



International Association of  
Administrative Professionals®  
Pennsylvania Division

www.iaap-pennsylvania.org

# Your Division Connection

VOLUME 1 ISSUE 4

MAY 2009

## OFFICERS

*President:*  
Jean Bohinski CPS/CAP

*President Elect:*  
Diana Comber

*Vice President:*  
Catherine Hoke CPS/CAP

*Treasurer:*  
Carol Lundgren CPS/CAP

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## A Message from the President...

By the time you read this newsletter, the spring flowers will be in full bloom, we will experience more hours of sunlight, and in general, have a feeling of well being. That is how I also feel about the close of the 2008-2009 IAAP year. We have all been exposed to, and some have chosen to explore, the **Pathways to Excellence**. It certainly has been a year of **Excellence in Action**.

The Pennsylvania Division Annual Meeting is right around the corner – my sincere hope is that you have the opportunity to participate in this excellent learning opportunity. We will conduct the business of the Division, but will also have outstanding workshops arranged by the Southeast Council members. You won't want to miss our special International Board representative, International Secretary Janine Riemersma CPS/CAP. You are in for the "Royal Treatment" May 15-17, 2009, at the Park Ridge Hotel in King of Prussia, PA.

I would like to take this opportunity to thank my fellow Board members; Division President-Elect Diana Comber, Division Vice President Catherine Hoke CPS/CAP, and Division Treasurer Carol Lundgren CPS/CAP. Their hard work, efforts, and guidance have made us truly a successful team – "Thank you!" Also, to those who have served on a Division Committee during 2008-2009, "Thank you!" Your willingness to take on a leadership role has helped to make this a year of **Excellence in Action**. Lastly, to all of the members of the Pennsylvania Division, "Thank you!"

It has been an honor for me to serve on the Pennsylvania Division Board the past five years. I have learned so much from my predecessors; and I hope that your future Division leaders will say the same of me. Every member of the Pennsylvania Division should stand tall and hold their head up high - the Pennsylvania Division exemplifies **Excellence in Action!**

*Jean*

Jean Bohinski CPS/CAP  
Pennsylvania Division President

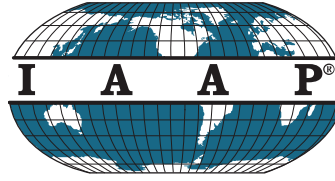




*Proxy:*

*1) A person authorized to act for another; a substitute.*

*2) The written authorization to act on behalf of another.*



International Association of  
Administrative Professionals®  
*Pennsylvania Division*

## Is Your Chapter's Voice Being Heard?

The name has changed, but the great networking and education opportunities remain the same! The City of Minneapolis, Minnesota, is our host for the 2009 IAAP® International Education Forum and Annual Meeting (EFAM)! This year's event is being held from July 26<sup>th</sup> – 29<sup>th</sup> and will offer more education than ever before!

Taking in the sightseeing and shopping of Minneapolis will be on the agendas of many Pennsylvania Division members. However, **one of the most important reasons to attend this convention is to vote on various items during the business meeting from bylaw amendments to the International Board of Directors.**

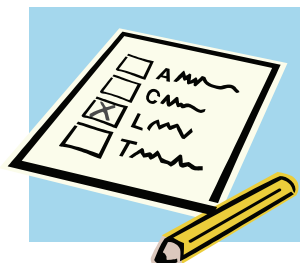
Your chapter's vote at the International Convention is very important. If you are not sending a Delegate to the convention, please be sure to complete and submit your chapter proxy to the IAAP International Headquarters. The blank proxy form will be sent to all chapter presidents under separate cover from Headquarters.

The Pennsylvania Division Board would like to have the voting rights of **ALL** Pennsylvania Division chapters utilized at the International Convention, either by Delegate or a chapter's proxy.

If you have any questions regarding chapter proxies for International Convention, please contact your Division Board Mentor or Incoming PA Division President Diana Comber.

The PA Division Board hopes that you will join us in Minneapolis to celebrate the accomplishments of our organization and the 2008-2009 **Excellence in Action** year. Look for information via e-mail regarding our annual Division Dinner and Photo soon!

Diana Comber  
PA Division President-Elect



## Incoming Division President's Conference (IDPC)

On April 16, 2009, I packed my suitcase and headed for the airport to attend IDPC in Kansas City, MO. After a nice, relaxing flight on US Airways, I took a shuttle to the Kansas City Hilton, checked in and met my roommate from Mississippi. That evening I met other incoming Division Presidents and had dinner with some friends at a local casino in Kansas.

The Friday Agenda was packed. We began at 7:15 in the morning with breakfast and introductions. It was such a pleasure to meet current members of our International Board, our Headquarters managers and staff that make things happen for us.

After introductions, we began a day of team building exercises, overviews on the IAAP organization from the particulars of IAAP, fiduciary and legal responsibility, financial responsibilities, and strategic planning. We broke for lunch and were transported to IAAP Headquarters which is nearby, had a nice lunch sponsored by Boston Market, and toured the facility and met other members of the HQ staff there. What fun!

After lunch, we returned to the hotel and were back at work. We reviewed making IAAP a remarkable association by 2010 and were given an insight of the new web community that is currently being launched by Aaron Ensminger. The new web community is a *fantastic* tool! Everything from document sharing to the forums...the PA Division website will be migrating to the new web community after the Division Annual Meeting so all members of the PAD will be able to immerse themselves into this great tool!

After dinner and another team building exercise, the day was over (at 9:00 PM) and after some networking with other Incoming Division Presidents, it was time to rest!

Day 2 was just as jam packed as Day 1 – again beginning at 7:15 in the morning! On this day we went through some more team building and moved on to learning about how to be the team player that everyone wants on their team. We also learned about conflict management and conflict resolution.

After lunch sponsored by the RTF, we had a workshop on ethics and were treated to a great presentation by Avery Dennison. When this concluded, we had to “wrap up” the two days...how to walk the talk. Overwhelming? Not a chance! Incoming President Susan Shamali CPS/CAP has a great vision and it will be an honor and privilege to be a part of her team this year!

The evening was spent in a round table group discussion on the upcoming bylaws amendments that will be presented at this year's EFAM and any questions that we may have had about the weekend. Incoming President Shamali stressed teamwork, teamwork, teamwork – all DPs are part of her team. I must admit that I felt more confident after this weekend that I anticipated!

After we departed from our last networking session in the lounge that evening, I packed my suitcase, shipped my goodies home, and caught my 6AM flight from KC back to Philadelphia...ready, willing and able to assume the office of President of the Pennsylvania Division!

My thanks to NED Judie Yannarelli CPS/CAP for her helpful tips to prepare for the conference and Division President Jean Bohinski CPS/CAP for her insight into the IDPC to help me get the most out of the weekend. It made the experience even more worthwhile!

Diana Comber  
PA Division President-Elect



*“Teamwork is the ability to work together toward a common vision. The ability to direct individual accomplishment toward organizational objectives. It is the fuel that allows common people to attain uncommon results.*

*Andrew Carnegie*



## CERTIFICATION CORNER

### Certification News and Reminders

The International Board reviewed the current policy of the Certification Department regarding late applications. The International Board approved a \$50 late fee for accepting exam applications between February 16 and February 28 and August 16 and August 31 for the May and November exam, respectively. No applications will be accepted after those dates.

The International Board reviewed the current policy of the Certification Department regarding exam withdrawals and transfer to future exams. The International Board approved changing withdrawal deadlines to April 1 and October 1 for receiving a refund of one-half of the exam fees paid. The International Board also approved a one-time transfer (with a \$50 fee) for exam transfers by April 1 or October 1. Transfers are permitted in limited circumstances and individuals should review the exam application for details.

Recertification deadlines were also reviewed by the International Board. Individuals must recertify within five years of their initial certification or five years after the month of the last recertification. The International Board approved a 120-day grace period for individuals to submit their recertification paperwork, for those who recertify after January 1, 2009. The International Board also approved a \$100 late fee for those individuals who submit their paperwork after the five-year deadline. Recertification points will still need to be within the original timeline (five years) and recertification will be backdated to that time.

**For those of you taking the May exams, good luck!**

### Recertification

Do you want to provide chapter programs that are approved for recertification points? All you need to do is fill out the application and submit it via e-mail with a copy of the speaker's bio and an outline of their presentation. Within a few days to 2 weeks, you will receive your approval. Samples are included in this update.

To receive one point, the presentation must be 1 hour long. You can get half points if you go to 1.5 hours, etc.

### 2009 Certification Conference

Mark your calendars now for the annual Certification Conference to be held in Portland, OR, October 18-21, 2009. Complete Conference details will be available in the spring of 2009 and Conference registration will open June 1 for those who hold an active CPS or CAP rating. Watch the main IAAP web site ([www.iaap-hq.org](http://www.iaap-hq.org)) under Events for details.

Feel free to contact your Division Certification Committee with any questions. You may also contact IAAP Headquarters at 816.891.6600 x 2225, 2227, 2248, or e-mail [certification@iaap-hq.org](mailto:certification@iaap-hq.org).

Dawn Hall CAP, Chair  
[dmariehall@verizon.net](mailto:dmariehall@verizon.net)

Sheran Springer CPS  
[sspringer@eveyblack.com](mailto:sspringer@eveyblack.com)

## Recertification Program Application



Harrisburg Chapter 216240  
 IAAP Unit Name IAAP Unit ID Number

November 17, 2008 7:00 p.m. – 8:00 p.m. Chapter Event  
 Program Date(s) Starting/Ending Time of Program District/Division/Chapter Event  
(Time of education program only; do not include time for chapter meeting, meals/breaks or business.) (indicate one)

Program Site Harrisburg, PA Name of Speaker(s) Russel Urffer, Jr., CLU, ChFC  
 (city & state)

Title of Program (as promoted) Strategic Planning Workshop: Often Overlooked Tools for Retirement

Program Description See attached outline

Outline of Program, topics to be covered and time frame  
 See attached outline

Short bio on speaker(s)  
 See attached bio

Juanita Mort CAP  
 IAAP Unit President

Dawn Hall CAP  
 IAAP Unit Program Chairperson

Phone: Work 717-232-2191  
 Fax 717-233-8221  
 Home 717-583-0475  
 E-Mail jmort@brennerfamily.com

Phone: Work 717-796-3116 x 12  
 Fax 717-796-3625  
 Home 717-671-4935  
 E-Mail dmariehall@verizon.net

Correspondence and Certificate to:

Name Dawn Hall CAP E-mail Address dmariehall@verizon.net

E-mail Address \_\_\_\_\_

Send completed Recertification Program Application to [certification@iaap-hq.org](mailto:certification@iaap-hq.org) at least two weeks prior to the program date.

Headquarters Use Only			
Date Recd _____	Date Processed _____	Approved or Denied _____	
# of Points _____	Education or Elective _____	Program # _____	Initials _____

**SAMPLE****OFTEN OVERLOOKED TOOLS FOR RETIREMENT**  
Presentation Outline

## General Review of the Types of Life Insurance

- Term Life – a death benefit for a certain period of time only. Can be converted to permanent coverage before term period ends.
- Whole Life – permanent insurance usually to age 100 that offers some build up of cash.
- Universal Life – permanent insurance that can provide a death benefit to as old as age 120. This policy performs based on current interest rates and also builds cash.

## Why you buy life insurance?

- To cover your funeral costs
- To provide income to a spouse or children if you die prematurely
- To provide an inheritance to a spouse or children at an older age
- To cover debt –personal or business

## How to use life insurance as a retirement vehicle (including tax issues).

- Take loans from the cash value to provide income
- Take withdrawals from the cash value to provide income
- Transfer the cash value from the life insurance to an annuity that provides a monthly income

## General Review of the Types of Annuities

- Fixed Annuities – set interest rate for a period of years
- Indexed Annuities – interest earned is based on different strategies linked to mutual funds indices
- Immediate Annuities – an annuity that turns a lump sum into a monthly income for a specific period of time

## Why you buy annuities?

- As an investment for funds you do not need as income now
- As an IRA investment
- To provide a monthly income so that you do not spend all of the money at one time.

## OFTEN OVERLOOKED TOOLS FOR RETIREMENT - Continued

How to use it as a retirement vehicle (including tax issues non-qualified vs. qualified)

- When you retire, turn the annuity into a stream of income
- Invest now to defer taxes on the funds until an older age and hopefully lower tax bracket

Questions & Answers

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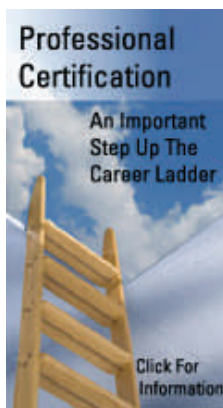
## SAMPLE BIO

### BIO FOR RUSSEL URFFER, JR, CLU ChFC

Russ is the President of MidAtlantic Insurance Consultants, a life brokerage firm in Etters. He has been in the financial services industry as an agent, manager, insurance carrier executive and owner of his own brokerage firm for the last 36 years. Russ has his Bachelor of Science in Agronomy from Delaware Valley College and grew up in Southeast Pennsylvania. He is a Chartered Life Underwriter and Chartered Financial Consultant. He also is a registered principal with ProEquities, Inc. – a broker/dealer offering securities.

Russ counsels life insurance agents and financial service professionals on life and annuity products, investments, sales concepts and tax issues. He has served on Producer Advisory Councils to numerous insurance companies. He is currently servicing as President of the National Brokerage Consortium, a national marketing organization consisting of 35 members across the U.S. and representing 15 large insurance carriers.

Russ is well respected by his peers and has been a great supporter of IAAP and the Harrisburg Chapter.



*Try to discover  
The road to success  
And you'll seek but never find,  
But blaze your own path  
And the road to success  
Will trail right behind.*

*~Robert Brault, robertbrault.com*

## *Standards of Integrity*

### *International Association of Administrative Professionals (IAAP)*

**Preamble.** IAAP members, chapters, divisions, affiliates, International Board and Headquarters Staff will exhibit the highest standards of integrity through core values; ethical representation; and, transparent demonstration of financial stewardship.

Members around the world will focus their skills, energy and commitment to excellence in support of IAAP by conducting business responsibly and in a manner that reflects favorably to the Association. These Standards will also encompass full support for the Confidentiality and Conflict of Interest Statement and the IAAP Code of Conduct, with keen awareness of compliance with the law and always working from a position of trust.

#### **IAAP Core Values\*:**

**Integrity - We demonstrate this cornerstone of our profession through honesty, accountability and high ethical standards.** We will conduct our professional activities in a manner that will reflect well upon the profession

**Respect - We create respect within our profession and association through listening, understanding and acknowledging member feedback.** We will encourage the diversity of views, with compassion and respect for the rights of others to hold values, attitudes, and opinions that may differ from our own.

**Adaptability - We ensure the success of our association by embracing positive change and by nurturing diversity, creativity and visionary thinking.** We will encourage others to operate outside of their comfort zones, facing ambiguity with a spirit of innovation and forward thinking.

**Communication - We cultivate and maintain excellence by remaining approachable at all levels, communicating openly and building strong relationships.** It is readily accepted that information given and assessed must be based on truth, fairness and accountability. We will obey the law, perform in good faith, and seek fair outcomes.

**Commitment - We are steadfast in our goals to develop learning opportunities for career-minded administrative professionals and to strengthen efficiency and effectiveness.** IAAP has a responsibility to the people it serves and shall not practice, condone, facilitate or collaborate in any form of discrimination on the basis of race, color, sex, sexual orientation, age, religion, language, disability or socioeconomic status.

\*The IAAP Core Values noted in bold type are those approved by the International Board of Directors on November 1, 2008.

## ***Standards of Integrity*** *(Continued)*

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### **Ethical Business Conduct for IAAP Members**

#### **Trust**

IAAP members shall:

- Maintain truthfulness and honesty, not compromising either of these for advancement, honor or personal gain.
- Encourage open communication, creativity and dedication.
- Live and work by the highest ideals by establishing, practicing and promoting professional standards.
- Share knowledge.
- Be loyal to your employer and to the ideals of confidentiality, respecting and protecting privileged information.
- Stimulate and maintain an environment of transparency.

#### **Behavior**

IAAP members shall:

- Establish procedures that promote ethical behavior and hold employees, members and others accountable for their conduct.
- Recognize our behaviors and how we affect those around us.
- Respect each other, our leaders and our members through our actions and the quality of our work.
- Zealously guard against conflict of interest or its appearance.
- Ensure that others receive credit for their work and contributions.
- Take responsibility for our own errors.
- Exemplify loyalty and conscientiousness.
- Maintain dignity and poise under all circumstances.

**Ethical Business Conduct of Those Who Represent and Govern IAAP.** The International Board of Directors, Executive Director and Headquarters Staff shall act in the best interest of the association and not in their own interest or in that of another organization; and act as reasonable and prudent. They shall maintain the confidentiality of information entrusted to them from whatever source, except when disclosure is authorized or legally mandated. They shall not use confidential information for personal benefit or to benefit persons or entities outside the association. Any known or potential conflicts of interest shall be openly communicated before considering any business transactions on behalf of IAAP.

03.08.09

**2008-2009 Annual Report**  
**IAAP® Pennsylvania Division President**  
**Jean Bohinski CPS/CAP**

May 2008	Attended the Pennsylvania Division Annual Meeting in Wilkes-Barre, PA Installed as President
June 2008	Attended Summer Board Meeting in Harrisburg, PA
July 2008	Served as delegate at the International Convention in New Orleans, LA Sent an introductory communication to all Division Presidents
August 2008	Sent letters of introduction to my mentor Chapter Presidents and Committee Chairs Updated the Officers' Guidelines Prepared and submitted President's message for the September Division newsletter Prepared a report on the International Convention and Education Forum for the September Division newsletter
September 2008	Conducted a <i>Pathways to Excellence</i> webinar for Chapter Presidents Prepared and conducted <i>IAAP 1010 – An Introduction to IAAP</i> for official visit to the Wyoming Valley Chapter Participated in monthly Northeast District conference call
October 2008	Presented the <i>Back to Basics</i> workshop at the Northeast Council meeting, hosted by the Lehigh Valley Chapter Conducted a <i>Pathways to Excellence</i> webinar for Chapter Presidents Participated in monthly Northeast District Conference Call Conducted the Pennsylvania Division Board conference call with Chapter Presidents Prepared and submitted President's message for the November Division newsletter
December 2008	Conducted a <i>Strategic/Business Planning</i> webinar for Chapter Presidents Conducted the Pennsylvania Division Board conference call with Chapter Presidents
January 2009	Attended Winter Board Meeting at the Park Ridge Hotel, King of Prussia, PA and met with planning committee of 2009 Division Meeting Participated in monthly Northeast District Conference Call
February 2009	Participated on the Northeast District monthly conference call Prepared and submitted President's message for the March Division newsletter
March 2009	Conducted the Pennsylvania Division Board conference call with Chapter Presidents Presented <i>Dare to Lead and the Seven Deadly Sins of Leadership</i> for official visits to the Endless Mountains, Lehigh Valley, and Harrisburg Chapters. Participated on the Northeast District monthly conference call
April 2009	Prepared and submitted President's message for the May Division newsletter Participated in monthly Northeast District conference call Conducted a <i>Succession Planning</i> webinar for all Division members on three different dates
May 2009	Will conduct a <i>"Say" it with Pictures</i> webinar for all Division members Will attend the 2009 Division Annual Meeting in King of Prussia, PA Will be participating in monthly Northeast District conference call

I was the board mentor for the Bylaws and Standing Rules, Certification, Newsletter, and Student Chapter Committees. I also kept in contact with my mentor chapters throughout the year, distributing Division and International communications. I will attend the International Convention in Minneapolis, MN in July.

I enjoyed creating *Excellence in Action* along the *Pathways to Excellence* while serving on the Pennsylvania Division Board.

**2008-2009 Annual Report**  
**IAAP® Pennsylvania Division President-Elect**  
**Diana Comber**

May 2008	Attended Pennsylvania Division Annual Meeting in Wilkes-Barre, PA Installed as President-Elect
June 2008	Installed 2008 – 2009 officers of Montgomery County, Cephalon, and Liberty Bell Chapters Sent letters of congratulations and welcome to all mentor Chapter Presidents and Committee Chairs.
July 2008	Attended Division Summer Board Meeting in Harrisburg, PA Planned Division Dinner in New Orleans, LA Attended International Convention as Division Alternate in New Orleans, LA. Installed 2008-2009 officers of the Wyeth Collegeville Chapter. Began work on merge of Wyeth Corp One and Wyeth Collegeville Chapters.
August 2008	Prepared article for September Division newsletter. Worked with members of the Keystone Chapter on chapter concerns and goal setting.
September 2008	Presented “The Benefits of Membership in a Professional Organization” to Delaware County Community College and discussed the possibility of a student chapter on site. Shared communications and information with all mentor chapter presidents.
October 2008	Merged Wyeth Corp One and Wyeth Collegeville Chapters into the Wyeth Chapter. Participated in Division Board conference call with chapter presidents. Shared communications and information with all mentor chapter presidents.
November 2008	Hosted Southeast Council Meeting in Plymouth Meeting, PA – Presented “Back to Basics, Leadership 101, and Succession Planning” Sent communications to all Delaware County and Chester County members regarding new chapters in these areas. Shared communications and information with all mentor chapter presidents. Held one-on-one discussions with mentor chapter presidents regarding a check up on their respective chapters.
December 2008	Follow up on communications with Delaware and Chester County members. Participated in Division Board conference call with chapter presidents. Shared communication and information with all mentor chapter presidents.
January 2009	Attended Division Winter Board Meeting in King of Prussia, PA Shared communication and information with all mentor chapter presidents.
February 2009	Assisted in the draft of bylaws for Cephalon Chapter. Work with Bucks County Chapter on updating of Chapter Bylaws and Standing Rules. Participated in 2009 Division Annual Meeting planning meeting. Participated in Northeast District conference call. Shared communications and information with all mentor chapter presidents.
March 2009	Presented “Perception ABC’s” to the Wyeth Chapter Participated in Northeast District Conference Call Shared communications and information with all mentor chapter presidents.
April 2009	Worked with Wyeth Chapter on leadership change. Mentored Keystone Chapter on leadership and succession planning. Attended the Incoming Division Presidents’ Conference (IDPC) in Kansas City, MO Shared communications and information with all mentor chapter presidents.
May 2009	Attend Pennsylvania Division Annual Meeting in King of Prussia, PA
June 2009	Install 2009 – 2010 Liberty Bell Chapter officers.

I have served as the Board mentor for the New Chapter Builder, Website, and 2009 Division Meeting Planning Committees. It has been my honor to serve as the President-Elect of the Pennsylvania Division. I look forward to the upcoming year and serving as your Division President.

Respectfully submitted,



Diana Comber  
PA Division President-Elect

**2008-2009 Annual Report  
Pennsylvania Division Vice President  
Catherine Hoke CPS/CAP**

- May 2008**      Attended the Pennsylvania Division Annual Meeting in Wilkes-Barre, PA  
Installed as Vice President
- June 2008**      Official Visit to Toll Gate Chapter, Installed new officers and one new member  
Installed Harrisburg Chapter Officers  
Attended Summer Board Meeting, Homewood Suites, Mechanicsburg, PA
- July 2008**      Attended International Convention and Education Forum, New Orleans, LA
- August 2008**      Sent letters of introduction to Mentor Chapter Presidents  
Sent letters of welcome to Mentor Committee Chairs  
Distributed Division Directory to Chapter Presidents, Student Chapter Advisors, and PA Division Members-at-Large
- September 2008**      Conducted a leadership workshop to the Southcentral Council members, hosted by Toll Gate Chapter
- October 2008**      Submitted article on "Commitment" for Division Newsletter  
Communicated availability of November issue of *Your Division Connections* on Division Web site to Chapter Presidents  
Participated on Pennsylvania Division Board conference call with Chapter Presidents  
Attended Webinar presented by Jean Bohinski CPS/CAP on Pathways to Excellence  
Published updated Division Directory to Division Web site and notified Chapter Presidents
- November 2008**      Communicated to Chapter Presidents that 2008 Annual Meeting Minutes were available on Division Web site
- January 2009**      Presented *Building Trust* for official visit to the Harrisburg Chapter — awarded 1 Recertification Point  
Submitted Notice of Annual Meeting to President-Elect Comber for inclusion in the March newsletter.  
Assisted Susquehanna Valley Chapter with preparing their Bylaws for submission to the Division Bylaws Committee.
- February 2009**      Submitted proxy notice for International Education Forum & Annual Meeting to President-Elect Comber for inclusion in the March newsletter.  
Communicated availability of March issue of *Your Division Connections* on Division Web site to Chapter Presidents.
- March 2009**      Prepared for April presentations.
- April 2009**      Presented *People Reading: The Vital Role That Active Listening Plays in Effective Communication* for official visit to the White Rose Chapter – awarded 1.5 Recertification Points  
Presented *It's Not Just A Job . . . It's YOUR Career* to Bloomsburg University of Pennsylvania Secretarial Roundtable Administrative Professionals Symposium on April 22 – awarded 1 Recertification Point  
Presented *It's Not Just A Job . . . It's YOUR Career* to administrative staff at Auntie Anne's Headquarters in Lancaster on April 23 – awarded 1 Recertification Point  
Presented *Strategic Planning Workshop: How improving conditions can increase visibility and ensure your chapter is getting recognized for Excellence in Action!* for official visit to Conestoga Chapter – awarded 2 Recertification Points
- May 2009**      Attended the Pennsylvania Division Annual Meeting in King of Prussia, PA  
Will attend last official visit with Toll Gate Chapter

I was Board Mentor for the Administrative Professionals Week, Nominations, and Retirement Trust Foundation Committees, and chaired the Membership Committee. I also kept in contact with my Mentor Chapters throughout the year. I will attend the International Convention in Minneapolis, MN, in July.

I have enjoyed creating *Excellence in Action* among such a brilliant team of Pennsylvania Division Members. I appreciated the experiences I have gained while serving on the 2008-2009 Pennsylvania Division Board and look forward to future experiences.

**2008-2009 Annual Report  
IAAP® Pennsylvania Treasurer  
Carol Lundgren CPS/CAP**

May 2008	Attended Pennsylvania Division Annual Meeting in Wilkes-Barre Installed as Pennsylvania Division Treasurer Official visit to Beaver Valley Chapter, presented <i>Customer Service – It's Everyone's Job</i>
June 2008	Installed officers of Clear-Penn Chapter Attended Summer Board meeting in Harrisburg
July 2008	Forwarded International Treasurer's Communication to Chapter Treasurers, with cc to Chapter Presidents Attended International Convention and Education Forum, New Orleans, LA
August 2008	Sent letters of welcome to 7 mentor Chapter Presidents Sent reminder of dues increase to Chapter Presidents and Treasurers Sent letters of welcome to mentor committee chairs Submitted Report of Summer Board meeting for Division Newsletter Sent monthly and YTD financials to Division Officers
September 2008	Participated in Division <i>Pathways to Excellence</i> Webinar Sent Quarterly Financials to Chapter Presidents Sent monthly and YTD financials to Division Officers Coordinated Teleconference for Chapter Presidents & Division Officers Sent reminder of newsletter deadline to Western Council Presidents and mentor Chapter Chairs
October 2008	Attended Conference call with Division Officers and Chapter Presidents Sent monthly and YTD financials to Division Officers Attended Beaver Valley Chapter's 60 <sup>th</sup> Anniversary celebration Attended Webinar presented by Jean Bohinski CPS/CAP on <i>Pathways to Excellence</i>
November 2008	Presented <i>Back to Basics</i> workshop at Western Council Meeting hosted by Beaver Valley Chapter Official visit to Mount Nittany Chapter Sent monthly and YTD financials to Division Officers Sent YTD financials to Chapter Treasurers
December 2008	Coordinated Teleconference for Chapter Presidents and Division Officers Attended Quarterly conference call Attended Strategic Planning webinar Sent monthly and YTD financials to Division Officers
January 2009	Distributed International Treasurer's Communication to Chapter Treasurers Attended Winter Board meeting in King of Prussia Sent monthly and YTD financials to Division Officers
February 2009	Submitted article for Division newsletter Sent monthly and YTD financials to Division Officers Official visit to Altoona Chapter, presented <i>Etiquette for Today's Administrative Professional</i> Sent quarterly financial report to Division Chapter Presidents
March 2009	Sent monthly and YTD financials to Division Officers Official visit to Pittsburgh Chapter, presented <i>Etiquette for Today's Administrative Professional</i> Official visit to Clear-Penn Chapter, presented <i>Etiquette for Today's Administrative Professional</i> Coordinated Teleconference for Chapter Presidents and Division Officers Attended Quarterly conference call
April 2009	Attended <i>Succession Planning</i> webinar presented by Jean Bohinski CPS/CAP Sent monthly and YTD financials to Division Officers Presented program about IAAP to DuBois Business College students Official visit to Allegheny Valley Chapter, presented <i>Etiquette for Today's Administrative Professional</i>
May 2009	Will attend the 2009 Division Annual Meeting in King of Prussia Will make official visit to Presque Isle Chapter Will make official visit to Beaver Valley Chapter

I was the board mentor for the Audit and Professional Development Committees, and Historian. In June, I will be attending the Summer Board meeting in Harrisburg, and in July, I will be attending the International Education Forum and Annual Meeting in Minneapolis, MN.

I have enjoyed my second year on the PA Division Board, especially my official visits to chapters. I look forward to another great year.

### Bylaws & Standing Rules Committee Annual Report

The Committee has completed the following:

- Review and approval of the Cephalon Chapter's initial Bylaws, Standing Rules & Procedures on March 13, 2009.
- Review and approval of the Bucks County Chapter's Bylaws on April 16, 2009.
- Review of the Susquehanna Valley Chapter's initial Bylaws, Standing Rules & Procedures on April 13, 2009.
- Approved amendment to the Beaver Valley Chapter Bylaws, Standing Rules & Procedures on April 13, 2009.
- Review of proposed amendments to the Montgomery Chapter's Bylaws, Standing Rules & Procedures; awaiting receipt of final draft for review.

Notification of the deadline for submitting proposed amendments to the Pennsylvania Division Bylaws, Standing Rules and Procedures was sent to Chapter Presidents and Members at Large. Chapter Presidents and Members at Large also received a copy of the proposed amendments to the Division Bylaws, Standing Rules & Procedures. Those not having email addresses were sent hard copies

Respectfully submitted,



Myrna Jessell CAP, Chairman  
Debra Fairchild CPS/CAP  
Linda D. Schroeder CAP

TO Pennsylvania Division Board  
Chapter Presidents  
Chapter Members  
Members-at-Large  
Division Annual Meeting Parliamentarian



In accordance with IAAP® PA DIVISION BYLAWS (ARTICLE V – AMENDMENTS, Section 2. A. (4)) the following are the PROPOSED AMENDMENTS to the IAAP® PA DIVISION BYLAWS AND STANDING RULES to be presented for consideration and action by Chapter and Division Delegates during the business session at the Division Annual Meeting in King of Prussia, Pennsylvania, May 15-17, 2008.

PA DIVISION BYLAWS AND STANDING RULES COMMITTEE

Myrna Jessell CAP, Beaver Valley Chapter, Chairman  
Debra Fairchild CPS/CAP, Endless Mountains Chapter  
Linda D. Schroeder CAP, Pittsburgh Chapter

**PROPOSED AMENDMENT 1**

BYLAWS, ARTICLE III - OFFICERS, QUALIFICATIONS, NOMINATION AND ELECTION, TERM AND DUTIES, SECTION 3. NOMINATION AND ELECTION, page 2

Amend BYLAWS, ARTICLE III - OFFICERS, QUALIFICATIONS, NOMINATION AND ELECTION, TERM AND DUTIES, SECTION 3. NOMINATION AND ELECTION by inserting Paragraph E.

**Present Wording**  
Section 3. Nomination and Election  
E. None

**Proposed Wording**  
Section 3. Nomination and Election  
E. Division Officers shall not serve in any other capacity in IAAP while holding these offices. Overlapping terms of no longer than 30 days due to the time of elections shall not be considered a violation.

**Submitted by:** The Pennsylvania Division Board

**Reason:** To align more with the International Bylaws and Standing Rules.

**Recommendation:** The Pennsylvania Division Board and the Pennsylvania Division Bylaws and Standing Rules Committee recommend adoption.

**PROPOSED AMENDMENT 2**

PROCEDURES, ARTICLE IX – DISBANDING OF AN IAAP CHAPTER, Page 17

Amend PROCEDURES, ARTICLE IX – DISBANDING OF AN IAAP CHAPTER, Item 3 by renumbering to Item 4 and inserting new wording for Item 3.

**Present Wording**

3. Records, Banner and Other IAAP Property. All Records shall be turned over to the Pennsylvania Division Board Contact for disposal. The banner and other IAAP property shall be turned over to the Pennsylvania Division Board for disbursement.

**Proposed Wording**

(1) 3. Officers. Any chapter not submitting an Incoming Chapter Officers and Committee Chairmen form to International by June 30 of the current year, indicating a President and a Treasurer, will be disbanded in accordance with the chapter bylaws. Failure to receive a timely response from the chapter members will initiate a communication to International to commence disbanding procedures.

(2)

(3)

(4)

(5)

(6)

(7) 4. Records, Banner and Other IAAP Property. All Records shall be turned over to the Pennsylvania Division Board Contact for disposal. The banner and other IAAP property shall be turned over to the Pennsylvania Division Board for disbursement.

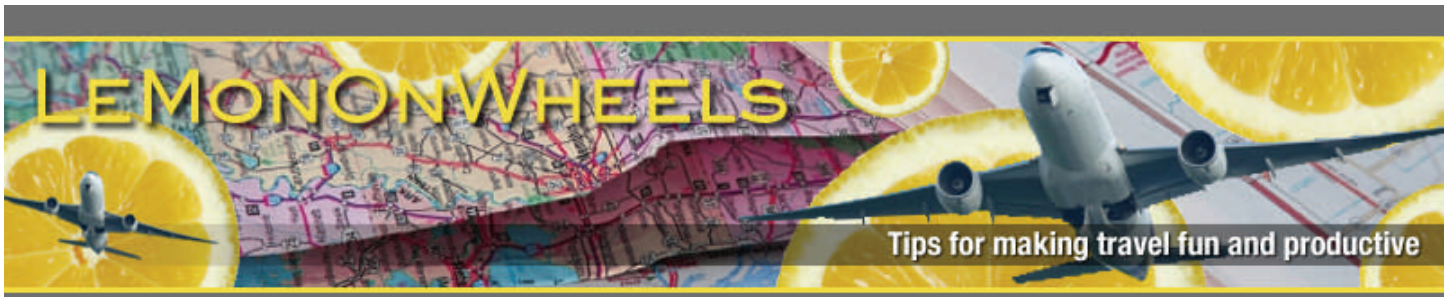
(8)

(9)

**Submitted by:** The Pennsylvania Division Bylaws and Standing Rules Committee

**Reason:** In order for a chapter to remain viable, at a minimum, a President and a Treasurer are required per International Bylaws and Standing Rules. Adoption will remove invalid chapters from the Division roll.

**Recommendation:** The Pennsylvania Division Board and the Pennsylvania Division Bylaws and Standing Rules Committee recommend adoption.



I wrote about this travel trapdoor in the first issue of LeMonAide. Five years later I am repeating some bad history.

Recently I returned a rental car in Colorado Springs. The agent walked around the vehicle, scanned the bar code on the window and gave me a receipt in less than a minute. I loved the efficiency.

About a month ago I received a written notice from this rental car company notifying me there was “damage” when I returned this car. I called the 800 number and talked with an agent who informed me the windshield had a major crack.

I did not pay a dime because of two preventative steps I take every time I rent a car. First, I never move a rental car until I have physically walked around the vehicle to assess whether or not I am driving off with someone else’s dents or damage. Second, I always ask the name of the person checking the car upon my return.

This entire conversation on the 800 number came to a quick halt when I gave them the name of the person who walked around the car. End of story.

This tidbit could save you thousands: walk around before you drive off and when you return write down the name of the person who, in effect, said with the completed contract, “This car has no damage.”



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## Join the PA Division in Minneapolis!

Registration for the 2009 International Education Forum and Annual Meeting is open! For the ultimate IAAP experience, an International Convention is a chance to network with administrative professionals from around the globe!

Vice President Cathie Hoke CPS/CAP is researching venues in the area to host the annual PA Division

Dinner . Be on the lookout for additional information from the Board for this event in late May/June.

The annual Division Photo has been scheduled for **Sunday, July 26th at 3:00**. If you are attending this year's EFAM, please join us! Group photos will be taken in **Room 210AB, 2nd Floor of the Minneapolis Convention Center.**

If you are interested in volunteering at this year's EFAM, please contact Kristi Rotvold, Volunteer Coordinator, via e-mail at [Kristi.Rotvold@meritcare.com](mailto:Kristi.Rotvold@meritcare.com).



## Planning to attend EFAM in Boston???

### Would You Like To Volunteer for the 2010 Education and Business Forum in Boston?

Did you know that volunteering at this event is a great experience? You get to network with even more with members, instructors,

etc. You can also earn 50% of your registration back if you volunteer 12 hours or more.

Any members that are interested in volunteering at the 2010 EFAM, please contact Dawn Hall CAP, [dawn@maiclt.com](mailto:dawn@maiclt.com).

Please include your name, district, division, and chapter or member-at-large status.

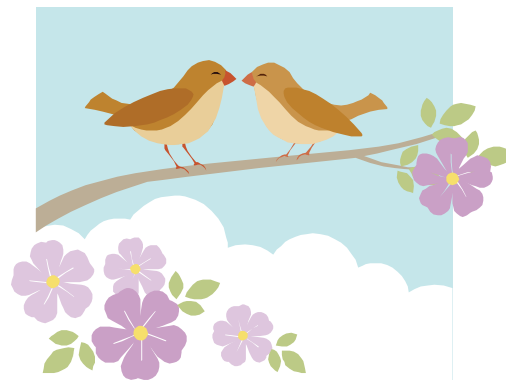


## Last Minute News...

Are you interested in reviewing the proposed changes to the International Bylaws & Standing Rules?

Please visit the Members Section of the IAAP Web Community to view or download this document.

<http://www.iaap-hq.org/MPDocs/2009ProposedBSR.pdf>



# Pathways to Excellence

## Is your Chapter a Chapter of Excellence?

A Chapter of Excellence will attain a minimum of 14 of the following 19 criteria:

1. Sixty percent of the chapter meetings offer recertification points.
2. At least one member of the chapter obtain their CPS and/or CAP certification during the current IAAP fiscal year.
3. Sign the online Chapter of Excellence Commitment agreement.
4. Publish at least six newsletters/e-newsletters.
5. Participate in the IAAP Web Community.
6. Publish annual meeting calendar with education and/or training topics by September 1 and establish marketing plan to encourage members to attend chapter, division, and international meetings and events.
7. Create and maintain an annual budget; provide a monthly financial statement to the membership and submit annual audit report to the Division Treasurer.
8. Maintain a full slate of officers (minimum four offices); maintain committee chairmen for the Bylaws, Certification, Education and Membership Committees; and submit new officers and committee chairmen listing to HQ by July 1 deadline.
9. A minimum of four officers and chairmen of the Bylaws, Certification, Education and Membership Committees; participate in at least one IAAP Leadership/Succession Planning training event.
10. Send a delegate to the Division Annual Meeting and a Delegate or submit a Proxy to the International Education Form and Annual Meeting.
11. At least one member serve in a Division office or committee; or serve on an International committee; or as an International Officer or as an RTF Trustee.
12. Sponsor or co-sponsor a professional development seminar or sponsor/co-sponsor an APW/APD and/or annual executives' event.
13. Submit a completed application for the Avery Chapter/Division Achievement Awards Program and/or submit a nomination in the Aware for Excellence Program.
14. Maintain a minimum of 15 members and achieve an annual retention rate of at least 80 percent.
15. Conduct at least one IMPACT meeting.
16. Conduct new member orientation program.
17. Achieve a net membership increase of at least 12 percent (minimum required is a net 3 member increase).
18. Sponsor a new IAAP Professional Chapter or Student Chapter.
19. Create an annual Business (Strategic) Plan; review/update annually; submit a copy to the Division President by December 31 and conduct an annual member interest/satisfaction survey.

Completed criteria will be submitted through an online process.

Submission forms can be found in the Members section of the IAAP HQ Web Community - [www.iaap-hq.org](http://www.iaap-hq.org). Select the Pathways To Excellence tab and drill down to the Chapter of Excellence section.

