

*SOUTH BAY ASSOCIATION OF INSURANCE PROFESSIONALS*  
*September/October Newsletter*



September/October  
2022  
NEWSLETTER

*President's Message*



Happy Fall Y'All!!!

As we head into the final few months of the year, we are looking forward to CA Council which is being held 10/7-

10/8/2022 in San Ramon, CA. Not only will we be discussing and finalizing business for the Council, but we will be enjoying the welcome party – Day of the Dead theme, a wine tasting party, Luncheon recognizing the presidents of various chapters making the trek to San Ramon and awards for various members and their part in the association.

December will give us our Christmas/Holiday Party – “Eats, Treats & Tinsel” at the Thompson home. Thank you, Keri & Marshall for opening your home to us once again. Watch for the invitation flyer which should be out the middle of November.

January 19<sup>th</sup> will be our first CE Class for the year. We will be virtual for this first class with instructor, Dawn Kyles from Servpro who has taught other courses for us. This time we will be working towards offering the course “Restoring Contaminated Building”.

February we are working towards our Membership Mixer with the location to still be determined.

We are hoping to also start having some business dinners once again and we are hoping to provide some 1 hour CE courses at the dinners.

We are still working towards filling our committee member slots, if you are interested in working on any of the committees, please let me know. Fresh ideas are needed and welcomed.

Join us as we work together on the goals for the coming year.

*Jody Nishida*  
2021-2023 President

**THE FUNCTION  
OF LEADERSHIP  
IS TO PRODUCE  
MORE LEADERS,  
NOT MORE  
FOLLOWERS.**

~ Ralph Nader ~  
purehappyliife.com

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**MEMBER NEWS:**

**HAPPY BIRTHDAY**

**SEPTEMBER BIRTHDAYS**

Carleen Armstrong 3<sup>rd</sup>  
Sarah Kelly 13<sup>th</sup>

**OCTOBER BIRTHDAYS**

Margaret S. Lamdagan 29<sup>th</sup>

**NOVEMBER BIRTHDAYS**

Keri Thompson 17<sup>th</sup>

**CONDOLENCES**

Sarah Jane Jara for the loss of her father

**CONGRATULATIONS**

Margaret & Dave Lamdagan on another year of bliss.

**MEMBER NEWS**  
(cont.)

**MEMBERSHIP  
RENEWALS**

Did you renew your membership?

**SEPTEMBER RENEWALS**

Saphyna Delgado (dual) 11<sup>th</sup>

**OCTOBER RENEWALS**

Jennifer Dienert-Peterson 10<sup>th</sup>

**NOVEMBER RENEWALS**

Here's hoping that all our IAIP family on the east coast are safe and well after weathering Hurricane Ian.

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SAVE THE DATE



*October 2022*

**1<sup>st</sup>** 2022 Walk to End Alzheimer's –  
Hermosa Beach, CA

**6<sup>th</sup>** – CA Council Meeting  
**9<sup>th</sup>** Marriott – San Ramon

*November 2022*

**tbd** SBAIP Board Meeting

*December 2022*

**13<sup>th</sup>** SBAIP Holiday Dinner

*January 2023*

**29<sup>th</sup>** CE Class - Virtual

*February 2023*

**tbd** Membership Mixer

**tbd** CE Class

*March 2023*

**tbd** CE Class

*April 2023*

**27<sup>th</sup>** – Region VII Conference

**29<sup>th</sup>** Prince Hotel Waikiki - Honolulu, HI

**For more information, watch for  
invitations to these events**

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### **Beach Cities Walk 2022**



October 1<sup>st</sup>, SBAIP once again walked this year to End Alzheimers.

Help support us by donating to our cause. Your donation helps all afflicted with this disease.

[donate to our cause by clicking here](#)



## **ALZHEIMER'S ISN'T STOPPING. NEITHER ARE WE.**

Thank you for your commitment to the fight against Alzheimer's disease. You've taken the first important step by registering for the Alzheimer's Association Walk to End Alzheimer's®. Now it's time to get started raising funds and awareness — this toolkit contains tips and resources to help you along the way. You can find even more tools and support on your Participant Center ([alz.org/walk](https://alz.org/walk)), including easy ways to recruit team members and fundraise online.

The Alzheimer's Association® believes no one should face the disease alone. Every dollar you raise helps to provide vital programs and services to those facing Alzheimer's, while continuing to advance critical global research. Together, we can end Alzheimer's disease.

We're moving forward with plans to host Walk to End Alzheimer's in person this fall. The health and safety of our participants, staff and volunteers remain our top priorities as we make decisions about event details in your community, and we'll continue to offer options to participate online and in your neighborhood. Visit the FAQ page on [alz.org/walk](https://alz.org/walk) for more information.

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## Member Orientation Incentive

IAIP has created an exciting, new, fast-paced orientation video. It is a great refresher/learning opportunity for all IAIP members - not just new members! Not everyone is aware of all of the programs and member benefits that IAIP offers. This short video is a perfect way to learn about what's new with IAIP.

**To encourage existing members to watch the new video, we have created a fun incentive contest.** All members who watch the video and pass the quiz will be automatically entered into a bi-annual drawing for their choice of either a \$25 Visa Gift Card or a \$50 credit towards any IAIP educational material. The drawing will be held twice a year – on August 1 and February 1. You can only win once.

Encourage your members to take advantage of this great opportunity to be rewarded for staying current with IAIP!

## Region VII Poolside Chat with our RVP-October 20, 2022

Our Regional VP will be holding a “Poolside Chat” via zoom on October 20, 2022 to discuss various happenings in the region. If you wish to join the zoom meeting, please contact Jody at [jodynpal@gmail.com](mailto:jodynpal@gmail.com) and she will forward the link for the meeting.

## Safety Tip for the month





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## **CAREER ADVISORY Service**

**By Margaret S. Lamdagan, CPCU, CPIW – Career Advisory Chair**

Career Advisory is a discreet service available to IAIP members to help with career development and employment. Employers may offer employment on various terms such as full-time work from home, hybrid – work from home 1 to 3 days a week with the balance at the office, or full-time inside the office. Some positions require travel. Other positions may be fully flexible, so long as you achieve the employer's goals, allowing the employee to work varying days and hours.

Are you a member of IAIP interested in making career or employment changes? Do you want to explore employment opportunities in the insurance industry and related services? Then, request the Career Advisory Chair to add you to a **confidential list** that is known only to the Chair. This private listing will expire July 1, 2023, or earlier if you request to be removed from the list before then. Be sure to provide an email address that is not connected to your employer to maintain confidentiality.

Are you an employer seeking to fill openings at your business due to expansion, employees retiring or moving? What better place to start your search than by networking within IAIP? Members of IAIP are likely to be better educated, well informed, trained in making presentations and skilled in using current tools and technology. If an employer has job postings, contact the Career Advisory Chair. Don't forget to notify the Chair once the positions have been filled.

Job openings will **not be announced** at SBAIP meeting nor published in the SBAIP newsletter nor advertised via e-mail messages.

SBAIP is not responsible for the qualifications, education, licensing, or other eligibility criteria for job applicants, nor for screening the requirements of potential employers.

Contact for Career Advisory:

[mslmemberofnaiw@gmail.com](mailto:mslmemberofnaiw@gmail.com) Email subject line: Career Advisory.

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**RICARDO LARA**  
CALIFORNIA INSURANCE COMMISSIONER

## NOTICE

**TO:** Education Providers and Other Interested Parties  
**FROM:** Holly Kinney, Chief, Curriculum and Officer Review Bureau  
**DATE:** August 24, 2022  
**RE:** Revised Eight-Hour Long-Term Care Course Outline and Attachments

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The California Department of Insurance (CDI) recently approved the Commissioner- appointed Curriculum Board's proposed revisions to the Eight-Hour Long-Term Care (LTC) Course Outline (Course Outline) and its attachments. The revised Course Outline and attachments are available on CDI's [Resident – Provider Continuing Education Courses, Outlines and Materials](#) webpage.

### Instructions for Submitting an Eight-Hour LTC Course Renewal

Due to the substantial revisions made to the Course Outline and its attachments, education providers must submit their updated course curriculum at the time they renew these courses.

The following are the required items to be submitted to CDI to renew this course to ensure the course renewal can be processed in a timely manner:

- 1) A completed provider course renewal letter, LIC 446-38, which is provided online to education providers
- 2) Updated continuing education course materials
- 3) A document that cross-references the updated training material to the revised Course Outline.
- 4) A renewal filing fee of \$15 for each course

### Instructions for Submitting a New Eight-Hour LTC Course

Effective immediately, continuing education providers submitting a new Eight-Hour LTC Course must submit the following items to CDI to ensure a timely review of the new course:

- 1) A completed Prelicensing/Continuing Education Program Course Approval Application, [LIC 446-3](#)
- 2) Eight-Hour LTC Course materials
- 3) A document that cross-references your training material to the revised Course Outline
- 4) A filing fee of \$41

For any questions regarding this Notice or to receive a copy of the edited versions of the revised course outline and its attachments, please email CDI's Curriculum Review Section at [CDI.Education@insurance.ca.gov](mailto:CDI.Education@insurance.ca.gov) or contact the Curriculum Review Section's Education Unit at (916) 492-3064.

CALIFORNIA DEPARTMENT OF INSURANCE  
PROTECT • PREVENT • PRESERVE  
Licensing Services Division – Curriculum and Officer Review Bureau  
320 Capitol Mall Sacramento,  
California 95814  
(916) 492-306

# *SOUTH BAY ASSOCIATION OF INSURANCE PROFESSIONALS*

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### **BATTLING VIRTUAL MEETING FATIGUE**

#### **Tips for More Effective and Engaged Online Meetings**

By Christopher W. Cook

With hybrid work schedules becoming permanent in the workplace, there is no sign that virtual meetings will be going away.

At last year's Applied Net meeting, a session – How Smart Leaders Combat Virtual Meeting Fatigue and Create Engagement –provided tips on the topic.

"In a virtual meeting, the only way to show we're paying attention is to look at the camera," said Joseph McFadden, instructional designer with Alliant Insurance Services. "Having to engage in a constant gaze makes us uncomfortable, and frankly, it wears you out and makes you tired." Add to this the performance anxiety involving virtual backgrounds, available equipment and having the best lighting. Here are a few things leadership can do to have successful online meetings.

#### **Preparing for the battle**

According to McFadden, the key to battling virtual fatigue and increasing engagement is to be as prepared as possible prior to the start of the meeting.

"Make sure to keep meetings as short as possible. Don't stay in the battle after you've achieved your goals. Be brief, bright and be gone," said Jayme Moreno, Alliant Insurance Services training specialist.

While even the best meetings can get off topic, always take notes so the best ideas can be followed up on.

Have as few meetings as possible. "Each meeting should be one of three things: generate solutions, evaluate options, or update the team," McFadden said. Keep time zones in mind if you have remote workers across the country.

Finally, be ready. Start on time, no matter what. "If someone's late or having technical issues, let them drop off and get themselves together, and then rejoin," Moreno added.

#### **Taking cover**

While combating virtual fatigue, taking cover refers to sparing your team members from a bombardment of too much information at one time. "Limit how much info you cover in any one meeting; that gives you less to prepare for and gives participants less to focus on," Moreno added. "Use different ways to get your point across. Sharing documents and presentations" and "use tools like chats, whiteboards or even pictures – all of which make meetings more engaging and fun."

Another important thing to remember for longer meetings is to include breaks. Leaders should not go longer than 30 minutes without at least one three-to-five-minute content break, and no longer than 60 minutes without at least an eight-to-ten-minute bio-break.

"Be creative and generous with your breaks," Moreno said. "The bio breaks are best when leaders encourage everyone to stand up, step away, stretch, refill beverages and walk around a bit."

Use timers and music so participants know when to return. For the shorter content breaks, provide an opportunity for those attending to participate in icebreaker activities. Have them share information about themselves like:

- Favorite foods or restaurant
- Names of significant others, kids and pets
- Hobbies or interesting experiences
- What they are thankful for

#### **Incoming direct fire**

Another thing that can make virtual meetings difficult is incoming direct fire (IDF), which can come in the form of interruptions, distractions and frustrations.

One form of interruption, according to McFadden, is the concept of multi-tasking, which he referred to as a myth. "Staying focused on one thing at a time is more engaging and productive," added Moreno. "As a leader, you should limit or eliminate things that could interrupt you during the meeting and encourage your team to do the same."

She recommends for those team members working from home to communicate meeting schedules with others who may be present in the household. Make sure your visible workplace is ready to be seen and close tabs on your computer screen prior to the start of the meeting to minimize distractions and give yourself plenty of time to log in.

If distractions and interruptions proceed, it can lead to frustration. McFadden said: "Frustration is draining, physically and mentally, and if your team or your participants anticipate frustration during your meeting, engagement is even more difficult to generate."

#### **Changing tactics**

An alternative to combating virtual meeting fatigue is not to have a meeting in the first place. Instead of having a meeting, try some of the following approaches:

- **Email.** "Sometimes a good email is worth 1,000 meetings," McFadden said.
- **Text.** "Texting is a fantastic way for a quick exchange and sharing that can help avoid meetings in general," Moreno said.
- **Chat.** "It is a great way to collaborate and stay connected," Moreno said.
- **Phone.** "Sometimes, the old school is the best school, and just to hear a voice and have a one-to-one conversation is the best way to connect and share," McFadden said.
- **Snail mail.** "Who doesn't like to receive cards or letters? That is an effective way to deliver a message to almost anyone," Moreno said.
- **Home delivery.** "It's not a substitute for meetings, but you can use home delivery services as an add-on or combined with virtual events to make them more fun and memorable," McFadden said. These can be used for things like lunches, parties, showers, new hires.

In the big picture, "Taking these steps can help you and your team feel less exhausted and blue about the thought of another virtual meeting. Even using a few of these ideas can create better energy, engagement and effectiveness for you and your team," Moreno concluded.

This article is condensed from a more detailed article written by Christopher W. Cook that appeared in "Rough Notes" June 2022.



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**California FAIR Plan Association**

725 S. Figueroa Street, Suite 3900, Los Angeles, CA 90017  
Website: [www.cfpnet.com](http://www.cfpnet.com)

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TO: Registered FAIR Plan Brokers  
FROM: California FAIR Plan  
DATE: Friday, July 29, 2022  
SUBJECT: **CREDIT/DEBIT CARD PAYMENTS**

The FAIR Plan has the following secure and convenient payment options available for customers, and we want to provide you with an update to make sure you're aware of any applicable fees.

Currently, insureds have multiple payment options available.

1. The FAIR Plan accepts **electronic payments from checking or savings accounts, also known as Automated Clearing House (ACH) payments**, online through One Inc, the FAIR Plan's third-party payment solutions provider. There are no processing fees with this option. ACH payments can be made online at [www.cfpnet.com/online-payment](http://www.cfpnet.com/online-payment).
2. We also accept payments by **credit or debit card payment online** through One Inc. One Inc includes a 3.5% processing fee, effective August 1, 2022, for this payment option. Similar to ACH payments, credit/debit payments can be made online at [www.cfpnet.com/online-payment](http://www.cfpnet.com/online-payment) (same page as ACH payments). One Inc charges this fee to defray the cost of processing this payment option, a standard practice in the private sector and used by most public agencies. The FAIR Plan does not receive any of this fee.
3. We also accept payments by **check via mail** to the FAIR Plan. There are no processing fees with this option. Checks can be sent directly to our mailing address, listed on our [website](#), at P.O. Box 76924, Los Angeles, CA 90076.

These same payment options are available for brokers making payments on behalf of their customers.

**Please share this information with everyone in your office who handles FAIR Plan business.**

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This message was sent to broker with Agency No.: 0113219 and email address: [jody@djdins.com](mailto:jody@djdins.com)

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**AWARDS**

It's that time of year! It's Awards Submission time! International Awards Submissions are due to the RVP by November 15th (11/15/2022) no later than 11:59

pm at submitting members time zone. All members that meet the eligibility requirements can submit for an award and be recognized for your hard work and IAIP membership. Here are the awards you can apply for along with a brief description to explain to our newest members and a great reminder to our seasoned members:

**Claims Professional of the Year** - This award was originated during the 1973-1974 fiscal year. The purpose of the award is to recognize a claims professional who has demonstrated superior knowledge of the claims field, experienced professional advancement through educational pursuits, demonstrated leadership in the field, and is an active participant in IAIP activities.

**Client Service Professional of the Year** - This award was first presented in 2014. The purpose of the award is to recognize members whose primary responsibility is in a service capacity with internal and/or external customers. It is particularly intended to include IT professionals, Human Resources, Accounting, Actuarial, Industry Support (i.e. restoration, repair, etc.), and Customer Service Representatives in the insurance and all supporting industries.

**Insurance Professional of the Year** - This award was first presented in 1991. The purpose of the award is to recognize an individual who in pursuing a career has contributed to the insurance industry through education, creation of industry alliances, and/or legislative activity.

**Risk Management Professional of the Year** - This award was first presented in 2008. The purpose of the award is to recognize a risk management professional who has demonstrated superior knowledge of the risk management field, experienced professional advancement through educational pursuits, demonstrated leadership in the field, and is an active participant in IAIP activities.

**Rookie of the Year** - This award was initiated during the 1977-1978 fiscal year. The purpose of the award is to recognize the accomplishments of a new member who has made significant contributions to IAIP within the first 24-months of joining the association.

**Professional Underwriter of the Year** - This award was first presented in 2008. The purpose of the award is to recognize a professional underwriter who has demonstrated superior knowledge of the underwriting field, experienced professional advancement through educational pursuits, demonstrated leadership in the field, and is an active participant in IAIP activities.

**Young New Professional of the Year** - This award originated during the 2015-2016 fiscal year. The purpose of the award is to recognize the accomplishments of a member of the Young New Professionals group who has made significant contributions to IAIP after the first 24-months of joining the association. It recognizes participation in association affairs, completion of selected insurance courses and involvement in governmental activities.

Regina Lemanowicz, CLP  
Awards Chair

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## **UNDERSTANDING IAIP AWARD APPLICATIONS**

**By Margaret S. Lamdagan, CPCU, CPIW**

IAIP has made important changes to the IAIP award applications and scoring sheets.

This is a summary of key changes.

### **Important Change for the Job-Specific of the Year Awards**

Eligibility Requirements:

- Current primary job function must be in the specific award applied for (e.g., Risk Management, Claims, Underwriter, Customer Service). It must not be a minor job function.
- Once a member receives the regional (specific) of the Year award, they may not apply for the same regional award for 3 calendar years.
- Previous international winners are not eligible to compete for the same award at any level of the association.

Scoring Sheets:

IAIP participation at different levels are given different point values, local, council, regional and international. The number of points awarded for attendance also varies by level within IAIP.

Suggestions:

- Don't get discouraged. Persevere. Your year will come.
- Thank the award sponsors.
- Use the member engagement record found in the IAIP membership tool kit to keep track of IAIP activities, participation, and courses. Keep it current throughout each year.

- Print out the score sheets and review them as you prepare your award application.
- Allow ample time to assemble your submission. Keep your application well organized, page numbered, with clearly labeled attachments. Send your completed application at least two weeks before the deadline.

Go to the IAIP website to pull up the complete recording of the September 28, 2022, Town Hall meeting. This is where significant changes or clarifications were made regarding IAIP awards and scoring.

Thank you to Jonel Leake, Region I Vice President, Rachel Shubert, Region III Vice President and Vickie Harmon, International Vice President for their presentation on 9/28/2022. It was well worth my time.

### **Note to Members:**

Remember that SBAIP has an Awards Committee to which you can submit your application for an award and we will assist in checking for syntax. There will be a minimum 10 day waiting period for the review of your application prior to being able to submit to the CA Council, Region VII or International Awards Committee should you chose to use this support.