



# IAIP Region VII



Summer 2022  
In this issue:

RVP Greeting - Region VII Directors  
EC Connection - IAIP Education Calendar-  
New Members-New Designees - NAIW  
Legacy Foundation Report – Region VII  
Conference – IAIP Roster Update-Corporate  
Partner and Talent Development Program &  
More

<https://iaipregion7.org/>

**LEADERSHIP-EDUCATION-ACHIEVEMENT-DEVELOPMENT**

"It Takes A Region"



## *Conversations with Christine*

*Region VII RVP, Christine Chandler Tillett, aPHR, CLP, CDP, CRIS, TRIP, MLIS, CIIP*

Greetings Region-VII members.

As I step into my second term as your Region VII Vice President, I must ask myself where did that last term go? Wow!

I looked back at the past year to reflect, and we have accomplished a great deal. We issued four quarterly newsletters that was ram packed with information (thanks Regina), distributed 12 monthly communications on the website as well as the Region VII FB

page, updated the Region VII Awards Manual, revamped the Region VII website, broadened members educational opportunities throughout the states with timely notifications, met the challenge of the Capital Campaign

goal, met the challenge of the Legacy Foundation "Knock It Out of the Park" goal, had select members contributing their time to task forces, CLP-A educational recordings and hosting SIC groups as well as having our 1 st successful Region VII HUB. That is something to be proud of. Shut the front door to that!!!

One of the main goals of mine was to increase membership but I can honestly say, I was not successful in this regard. A couple of local associations that did increase membership (shout out to those local associations that grew); however, many did not.

During the last term, we lost four local associations (Insurance Professionals of Greater Seattle, Las Vegas

Insurance Professionals, Insurance Professionals of Anchorage, and Insurance Professionals of Helena) but with those associations working with Terri Brennan and Amanda Hammerli, many converted to MAL's. The goal this term is to keep members as well as obtain new ones.

You also saw development through IAIP as they introduced a new website, advanced CLP course, real time Insurance Professional magazine blog, an online chat circle (like FB) and bringing a new Learning Management System (LMS). I spoke about these at our Region VII HUB conference. We were a small group of thirty at the conference, but it was successful, and I want to thank the Co-Chairs Mitula Patel, CLP and Terri Brennan who really put it all together. We came out slightly ahead and the excess funds will be dispersed to upcoming Region Conference hosts (still looking for 2024 and 2025).

One thing that was resounding was the decline in membership. I know that COVID put many associations at a standstill, but I hope that as we start to come out of this pandemic, that the local associations start to meet and build again. There are so many educational opportunities to attract and retain members. I want to bring back members that left IAIP. I want them to look at what has changed and how far we have come as an organization. But what is change without sustainability? We need every member to do their part. Some say it takes a village, but I say, it takes a Region. Share with coworkers, bosses, your networking pool, about IAIP and why you are a member of this organization. You have a reason, share it. Bring a potential member to a meeting. Share what you learned from IAIP: education classes, presentation skills, awards, designation(s) etc. with your coworkers. For sustainability we need to retain our existing members but branch out and attract new members. We must light a fire and excite those around us as why we belong to IAIP. It truly is not sustainable to be stagnant.

Just to be clear, what I am saying is that we all need to pitch. Whether you are in a local association or are a member at large, we need all of you to work on membership. As I stated previously, we are not sinking we are just on soft ground. We need to stabilize the region and I have the team to do that but need the support of EVERY member to solidify that foundation.

IAIP is not a little secret that you keep to yourself. If you have ever received a designation, scholarship, award, CE credits, taken an education class(es), share that news!

Tell your manager, HR, coworkers how IAIP played into your development. Your recognition is also your employers' recognition so use that as an introduction to your employer. It is free advertisement for your employer when your name is mentioned; your employer is mentioned as well.

I am challenging each one of you to bring someone new to IAIP. We are a powerful Region. We can compete with the best of them. So, let us do this. We had a rough year, but now it is time to shake it up. 2022-2023 is the year of growth. Together, we will be awesome. I am still taking the L.E.A.D.; however, I am infusing it with IAIP - We Miss You, We Want You Back campaign for non-renewed members as a guide back to Region VII for sustainability and growth.

I want to welcome my strong Region VII team for a second year. When you have a moment, please look at the Region VII team on the website. I am excited to be collaborating again with these talented members and their liaisons. Marketing Director –Regina Lemanowicz, CLP, Membership Director- Sarah Jane Jara, CLP, Education Director – Keri Herlong, CPCU, CIC, CRM, CISR, ACSR, AIM, CIIP, CLP, DAE and MAL Director– Terri Brennan. My assistants, Laura Gutierrez, CIC, CPIW and Mitula Patel, CLP

With 2022 Region VII Conference under our belts, we will focus on 2023 where we will be in Hawaii. I will be working with the Honolulu Association of Insurance Professionals (HAIP) in planning a great conference. I am hoping that all members come to the 2023 Conference at the Prince Waikiki hotel, Honolulu, HI. Look for upcoming notifications from HAIP with more details but put in your vacation requests now for April 27 th – 29 th.

If you would like to work on a team, please reach out to me. If you have recommendations to help increase or sustain membership, please share, and talk to me.

In Fellowship,

Christine

Christine Chandler Tillett, aPHR, CLP, CDP, CRIS, TRIP, MLIS, CIIP

**L**eadership **E**ducation **A**chievement **D**evelopment

## EC CONNECTION



Greetings from your IAIP Board of Directors! It's July, we are back to reality from a fabulous Convention! Louisville was a great location and the Convention was filled with something for everyone- continuing education, CLP and CLP-A classes, Community Café sessions, our beloved CWC competition and Awards celebration, an incredibly engaging keynote speaker, an innovative spin for the Membership Meeting and ...lots of fun!

This month marks the beginning of our new IAIP year. We will have our first Board meeting and we will review our Strategic Plan and continue working on our objectives. We also received suggestions and ideas from the Convention Membership Meeting that will be reviewed by the Board and forwarded to the appropriate Task Force for completion. We have a lot of work to do again this year.

We need to continue the growth and marketing of our educational products. This is essential for IAIP's success. We want to review and possibly update our communication channels. We want to implement our Learning Management System and continue to add classes to the system. These are just a few items we intend to work on this year. We cannot achieve our goals without you! Please get involved.

Volunteer for a Task Force. Take a class, offer to teach a class. Renew your membership. Contact a fellow member and encourage them to renew their membership. Bring a potential member to a meeting, they will be hooked! Partner with a newer member to make sure they know all IAIP membership has to offer. Provide a Corporate Partner/Member tip for IAIP to pursue.

Thank our sponsors for their support. Remember that we will need funds to achieve our goals!

IAIP has a great, cohesive Board of Directors who are eager and excited to get to work. We are looking forward to another productive year. Please continue to forward your ideas and suggestions- we need you and your support! Together, we will continue IAIP's vision of being the leading provider of education, skills enhancement and leadership development to the members and partners of our industry!

Yours in Fellowship,

Diane F. Martell, FCLS, CIIP, DAE, CLP

IAIP International President 2022 - 2023

### LINKS

[Int'l Association of Insurance Professionals](http://iaipregion7.org)

<http://iaipregion7.org>



04-01-2022 to 06-30-2022

**WELCOME**  
NEW & RETURNING MEMBERS!

Andrew Core  
Ivy Costa  
Dave Heard

**NEW**  
**DESIGNATIONS**

Please let us know if you have earned a new designation. We would love to share.

## Regional Directors

### Education Director:

Keri Herlong, CPCU, CIC, CRM, CISR, ACSR, AIM, CIIP, CLP, CRIS, DAE

### Marketing Director:

Regina Lemanowicz, CLP

### Membership Director:

Sarah Jane Jara, CLP

### Member At Large Director:

Terri Brennan

## Council Directors

### CA Council Director:

Dawn Manzano, CISR, CLP, CIIP

### Hawaii Council Director:

Martin Beardeaux, AIDA, ARM-E, AINS

## IAIP Education & Events Calendar

8/9/2022 » 8/11/2022	<u>Advanced CLP Virtual: How to Manage Your Emotions</u>
8/15/2022	Poolside Chat with the Region VII RVP
9/14/2022 » 9/15/2022	<u>Advanced CLP Virtual: Resilience</u>
10/7/2022 » 10/8/2022	CA Council of IAIP Meeting – San Ramon, CA
10/11/2022 » 10/13/2022	<u>Advanced CLP Virtual: Women and Leadership</u>
11/7/2022 » 11/8/2022	<u>Advanced CLP Virtual: Systems Thinking</u>

Virtual Town  
Halls

Please check the website for any upcoming Virtual Town Hall dates.

[www.internationalinsuranceprofessionals.org](http://www.internationalinsuranceprofessionals.org)

# POOLSIDE CHAT

**Join your Region VII RVP and team for a  
poolside chat.**

**Plan to join us for important updates, your  
chance to ask questions and time to chat with  
fellow members.**

*Mark your calendars for August 18, 2022 - October 20, 2022 -  
December 15, 2022 - February 16, 2023 April 20, 2023 - June  
15, 2023*

## POOL RULES



1. Be updated
2. Be informed
3. Be interested
4. Be there



# LOUISVILLE, KENTUCKY 2022



*Region VII in Louisville*



*They said have fun!*



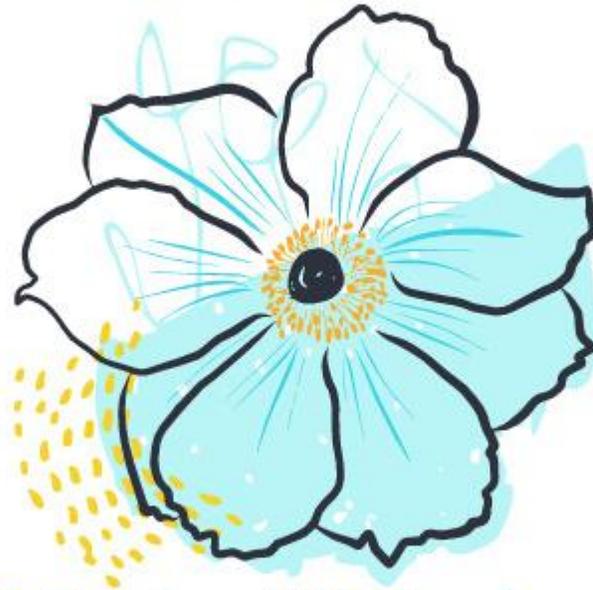
## 2023 REGION VII CONFERENCE

APRIL 27-29, 2023 – HONOLULU, HI

HOSTED BY: HONOLULU ASSOCIATION OF INSURANCE PROFESSIONALS

Registration opens fall 2022

# *Return to Paradise In 2023*



IAIP Region VII Conference  
April 27-29  
Honolulu, Hawaii

[www.haipro.biz/region7conference](http://www.haipro.biz/region7conference)

You are invited to attend the 2022 CA Council of IAIP Meeting.

See flyer for details. You can register at [www.caciaip.org](http://www.caciaip.org)

**2022 CA Council Meeting – “Join our Crew in 2022”**  
 Hosted by the San Francisco Insurance Professionals  
 October 6-8, 2022



**Hotel Reservations are now OPEN!!**  
*San Ramon Marriott, 2600 Bishop Drive, San Ramon, CA 94583*  
 ✦ *Note: This is a Pet Friendly Hotel!!*

**Room Rate: \$149 per night - Available October 6 to 9, 2022**  
**Last date to book at the conference rate: September 8, 2022**

To make your reservations online use this link: [BOOK YOUR GROUP RATE FOR SFIP OCT2022](#) (limited King Options Available)  
 Or call the hotel at: 925-867-9200 and use the code: **SFIP Oct2022**

**Getting There:**  
 The closest airport is the Oakland International Airport (23 Miles) and the hotel is close to BART (7.1 Miles or at 13 minute UBER ride).

**Attractions / Amenities:**

- There is a shopping center adjoining the hotel – The Shops at Bishop Ranch, including a Target and Whole Foods Market and lots of dining options.
- Two small casinos within 20 miles – The Park West 580 and Livermore; The Graton Resort & Casino in Rohnert Park is 77 miles away
- Close to multiple wineries in the Livermore Valley Area - [www.livermorewinetrails.com](http://www.livermorewinetrails.com)

The Host Committee is hard at work planning your education opportunities, the business sessions, and a fun Wine Event. Stay Tuned for more details!!

**Any questions? Contact:** Marie Meadows at [mmeadows@intactinsurance.com](mailto:mmeadows@intactinsurance.com) or Annette Ing-Firmeza at [Annette.ing-firmeza@aon.com](mailto:Annette.ing-firmeza@aon.com)

## Region VII Directors

### Education

We are in the thick of summer, but education has not slowed down at IAIP in Region VII. I am thrilled to advise that our wonderful Education Liaisons from the 2021/2022 term (Martha Nobriga and Gina Thomas Patterson) have committed to continuing to serve Region VII members for the next term. We are all looking forward to the many educational offerings this year, including what will be available in April at the 2023 conference.

Speaking of the conference, I have some questions for you:

What's better than going to the Region VII Conference?

Going to the Region VII Conference in Hawaii!

What's better than going to the Region VII Conference in Hawaii?

Going to the Region VII Conference in Hawaii and seeing your name listed as having attained a designation.

There are so many opportunities to earn a new designation, renew an existing designation, or be one of the first to add that "A" after your CLP designation for the Advanced series that is now available. The CLP-A classes are offered virtually from July through February (except no class in December). Advanced CLP courses also qualify for use toward CLP renewal, so if you are in that "in-between" time, you get double duty by taking CLP-A classes!

While you're enjoying your summer, keep an eye out for future newsletters and our monthly emails bringing you details on educational opportunities in Region VII and let's make 2022/2023 your best education year yet!

Region VII Education Director: Keri Herlong, CPCU, CIC, CRM, CISR, ACSR, AIM, CIIP, CLP, DAE, CRIS  
 Region VII Education Liaison : Martha Nobriga, CPIW, CPSR  
 Region VII Education Liaison: Gina Thomas Patterson, CISR-Elite, CPIW, CLP, DAE

### Marketing

Welcome to a new fiscal year for IAIP. Chenise and I really enjoyed serving as your Marketing Director and liaison last year and we are excited to start the new term.

Associations are starting to have in person meetings and events and that is good news. Remember to send us your meeting dates and fliers so we can post them on the website and our social media pages. That will give you an extra bit of advertising and hope help with attendance.

It is time to start working on your award submissions and celebrating all your successes over the last year.

If you are traveling this summer check the International website to see if there is an association in that area and consider attending their meeting. I promise you will be welcomed with open arms.

Every time I attend a meeting when I travel I make new friends and come home with new ideas. And that is a win!

In fellowship,

Region VII Marketing Director: Regina Lemanowicz, CLP  
 Region VII Marketing Liaison: Chenise Blalock

## Membership

Hi Region VII,

As we head into the next term with our fearless leader Christine Chandler Tillett, I will continue as the Membership Director with my returning liaisons, Mark Coberly (HAIP) over AK & HI, Annette Ing-Firmeza (SFIP) over CA and new onboard, Sandy Malone (WA MAL) over BC, OR & WA.

Hats off to HAIP for bringing in 12 new members last term! Our other associations brought in some members as follows: SDAIP-4, IPOC-2, IAF-2, IPLA-1, SBAIP-1, IPA-1, GSIP-1, CA MAL-1 & OR MAL-1 for a grand total of 26 new members in our last term. I'm hoping if we can stay in person over this new term so that we can double, triple or even quadruple that number!

SDAIP has gotten us started with 1 new member since this term started. Our team will be working together to come up with some ideas and incentives we can pass onto your locals to hopefully drum up some more interest in joining IAIP.

Please let me know if you have any ideas and we'll be happy to entertain them! Outside of that, I hope you're all having a wonderful summer and staying healthy! I hope to see some of you at California Council in the fall!

In fellowship,

Sarah Jane Jara, CLP Membership Director

Membership Team  
Sandy Malone, CLP, CISR, ACSR, DTM, CWC,  
Membership Liaison  
Annette Ing-Firmeza, Membership Liaison  
Mark Coberly, Membership Liaison

## Members At Large

Would you like to win a \$25 Gift Card? I am still looking for help coming up with ways our MAL Members can come together for a "Group" Community Action Event. Anyone who submits an idea will be put in the drawing for the gift card!

Without a Local Association or Council, it makes it hard for those with a heart for community action to give back on behalf of IAIP. What's your "favorite" volunteer opportunity? Send me your ideas and we'll pick a date and find a special way to give back to our local communities - together. Submit your idea(s) to my email below. We'll take a vote – and pick a date in Sept or Oct to participate. Send your ideas to me at: [brennata@gmail.com](mailto:brennata@gmail.com)

I was so exciting to be able to see so many Region VII members at our Regional Hub Conference in Louisville KY back in June. We had a great Regional Dinner at The Old Spaghetti Factory.

Thank you to all who attended and made our first Regional Hub a success. Many of us were able to enjoy some free time to explore the many sights in town such as: Church Hill Downs; Muhammed Ali, Louisville Slugger and Frasier Museums, some great food, and a little shopping close by too.

Many of us took a relaxing 2-hour ride on the Belle of Louisville – down the Ohio River and saw amazing sunset views. We all stayed and attended the International Convention, which was full of education, community café sessions, awesome speakers, maybe a little betting on mock horse races as a fundraiser, some mint juleps, Family Feud, installation of our new IAIP President Diane Martell and much, much more. I believe a good time was had by all.

For most of us, our IAIP membership came up for Renewal on June 30 th . It's not too late, if you've missed the date, please just log onto the IAIP Website where you can renew very easily on-line.

In Fellowship,

Terri Brennan  
MAL Director

## *We Miss You – We Want You Back!*

### Dawn Manzano, CISR, CLP, CIIP – CA Council of IAIP Director

- Q:** What one change or improvement has IAIP made recently that has been the most beneficial to your membership?
- A:** *There are so many things that have been improved recently. Where do I even start? I think that one of the areas that have been most beneficial is the Website.*
- Q:** What's new with IAIP that a former member might not know about?
- A:** *Advanced CLP - Connection app within Website – Newsfeed -Career Development*
- Q:** What do you feel is the best reason for a former member to come back?
- A:** *There are so many reasons for a former member to come back IAIP has been working diligently to make themselves stand out amongst other associations. Is your employer looking for new training for your office. Have you introduced them to the Talent Development? Corporate Training Corporate memberships. Expand your network of contact across the United States*

### Martin Beardeaux, AIDA, ARM-E, AINS– Hawaii Council of IAIP Director

- Q:** What one change or improvement has IAIP made recently that has been the most beneficial to your membership?
- A:** *The hub format for the Regional and International Conference was a great idea and very efficient. Being my first IAIP conference, it was great being able to meet and network with members from all different regions. Starting off with the Regional was a nice option leading up to the big event.*
- Q:** What's new with IAIP that a former member might not know about?
- A:** *I think that former members would very much like the new IAIP website, which is more streamlined and user friendly.*
- Q:** What do you feel is the best reason for a former member to come back?
- A:** *There is a lot of new blood on HAIP's board, including new members serving as Secretary and Treasurer. The energy and enthusiasm is palpable as we look forward to hosting the Region VII conference in 2023.*

**ASK YOURSELF THESE THREE QUESTIONS AND CALL A FORMER MEMBER AND HAVE A CHAT!  
TELL A POTENTIAL MEMBER WHAT IAIP HAS TO OFFER.**



## **IAIP Program Links:**



Already earned your CLP but want to advance your leadership skills even further? Continue to develop your inner leader with the IAIP's Advanced Certified Leadership Program. [Learn how you can earn your CLP-A.](#)



Connect, share and learn from IAIP members from across the country interested in similar aspects of the industry. Browse our dynamic topic options and choose one or more to join today. [Find out more.](#)



[FOUNDATION WEBSITE](#)



**Corporate Partner Program**

[\*\*CORPORATE TALENT DEVELOPMENT\*\*](#) - WE MAKE DEVELOPING YOUR TEAM EASY

### **IAIP CAREER CENTER**

[\*\*CAREER RESOURCES\*\*](#)



[\*\*BECOME A MEMBER\*\*](#)



[\*\*SEARCH RESUMES\*\*](#)



# IAIP MEMBERSHIP ROSTERS

**Note:** There is a new directory resource in place that provides real-time member data. Learn how this new directory resource works by viewing the [Directories Guide \(pdf\)](#). The use of the roster system will no longer be updated after 9/30/2022.



## Directory Guide

Please use this guide to access and use IAIP directories as needed. If you need further assistance, have questions, or need additional member information, please contact us at [membership@iaip-ins.org](mailto:membership@iaip-ins.org).

(Note: Federal privacy laws prohibit selling of mailing addresses and electronic addresses to third party sources or providing them for marketing purposes without written permission of the individual.)

### I need to:

- [Access a Directory](#)
- [Export a Directory](#)
- [Identify Directory Information](#)

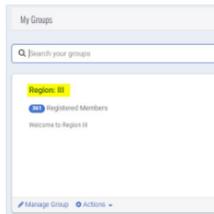
### Access a Directory

Directories can be accessed at the local, state, and regional levels. Each directory provides real-time member information. Only members have access to the directories for the groups they are assigned to. (Note: At times, staff members and board members will appear within a directory due to administrative needs.)

1. Log into your IAIP account.
2. Click **Groups**.



3. Click on the **Local, Council (State) or Region** group listing for the directory needed.



4. Click **Pages**.
5. From the drop-down menu, Click **Membership Directory**.



6. Click on the **Directories** icon.



### Export a Directory

A directory can be exported into an excel format. (Note: Federal privacy laws prohibit selling of mailing addresses and electronic addresses to third-party sources or providing them for marketing purposes without written permission of the individual.)

1. Use the directions above in the [Access a Directory](#) section of this guide.
2. Click on **Export this report in CSV format (Unicode)**.



3. In the pop-up box, choose **Click here to download**. If you do not see the pop-up box, check to make sure a pop-up blocker is not blocking access. Generally the pop-up box appears at the bottom left of your screen.



**TIP:** For quick information without exporting a directory, each header can be clicked on within the directory page to sort the information in a column. For example, click the header **Member/Non-Member - Last Name** to sort last names alphabetically.

### Identify Directory Information

Directories provide information for each member. (Note: Each header title includes the words *Member/Non-Member, Custom Field, or Member Group Info*. These parts of the header cannot be changed. However, once exported, you can change the header title within the excel document as needed.)

Information in each Directory:

- **Date Membership Expires** – Directory listings will include members that are in their grace period. Not renewed member lists are provided to your Membership and MAL Directors monthly. If you need a not renewed list, please contact your Membership or MAL Director in your region. Regional Membership and MAL Directors are listed on each [regional page](#).
- **Date Last Dues Transaction**
- **Member Type** – Active member (Member is part of a local association), Corporate Staff (IAIP Staff Member), Member-at Large
- **First Name**
- **Last Name**
- **Designations**
- **Organization** – Company
- **Email**
- **Alternate Email**
- **Home Phone**
- **Mobile Phone**
- **Physical Address**
- **Primary Group Code** – Every local association, state, and region has a group code. Codes can be identified by going to [regional pages](#).
- **Group Type: Name** – Identifies the directory list that is pulled.



Hello my fellow members.

On behalf of the Legacy

Board and Task Force, I wish to let you know we are so excited to begin another year. It is so rewarding for us, to have the opportunity to assist our members with their educational needs in the coming months. During the Convention in June, you heard us talk, over and over, about the Scholarships and Grants that we would like to award to our members. In order to assist you in participating in these awards, the information is below.

Application is on the Legacy website: [naiwlegacyfoundation.org](http://naiwlegacyfoundation.org); or the Legacy Foundation Logo on the IAIP website

Deadlines are as follows:

Scholarships: August 15th (awarded September 15th); January 15th (awarded February 15th)

Grants: October 15th (awarded November 15th); March 15th (awarded April 15th)

Norm Zeigler Scholarship: January 15th (awarded February 15th)

Take time today and determine what educational endeavors you need to take to complete a designation or just to improve your knowledge regarding the insurance industry. If you are a Local, Council, or Regional officer, director or chairman talk to your members and see what you can do to assist the members with their educational needs.

Again, we are here to help, so please if you have questions reach out to me at:

[rosalyn.horton@yahoo.com](mailto:rosalyn.horton@yahoo.com)

rosalyn "roz" horton, Chair - Legacy Foundation Board

615-767-2471

[DONATE TODAY](#)