



Tri-County IAAP - November Chapter Meeting  
Heisler, Rebecca J.

4 Attachments



Chapter Agenda 2012 November 6.doc



2012-2013 Audit.pdf



2012 2013 \$ requested.xlsx



Dec 12 flyer.docx

*Dear Members,*

*Reminder: RSVPs due to Mary Pyatt by Friday, November 2. Please come and join us for an educational evening, we have much to talk about.*

*Also, we have an important guest attending Victoria Presita, our IL Division Secretary, who will provide us with an IL Division Update.*

*You will find attached several documents for your review. (Agenda, Budgets, Audit Report, December Flyer)*

*Again, I am looking forward to seeing each of you. Don't forget to VOTE!!!*

*See you on Tuesday,*

*Rebecca*

***Rebecca Heisler***

*Tri-County IAAP President, 2012-2013*

*309-655-2590 work*

*309-645-5662 cell*

### *Additional Reminders:*

- *Please promote the sale of our Bergner Community Day Booklets by either purchasing a booklet for yourself, selling one to a friend, family member, co-worker or neighbor. If you were not at the October meeting, please contact me, Judy Zimmerman, via e-mail: [judy.l.zimmerman@osfhealthcare.org](mailto:judy.l.zimmerman@osfhealthcare.org) or by phone @655-2057 to request booklets. The booklets are \$5.00 and our chapter retains the full \$5.00. The booklets will still be available at our November meeting as Community Days are November 9 & 10.*
- *The November meeting is also the last opportunity to purchase raffle tickets for the quilt. The chances are \$1.00 each or [6@\\$5.00](#). The drawing will be held at the November meeting.*
- *Bring your "Box Tops" and "Dress for Success" donations!!*

### **Dates:**

The Illinois Division has a TON of great stuff planned over the next several weeks. You won't want to miss these fantastic events!!! Get more information about any of these events at [www.iaap-illinoisdivision.org](http://www.iaap-illinoisdivision.org)

**November 5 - December 17, 2012 (Monday evenings, 7-9 pm CT) - Excel 2010 ONLINE certification study group.** We are currently winding down our Microsoft Word 2010 certification study group to rave reviews. Next up, we'll be covering Excel 2010 in seven weeks and preparing the students for the core and expert certification exams. Best part? You get to join us from the comfort of your own home via webinar. Cost is just \$50 for IAAP members and \$75 for everyone else. Requires the purchase of two books (same books used across all the study groups we offer though).

November 6, 2012 – Tri-County Chapter Meeting: (Webinar) *The AP Odyssey into the Future*

**November 7, 2012 7:00 pm CT - Webinar - Show Value During Performance Reviews!!!** Free for Illinois Division members, just \$10 for everyone else. Our next webinar will be Jan Marino (career coach extraordinaire!) teaching us how to Show Value During Performance Reviews. Everyone can learn something about this important subject! Webinar has been approved for one recertification point.

December 4, 2012 – Tri-County Chapter Meeting: (Webinar) *Full Speed Ahead: Self-Success Tips for the Career-Minded*

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**TRI-COUNTY CHAPTER IAAP  
MEETING AGENDA**

November 6, 2012

5:15-6:00 p.m. Dinner and Networking

6:00 p.m. Business Meeting

6:30 p.m. Speaker

*Location: The Rally Point*

*Peoria, IL*



- I. Call to Order.
- II. Ice Breaker - Deanna Klein
- III. Welcome Guests
- IV. Welcome New Members - Lori Mattiazza, Jennifer Byrd, Jessica Janowiak
- V. Announcements
  - a. Illinois Division Update by: Victoria Presita, 2012-2013 Illinois Division Secretary
  - b. Pathway to Excellence - Member of Excellence by: Tonda Stewart
  - c. Treasurer Report - Deb Steveson
  - d. Approval -2012-2013 Committee Budget Review
  - e. Approval October Chapter Minutes
- VI. Guest Speaker & Topic: Donna Greer, Midstate College Program Director- Information Systems & Technology; "The AP Odyssey into the Future"
- VII. Raffle Drawing
- VIII. Adjourn - (Fill out Evaluation Form)
- IX. New Member Orientation - Donna Greer after meeting - 20 minutes

**The next Tri-County Chapter meeting will be held**

**Tuesday, December 4, 2012.**

**Dewoun Hayes, "Full Speed Ahead: Self-Success Tips for the Career-Minded"**

**IAAP Code of Ethics:** Recognizing that apposition of trust imposes ethical obligations upon administrative assistants, office coordinators, executive secretaries, and other types of administrative professionals to act for benefit of employers, clients, and the public, member of the International Association of Administrative Professionals established a promulgated four standards of professional conduct and resolve to be guided by them as embodying the ethical ideals of their profession.

2012-2013 Budget Summary	
Approved	
Leadership Committee	\$20.00
Professional Development	\$600.00
Administrative	\$600.00
PR & Marketing	\$350.00
Membership	\$400.00
WaysNMeans	\$50.00
	<b>\$2,020.00</b>

## TRI-COUNTY IAAP AUDIT

SEPTEMBER 29, 2012

The items examined in this audit were:

1. Bank balance reconciled with check register:
  - a. Outcome: The PNC check register balanced although both PNC and the Chase accounts were combined on the computer register. The bank accounts need to be on separate registers. The PNC account had a balance of \$575.12 as of 8.14.12. According to the deposits, checks and fees, the Chase bank account is overdrawn \$30.62.
2. Expenses were properly recorded in the Cash Disbursement book ~ check register.
  - a. Outcome: The expenses were properly recorded.
3. Review the checkbook to determine that there are no checks signed in advance.
  - a. Outcome: There were not any checks signed in advance.
4. Spot check that the vouchers were filed for the checks written.
  - a. Outcome: The vouchers were properly filed.  
(need to have receipts attached to all vouchers)

The 2011-2012 Treasurer's records were found to be in order and will be turned over to Deb Stevenson, 2012-2013 Treasurer.

  
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Teri Cagle, CAP  
Audit Committee  
September 29, 2012

Recommendations for the next audit:

1. All income receipts need to have dates on them even though there is a receipt, deposit slip, etc.
2. Deposits need to be made within a week after the event.
3. Hand checkbook off to the auditor at the June meeting.
4. Hand checkbook off to the new Treasurer at the Strategic Planning Meeting.
5. All projects need to be closed at the end of June.
6. For the upcoming year 2012-2013, all requesters for reimbursement, are to provide receipts in an envelope with reason and dollar amount to the treasurer.

Helpful hints to help with audits:

- \*Staple the carbon copy of check to the expense reimbursement/payment to vendor, and the voided check along with the carbon copy gets stapled to the expense reimbursement/payment to vendor.
- \*Make sure forms are dated and completely filled out (expense reimbursement/payment to vendor, income deposit form, etc.)
- \*Separate the fiscal years with colored paper.
- \*Separate years with tabs.

*IAAP Tri-County Chapter On-line Meeting / Webinar*  
*December 4, 2012 ● Meeting at 6:00 PM CST ●*  
*Webinar at 6:30 PM CST ● \$10.00*  
*(Free to Tri-County Members!)*



## *Full Speed Ahead: Self-Success Tips for the Career-Minded*

*Presented by Dewoun Hayes, MAEd, CAP-OM, Elite Office Concepts, Inc.*  
*(<http://adminhotspot.blogspot.com/>)*

Your life is your business; you are the CEO of your own company called SELF. This means you profit and prosper from the decisions you make and actions you take. As the CEO, you are responsible for planning, organizing, managing, and executing goals and objectives in order to grow.

Are you managing yourSELF effectively and efficiently? Is your business going according to plan? What is your vision of yourSELF? This workshop will provide the necessary tools needed to start your SELF Success Portfolio and identify the steps needed to put you on the right track to being successful in the workplace.

- Create task lists that motivate
- Understand the value of mentor partnerships
- Devise effective methods for problem solving
- Think critically about the next steps related to career choices
- Recognize and take advantage of hidden talents

*Register online at:*

*<http://form.jotformpro.com/form/22905527028958>*

Log-in information will be emailed to you with confirmation of your registration!

*1 Recertification Point!*