>Cream</b>
<b>Local President</b>	<b>White</b>
<b>Member At Large</b>	<b>Cream</b>
<b>International Officer</b>	<b>Rose</b>
<b>Past Council Director</b>	<b>Gray</b>
<b>Past International Officer</b>	<b>Maroon</b>
<b>Past Regional Vice President</b>	<b>Blue</b>
<b>Speaker</b>	<b>Blue</b>
<b>Young New Professional</b>	<b>Light Blue</b>

## **CALIFORNIA COUNCIL MEETING STANDING RULES**

- Rule 1:** All members attending the council meeting must register and pay fees. Admission to all sessions shall be by badge only.
- Rule 2a:** The credentials committee, directly after the opening ceremonies of the business meetings, shall report the number of delegates registered as present, with proper credentials.
- Rule 2b:** A member registered as an alternate can, upon proper clearance by the credentials committee, be transferred from alternate to delegate at any time during the continuance of the business meeting. A delegate may resume delegate status upon clearance by the credentials committee.
- Rule 3:** The Council Director shall appoint a committee of three to approve the minutes of the meeting.
- Rule 4:** All report and other materials for inclusion in the minutes shall be typewritten and presented to the meeting secretary.
- Rule 5:** Members shall be in their seats at least five (5) minutes before the scheduled meeting time. Delegates shall sit in the section reserved for them.
- Rule 6:** Members wishing to speak, after going to the microphone and being recognized by the chair, must give their name and association affiliation before proceeding to speak.
- Rule 7:** No member shall speak in debate more than twice on the same day, or longer than three (3) minutes per speech, without permission of the assembly granted by a two-thirds (2/3) vote without debate.
- Rule 8:** Any member in good standing may present motions or participate in discussion. Main motions and amendments shall be in writing, submitted in triplicate, signed by the maker and a seconded and shall be delivered to the meeting secretary immediately after being proposed. Only certified delegates or the alternates may vote.
- Rule 9:** Any member in good standing may make nominations from the floor for any of the offices, provided that the nominee's willingness to serve has been obtained. **Rule 10:** The quorum shall be a majority of the voting delegates.
- Rule 11:** The rules contained in the current edition of Roberts Rules of Order Newly Revised shall govern the meeting in all cases to which they are applicable and in which they are not inconsistent with the IAIP bylaws, standing rules, regional bylaws, council bylaws and standing rules, or these council meeting standing rules.
- Rule 12:** These rules shall be adopted by two-thirds (2/3) vote, amended or suspended by a majority of the voting delegates.

## **First Timers' Bill of Rights**

As a First Timer, this Bill of Rights is yours to help you become an integral part of the meeting and NAIW (International). We sincerely want you to feel comfortable getting involved in the meeting activities and meeting other members. As of First Timer, you are hereby given the following rights:

**First Timers shall** be given special identification, which should be worn at all meetings and functions.

**First Timers shall** be recognized by other members as having privileges and shall be treated accordingly.

**First Timers shall** have the right to first place in line:

- At all elevators
- At restrooms during the meeting recess
- At social functions

**First Timers shall** have the right to introduce themselves and ask members questions about the meeting and IAIP.

## **First Timers' Responsibilities**

Privileges come with obligations. With the First Timers Bill of Rights, come these responsibilities:

- Wear your First Timers' identification ribbon at all times or forfeit your Bill of Rights.
- Be on time for all meetings.
- Observe meeting rules and parliamentary process.
- Attend First Timers' Orientation and Delegates' Briefing.
- Sit with different people at each meeting and meal function.
- Get involved, ask questions, and participate in workshops.
- Report back to your local association on meeting activities.
- Return to next year's meeting with a First Timer.

## **Gold Timers Rights and Responsibilities**

The purpose of the Gold Timer's Bill of Rights is to make those who have attended at least 20 (twenty) Council Meetings be aware that they are important and are an integral part of IAIP. We sincerely want to honor Gold Timers who have been involved in meeting activities over the years and they have become part of Region VIII history. As a Gold Timer you are hereby given the following rights:

Gold Timers shall be given special identification which should be worn at all meetings and social functions.

Gold Timers shall be recognized by other members as having privileges and shall be treated accordingly.

Gold Timers shall have the right to be first in line at:

- All elevators
- At restrooms during meeting recess
- At social functions

Gold Timers shall have the opportunity to introduce themselves to Officers, Chairmen and other members asking meeting an IAIP questions.

Gold Timers' Responsibilities

Privileges come with obligations. With the Gold Timer's Bill of Rights come these responsibilities:

- Must be at least 60 years old
- Must have attended 20 conferences
- Must wear their special Gold Timer identification at all times
- Must be on time for all meetings
- Must observe meeting rules and parliamentary procedures
- Must sit with different people at each meeting & meal function
- Must get involved, ask questions, and participate in meetings
- Must remember First Timers also Get first place in line
- Must report back to their local association
- Must return next year with a First Timer and Gold Timer

History: Region VIII Past RVP Michele Epstein, MLIS, AIS, AAI, CPIW, DAE implemented the new tradition of the Gold Timer's designations at the 2006 Region VIII Conference in as Vegas. This new designation honors and recognizes those members of the Region that have attended at least 20 conferences and are part of the grand history of Region VIII and IAIP. This has transitioned to the Council Meetings.



## **CALIFORNIA COUNCIL TEAM**

California Council Director	Kari Woods, CLP
Council Consultant	Christine Chandler Tillett, PHR, CLP, CRIS, CIIP
Assistant to California Council Director – Southern CA	Brooke Lesniak
Assistant to California Council Director – Northern CA	Julia Alexander, CPIW, CISR
Public Relations Chair	Regina Lemanowicz, CLP
Public Relations Liaison	Annette Ing-Firmeza
Communications Liaison	Kim Cameron, CPIW, CLP
Education Liaison	Gina Thomas Patterson, CISR-Elite, CPIW, DAE, CLP
Legislation Liaison	Susana Baja, AINS, CPIW
MAL Liaison	Kim Green, AIC, AIS, CPIW
Safety Liaison	Elaine Sorensen, AIS, CIIP
Membership Development Chair	Marcella Beasley, MA, CIC, CISR, CRIS, MLIS, CCIP, CIIP, CLP, TRIP
Northern California Membership Liaison	Kelly Reese, AU-M
Southern California Membership Liaison	Christina Hernandez, AAI, CIC
Young & New Professional Membership Liaison	Sarah Jane Jara, CLP

## **California Associations**

### **Members At Large**

**Insurance Associates of Fresno**

**Insurance Professionals of Monterey Bay**

**Insurance Professionals of Santa Barbara**

**San Francisco Insurance Professionals**

**Insurance Professionals of Los Angeles, Inc.**

**Insurance Professionals of Orange County**

**Insurance Professionals of San Gabriel Valley**

**San Diego Association of Insurance Professionals**

**South Bay Association of Insurance Professionals**

**2021 California Council Committees**

<b>Committee</b>	<b>Chairman</b>	<b>Committee Members</b>
<b>Audit</b>	Chair – Kim Green, AIC, AIS, CPIW	Freeda Koopmans, AU, AAI
<b>Awards</b>	Chair – Sandy Joslin, AU, CIIP, DAE	Mark Coberly (HI) Keri Herlong, DAE, CPCU, CIC, CRM, CISR, ACSR, AIM, CIIP (NV) Sandy Malone, CLP, CIC, CISR, ACSR, DTM, CWC, CIIP (WA) Allen Shiu, FCIS Triscia Murphy, ACSR, CISR, CPIW <b>Brooke Lesniak &amp; Julia Alexander</b> <b>GAYLE RESKIN ANGEL AWARD</b>
<b>Bylaws/Standing Rules</b>	Andrea Gable-Setterstrom	Tish Riley, CIIP, DAE, CLP Susana Baja, CPIW, AINS Margaret Lamdagan, CPCU, CPIW, DAE
<b>California Council Fund</b>	Robin Fawkes, CIIP, CCLA, DAE	
<b>Credentials</b>	Mitula Patel, CLP	
<b>CWC Speak-off</b>	Regina Lemanowicz, CLP	Kim Cameron, CPIW, CLP Mary Moore-Campagna, CPCU, AAM, AAI, AAIF, AIS, ARP, ATM, CPIW
<b>Education</b>	Gina Thomas Patterson, CISR Elite, CPIW, DAE, CLP	Christine Chandler Tillett, PHR, CLP, CRIS, CIIP
<b>First Timers</b>	Annette Ing-Firmeza	Brooke Lesniak
<b>Historian</b>	Regina Lemanowicz, CLP	
<b>Meeting Secretary</b>	Jolene Galvan, ACSR, CPIW, CISR Elite, AIS, CPSR, AINS, DAE, CLP, MLIS	
<b>Minutes Approval</b>	Gail Novelich	Dawn Manzano, CISR, CLP, CIIP
<b>Parliamentarian</b>	Sue Zeider, CPCU, CLU, CPIW, AIC, AIS, ChFC, SCLA	
<b>Printed Program</b>	Betsy Johnson, CISR, CIC	Tina Lee Kelly Reese, AU-M Christina Hernandez, CIC, AAI
<b>Recommendations</b>	Lucille Shalometh, CPIW	Pat Park, CPIW

**2021 California Council Committees – cont.**

<b>Committee</b>	<b>Chairman</b>	<b>Committee Members</b>
<b>Silent Auction</b>	Kim Cameron, CPIW, CLP Christine Chandler Tillett, PHR, CLP, CRIS, CIIP Laura Gutierrez, CIC, CPIW	
<b>Tellers</b>	Keri Thompson, AINS, CIC	Allen Shiu, FCIS
<b>Time Keepers</b>	Mary Moore-Campagna, CPCU, AAM, AAI, AAIF, AIS, ARP, ATM, CPIW	
<b>YNP</b>	Margarita Casillas	Marcella Beasley, MA, CIC, CISR, CRIS, CCIP, MLIS, CLP, CIIP, TRIP

**Host Association Committees**

<b>Conference Co-Chairs</b>	Sarah Jane Jara, CLP Fredy Rodriguez
<b>Education</b>	Gina Thomas Patterson, CISR Elite, CPIW, DAE, CLP
<b>Fundraising</b>	Jody Nishida
<b>Printing / Program</b>	Jody Nishida
<b>Registration</b>	Keri Thompson, CIC, AINS
<b>Sponsors</b>	Sarah Jane Jara, CLP
<b>Swag Bags</b>	Sarah Jane Jara, CLP
<b>Treasurer</b>	Keri Thompson, AINS, CIC
<b>Zoom Liaison</b>	Sarah Jane Jara, CLP

**Meeting Sponsors**

Our heartfelt thanks and appreciation go out to our generous sponsors, members and sister associations, without whom, all of this would not be possible. Thank you to all that supported our efforts through your donations of time, money & support.



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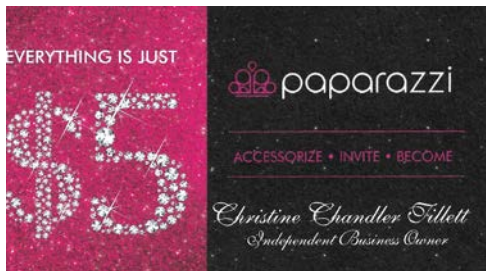
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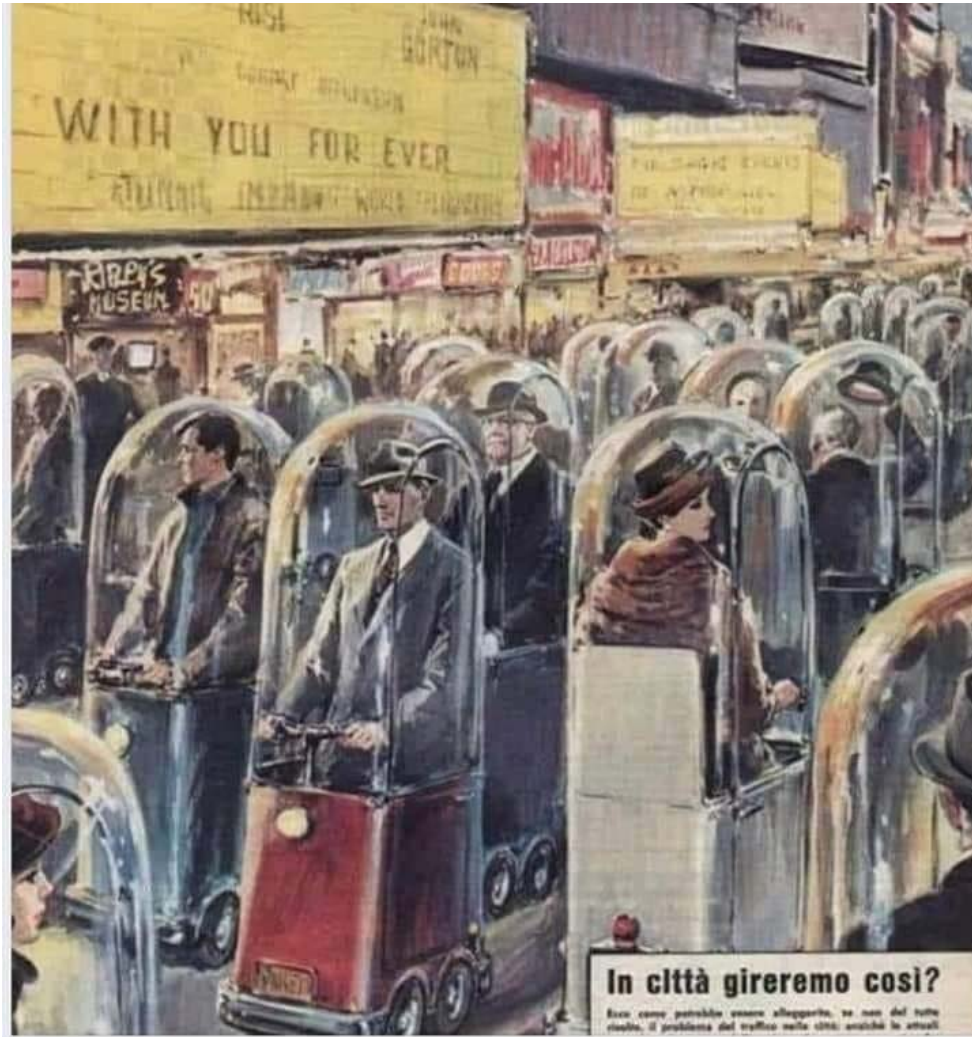
## Council Meeting Roster

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<b>Assoc</b>		
<b>Employer</b>		
<b>Contact</b>		



**THANK YOU FOR ATTENDING THE ANNUAL COUNCIL MEETING**  
**AND CELEBRATING OUR 1<sup>st</sup> VIRTUAL MEETING**  
**STAY SAFE.....SEE YOU AGAIN SOON.**



This is a 1962 illustration from the Italian magazine Domenica del Corriere depicting life in the year 2022