



California Council of IAIP

CALIFORNIA COUNCIL OF IAIP

2020-2021 CHAPTER REPORTS

Chapter Listing

IAOF	Insurance Associates of Fresno
IPLA	Insurance Professionals of Los Angeles
IPMB	Insurance Professionals of Monterey Bay
IPOC	Insurance Professionals of Orange County
IPSGV	Insurance Professionals of San Gabriel Valley
IPSB	Insurance Professionals of Santa Barbara
MAL	Members at Large
SDAIP	San Diego Association of Insurance Professionals
SFIP	San Francisco Insurance Professionals
SBAIP	South Bay Association of Insurance Professionals



Insurance Associates of Fresno

Greetings from Fresno, where we broke the record for 60+ days over 100 degrees!

Since our last CA Council, IAOF has maintained a virtual spirit with zoom general and board meetings, membership mixers, and game nights, but luckily we were able to end the year with our in person and virtual event in Orlando, of which five IAOF members were able to attend live.

On June 24th, 2021, IAOF met at Max's Bistro to install the 21-23 Board of Directors. President Marcella Beasley, Secretary Lou Ohki, Treasurer Kim Combs/Darlene Ayala, Parliamentarian/VP Kim Cameron, Directors: Lorey Ortez, Victor Echeverria, Robin Souza, and Alison Holmes. Membership Mixers: Hosted game nights and general meetings that highlighted members and their interests. New member Victor Echeverria recently opened Goosehead Insurance and gave a presentation that both introduced his business and presented some safety and legislative measures as he is the current Safety Chair. These game nights brought new and current members together to spur interest in IAOF and keep IAOF/IAIP on the community's mind.

Education: Due to a recent class on Zoom fatigue and possible questions related to in-person events in the future, Marcella proposed to the board that the IAOF newsletter and social media profiles promote the International education calendar. There are a lot of classes provided of which all members can access. Marcella was a panelist and educator for the Pete Fowler organization on Insurance 101. Robin Souza once again taught at the annual AFIS conference.

Awards: Marcella Beasley made it into the Top 5 for the 2021 Outstanding CSR of the Year competition with the National Alliance, including being named the 2021 Outstanding CSR of the Year for California, for the third consecutive year in a row. IAOF was presented with the Jeffrey Nordhaus Memorial Award for Education. Alison Holmes was presented with the Region VII Member of the Year award. Marcella was also awarded the AFIS designation scholarship. While not an official award, Kim, Marcella, Allie, Robin, with the help of Martha from Hawaii dressed up as the Spice (Geriatric) Girls and got 3rd place in the YNP Lip Sync battle!

Service: Robin Souza's term has ended as RVP with Alison Holmes as her assistant. Several of us served and continue to serve on the IAIP Task Forces. Kim Cameron and Marcella served on the Mastermind Pilot program that is replacing the Mentor/Mentee program. Marcella also served as a Co-Chair for the YNP SIC. Kim Cameron is a current co-chair of the Technology SIC.

We have continued to stay in touch by holding board meetings via zoom, including game nights, membership mixers, and other meetings/get-togethers. Marcella plans to release quarterly newsletter highlighting local, CA Council, Regional, and International events, promoting IAIP, and increasing our membership.

Respectfully submitted,

Marcella R. Beasley, IAOF President

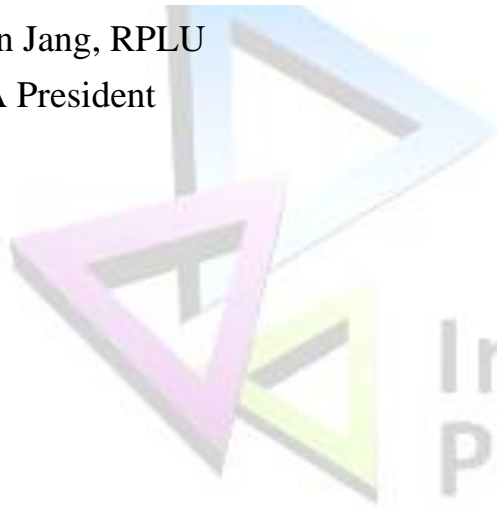


Insurance Associates of Los Angeles, Inc.

Insurance Professionals of Los Angeles did not have any in-person meetings due to COVID-19. There were a couple new members that joined, bringing us to 10 members. We are eagerly looking forward to council, and can't wait to see all new and familiar faces.

Sincerely,

Helen Jang, RPLU
IPLA President



International
Association of

**Insurance
Professionals**

California Council of IAIP



Insurance Professionals of Orange County

2020-2021 CA Council Annual Association Report of the Insurance Professionals of Orange County

The Insurance Professionals of Orange County (IPOC) continues to strive to be an active association of the International Association of Insurance Professionals. Although the COVID-19 Pandemic and lock-down in the State of California that affected our members family lives and work conditions with their employers, IPOC followed suit with that of so many other organizations and employers in switching to a virtual means of communication by utilizing ZOOM, members were invited to participate in association meetings on a virtual basis, as well as attend the communal meeting with the CA Council of IAIP yearly meeting.

With so many businesses ordered closed by the Governor of the State of California, IPOC's normal meeting place at the DoubleTree Club in Santa Ana was closed and their facilities were unavailable for the entire 2020-21 year after the March 2020 state lock-down. "Live" activities on a statewide basis were cancelled, employees were sent home to develop work stations in a virtual capacity, and the entire world changed focus and started conducting business in a ZOOM world. IPOC created our ZOOM account in April 2020 in order to conduct our board and membership meetings, and we all began learning how to participate/present on a virtual basis.

IPOC's Board Members rolled up our sleeves and went to work reviewing and revising our Bylaws to bring them in to line with current social restrictions. The decision was made to go to a Quarterly Meeting Schedule beginning immediately after Installation of Officers in June 2021.

IPOC held an auction for an i-Pad through December 30, 2020 which was met with great success.

Fellow IAIP Member Allen Shiu, AFIS (San Francisco Insurance Professionals), Head of Brokerage at CK Specialty Insurance was Guest Speaker for October 2020 with his A to Z's of Cannabis Insurance presentation, which was followed by In the Workplace and COVID-19 by Horsemen Investigations in November.

We held our annual holiday social in via ZOOM on December 2, 2020 where our members and guests honored IPOC's tradition of "Giving Back to the Community". This year, our Charity of Choice was again Mary's Kitchen, and IPOC proudly presented Gloria Seuss, Director of Mary's Kitchen a \$500.00 monetary donation to this worthy charity from the proceeds of our fundraiser. Several members also donated from Mary's Kitchen's "Wish List" of clothing, personal hygiene items, shoes and plastic bags for use in packaging lunches & dinners.

Gloria from Mary's Kitchen expressed gratitude on behalf of their clientele for the donations as there are always so many in need during the holidays due to inclement weather – this year was no exception due to the extra circumstances surrounding the COVID-19 Pandemic.

After the holiday season, IPOC's Board Members rolled up our sleeves and went to work reviewing and revising our Bylaws to bring them in to line with current social restrictions. The decision was made to go to a Quarterly Meeting Schedule beginning immediately with Installation of Officers in June 2021. It was noted that with every ZOOM meeting we held, IPOC members were not attending with the exception of current board and committee members. Everyone was getting burnt out on ZOOM meetings in their daily work life and declining to attend after hours meetings – many expressed they prefer “live” meetings.

IPOC's extremely popular Fashion Show – The Art of Style originally scheduled for April 18, 2020, was again cancelled in April 2021 due to unavailability of facilities and COVID-19 lockdowns, hotels/motels/restaurants were still closed, and of this writing, the state of live events is slowly trying to rebound but is extremely uncertain. One of our partners WHW (Women Helping Women and Men back to work) and their retail outlet, Deja New – was unable to withstand the forced business closures in the State and has since merged with Working Wardrobes. At present time, this event has tentatively been rescheduled for Spring 2022 in hopes the COVID-19 Pandemic has finally been beaten.

Due to lack of participation from students from Cal State Fullerton Center for Insurance Studies, IPOC made the decision we would no longer offer scholarships to the college and instead set-up a scholarship fund to assist our local membership with their educational needs.

Membership Chair Freeda Koopmans, AU, AAI has diligently stayed in constant contact with IPOC membership throughout the year by sharing membership news, educational opportunities and events. IPOC added 3 new members through the year as well as regained a former member who rejoined in March 2021.

As Hospitality & Reservations Chair Carolyn Espinoza sends timely birthday, get well and sympathy greetings to all members. In her dual role as Treasurer, Carolyn maintains the association's bank records and pays all bills in a timely manner.

Secretary Regina Lemanowicz earned her CLP which was big cause for celebration! As our Awards Chair, Regina submitted IPOC for the E.C. Smith Jr Memorial Award for Community Action at the Region VII Conference. Under her direction, IPOC awarded the Hall of Fame Award to Annette Ing-Firmeza; Insurance Professional of the Year to Gina Thomas Patterson, CISR Elite, CPIW, DAE, CLP, Member of the Year – Regina Lemanowicz, CLP (she didn't know about this one, we snuck it in on her).

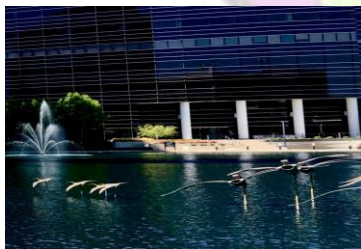
Freeda Koopmans, AU, AAI and Regina Lemanowicz, CLP attended the Combined Claims Conference in August 2021 and networked with their vendors and members, inviting everyone to check out IAIP and join our association. Safety Tips were shared by Freeda with our members on a continual basis from Cal-OSHA, OSHA – these are also shared with the CA Council associations in the state.

IPOC Members continue to leave their marks of excellence in the workplace and in their daily lives. With the arrival of the COVID-19 Virus and resultant shut-downs, IAIP's International Convention in June 2020, and the 2020 CA Council Meeting on October 9-10, 2020 were held virtually as was the 2021 Region VII Conference. IPOC Members were in attendance for all 3 virtual events and served as needed. IPOC President Gina Thomas Patterson presented IAIP's I CAN! A Step Above – Inland Marine course at the 2020 CA Council Meeting for those members needing IAIP credits to earn or renew their CIIP/DAE Designations.

IPOC members continue to volunteer for IAIP positions outside of our local association, Regina Lemanowicz, CLP was elected as CA Council Public Relations Chair, and Gina Patterson as CA Council Public Relations Liaison in Education.

IPOC is extremely grateful to our dedicated members and guests for all their support, contributions, volunteerism, and being there for one another.

In Fellowship,
Gina Thomas Patterson, CISR Elite, CPIW, DAE, CLP
Insurance Professionals of Orange County 2021/22 President





Insurance Professionals of San Gabriel Valley

INSURANCE PROFESSIONALS OF SAN GABRIEL VALLEY INC. 2020 – 2021 Annual Report

Our Association monthly meetings are being held virtually, however we have been consistent with our meetings and membership renewals.

IPSGV attended Region VII Conference, CA Council Meeting

Our Association donated to Shepard's Pantry and to the Los Angeles Mission. We participated in the City of Hope "Walk for Hope" to raise money for their cause. We are participating in this year's virtual walk.

We look forward to 2022!

In fellowship,

Sylvia Coronado, CISR, CWCS, CPIW

Insurance Professionals of San Gabriel Valley, Inc.





Insurance Professionals of Santa Barbara

The Insurance Professionals of Santa Barbara Association scaled down operations during the COVID 19 pandemic.

We were not able to have our fund raising events during the year due to the State restrictions. Even though we were not allowed to have our events, our Association continued to give back to the community with a sizable donation to SDIAP.

We look forward to getting back to sponsoring in person meetings and our signature events.

Carol Reynolds
IPSB President

International
Association of
**Insurance
Professionals**

California Council of IAIP



San Diego Association of Insurance Professionals

This is my first term as SDAIP President and I chose the theme of **Share The Vision**. I was installed in June of 2021 at our first in person meeting since before March of 2020. I have to say, our June Officer Installation and Award Ceremony was well attended and a breath of fresh air for myself and all who attended!

Although we were virtual up until the June Installation dinner, our organization did a lot this past 2020 – 2021 term! The board and members are busy with at home schedules but continued to find time to invest in themselves by attending our virtual meetings and participating in our community outreach programs.

We continue to work hard to grow our membership and retain our current members. We hope the next year outlook is better once we can meet in person on a regular basis but understand we need to figure out new ways to encourage members to purchase memberships on their own, without the monetary donation of their companies.

October of 2020 term started with our Golf Ball Drop event, partnering with PWI, raising over 10K. We also participated in a “Walk to End Alzheimer’s”, fundraising \$6.5K, proudly taking 2nd place compared to all the other participating companies. To provide better context, SDAIP only raised less money than Qualcomm!

November, we held our annual Donation Drop for Charity, collecting paper products, socks, underwear, and toilet paper. We also held a well-attended educational business meeting, partnering with WCIRB, during a standard business hour rather than after hours. The topic was “What the New COVID-19 Workers’ Compensation Rules Mean to you”.

In December, we got creative and hosted a virtual Ugly Sweater Contest and Cooking Class Party! Although we didn’t individually cook the meals, we were impressed by the chef’s presentation and ability to make a wonderful looking steak. We also learned you should wear shoes while cooking in fear that you could drop a steak knife into your foot, courtesy of one of our members! We all came dressed festively and had a wonderful time celebrating the upcoming holiday although we couldn’t be together in person.

January we were back to virtual business despite everyone feeling the virtual fatigue. We started the year off with Virtual Bingo and a Membership Drive, bringing on board four new members and one returning one – can you say BINGO?!

February we held a regular educational business meeting on the topic of “Medicare and Your Options.” The topic was well received given our aging work force and aging parents.

March we celebrated the spring break holiday by hosting a Spring Fling, Virtual Bonnet Contest and Scavenger Hunt. We decided to keep with the CBD/cannabis annual theme and in April hosted an educational business meeting on “CBD and Pain Management”. Finally, ended the year with a Virtual Happy Hour and Online Yard Sale in May.

Community Outreach continues to be a big part of SDAIP, we currently have a total of six charities that we support every year; Rachel's Women's Center, San Diego Alzheimer’s Association, The Royal Home Senior Facility, YWCA Becky's House, Blind Community Center of San Diego, and The Office Professional Training Program. For the past thirteen years we have served lunch at Rachel’s Women’s Shelter every Saturday. This year we were not able to serve the food but we always had an SDAIP member available to drop off the food in the morning. We also raised money to buy a karaoke machine for Royal Home and collected paper products for YWCA Becky’s House.

We had a successful summer planning meeting for the upcoming term. PWI and SDAIP partner annually for a golf tournament but in lieu of the tournament, we hosted a golf ball drop on September 9th to raise money for our charities. October 23rd we will meet for our community action walk for the San Diego Alzheimer’s Association. We also plan to host our annual donation drive for the entire month of November. Lastly, we plan to bring our SDAIP group together to take a limo ride to see local Christmas lights which will support a strong finish for our SDAIP 2021 calendar year! We know our charities need support and we are working hard to think outside the box to host both virtual and in person events.

As you can tell, SDAIP members take volunteering seriously. Not only are our members busy with our local organization, many are participating on the International scale! Members servicing the CA Council are Regina Lemanowicz as Public Relations Chair and Christina Hernandez as the Southern CA Membership Liaison. Regina is also servicing as the Region VII Marketing Director and Dawn Manzano is busy running her candidacy for 2022 CA Council Director Elect.

Members attended the Virtual Region VII Conference in March where SDAIP was presented with the Region VII Association of the Year. Then in June, Dawn Manzano and Christina Hernandez represented SDAIP at the International Convention in Orlando. Come this October, SDAIP is hosting the 2021 CA Council of IAIP.

Many thanks to the SDAIP members for their involvement and we look forward to another successful year.

In Fellowship,

*Jacquelyn Coyle
President, SDAIP*



San Francisco Insurance Professionals

Due to the pandemic, we were unable to participate and plan many social events. We are extremely grateful that we did not hear of any of our members remaining healthy. In June, we held a virtual installation with Laura Gutierrez as our installation officer. She's always a crowd pleaser with her vivacious personality!

We had a virtual Holiday event in which we exchanged cookie recipes and played virtual bingo for gift cards. It was so nice to see our members from a distance. Everyone was happy to be able to see and talk to one another. To keep in the joy of giving, our chapter donated \$250 to buy pizzas and rotisserie chicken for the "Love A Child Homeless Shelter". Jenny Chea-Vaing spearheaded this charitable event we also donated warm blankets and bought Christmas presents to every woman and child at the shelter. They were extremely grateful for all of gifts, toiletries, and food. We plan to do this again. We also donated \$250 to The Marin C. Kauffman 100 Club of Alameda County. This Club's mission is to provide financial assistance to families of Police Officers and Firefighters killed in the line o duty in Alameda County and provide college scholarship to the children.

Congratulations to Jenny Schaeffler on being selected by the Legacy Foundation for a scholarship! Jenny completed all the requirements necessary to receive IAIP's Certified Leadership Professional (CLP) designation. To achieve this designation Jenny completed a 52-hour, 17-module learning program aimed at developing essential leadership skills for career development. A major part of IAIP's belief system is that the more a professional knows about their industry; combined with communication and leadership skills, the better she/he is able to serve their customers, company and the insurance industry in general.

Rae Lynn Zachary is chairing the fundraising raffle for electronic devices (Samsung Chromebook or FitBit – Inspire 2 Fitness Tracker or Ring – Video Doorbell 3 plus and also donating her custom-made jewelry set by Dazzy Jewlz to raise money for the 2022 Ca Council. Annette Ing-Firmeza, Tina Kong and I are putting on our aprons and baking various varieties of banana breads to help with the fund-raising – please help support all of our fund-raising events.

On March 23, 2021, we held our first virtual Lunch N Learn education workshop. Unfortunately the guest speaker, James Bailey, Principal Marine Surveyor at NVI was on a unexpected job and his manager, Jim Cloutier, President & CEO stepped in to talk about Identifying Key Indicators in Trip N Tow, Conditions and Suitability and Valuation Surveys, Understanding and Assessing Crew Makeup and Capabilities, Utilizing Real-Time Reporting to Bridge the Risk Gap Between Owners, Insurers and Operators.

We are in the planning stages for our September Giants Tailgate event and that is always a great event.

In Fellowship,

Marie Meadows
SFIP President 2019-2021



*South Bay Association
of Insurance Professionals*

South Bay Association of Insurance Professionals

During my 2020-2021 term as President, SBAIP did our best with the constraints of being in a pandemic and were able to get together virtually, not only with our local members, but also with other associations members, which was a very nice bonus!

SBAIP was able to hold virtual meetings as follows:

On September 10, 2020 we held our Installation and Awards virtual meeting. Luckily, I was able to keep the same cabinet of Officers to assist me in pushing through these trying times. We were also able to award Margaret S. Lamdagan with our most prestigious award as the SBAIP Insurance Professional of the Year. Also, in September we participated for the second year in row in the Walk to End Alzheimer's, however this year it was mostly a virtual endeavor, although you could get out and walk where it was safe and comfortable for each team member. Looking forward to doing it in person next year if the circumstances will allow.

On October 9th & 10th, 2020 we successfully hosted California Council virtually for the first time ever. We had a handful of Members who truly came to bat to make this virtual meeting happen, along with the support of the CA Council Team and Committees.

The team voyaged ahead into this uncharted virtual territory and were able to engage many sponsors, provide educational opportunities, have a Welcome Party, put on the CWC competition, enjoyed an exceptional Keynote Speaker, held a Silent Auction, had the business meeting, and held the Awards presentation, but most impressively we got the registration material and swag bags out to all attendees by mail. Also, we were able to utilize the sponsorship funds we raised to support the 2021 CA Council host association, the Legacy Foundation & other charities. We remarkably had over 50 members in attendance.

On December 15, 2020 we held our Annual Holiday Party virtually where we played holiday bingo, wore some holiday gear & enjoyed each other's company.

On February 16, 2021 we held our Bi-Monthly Meeting virtually on the Topic: COVID Disinfecting by PRC with our very own Fredy Rodriguez presenting on such a currently relevant subject.

It was also nice to have other association members and non-members join us.

In April 2021 we participated with PRC again in the Virtual Walk for Kids to Benefit the Ronald McDonald House of Long Beach.

On June 8, 2021 we held our Installation of Officers virtual meeting welcoming Jody Nishida as the new President, Jennifer Deinert-Peterson as 1 st Vice President, Rosemary Gomez as Secretary and continuing as Treasurer, Keri Thompson. Regina Lemanowicz was the Installing Officer and did a beautiful job. Also, Gina Thomas Patterson and Margaret welcomed me into the Co-Pilots club while becoming the Immediate Past President.

In Fellowship,

Sarah Jane Jara, CLP
2019-2021 President



California Council of IAIP