

Pathways to Excellence

What to keep in case of an audit

Member of Excellence

Valid for 2009-2010 Submission for Member of Excellence

During the course of the year, members will work towards success, completing criteria and retaining the documentation of achievement. Once eight (8) “points” have been earned – and by June 30 at the latest – members log onto the IAAP web site and submit an electronic application. For ease in completing the on-line form, it is recommended that members draft their entry using the Excel worksheet that has been prepared. The details contained in the worksheet can be cut-and-pasted into the on-line form.

Audit evidence can be submitted electronically (preferred) or paper copy. It is the responsibility of the member being audited to have the material organized in a way that the auditor can follow the “Paper Trail” easily. The suggestions contained in this document are not hard-and-fast/absolute but rather are based on experiences of the first audit and the questions that have been received regarding the program.

MoE Category - #1: Certification

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| Criteria “and/or” | Be a current CPS and/or CAP |
| How to qualify | <ul style="list-style-type: none"> • Earn your Certified Professional Secretary® designation and/or your Certified Administrative Professional® designation • If you have already earned your CPS/CAP, ensure you recertify regularly so your designations remain valid • Once you have earned your designation and provided you keep it current, you may claim this point annually |
| Evidence to submit (<u>any one</u> of the following) | <ul style="list-style-type: none"> • Copy of certification certificate or plaque • Copy of letter of congratulation for passing exam • Copy of letter of congratulation for recertifying • Copy of recertification certificate • Copy of Active Members List showing designation |

MoE Category - #2: Commitment

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|---------------------------|---|
| Criteria | Sign the online Member of Excellence Commitment agreement |
| How to qualify | <ul style="list-style-type: none"> • Simply sign the Commitment form and then save it so it is available in the event of an audit. |
| Evidence to submit | <ul style="list-style-type: none"> • Copy of signed/dated Commitment Form |

MoE Category - #3: Communication

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| Criteria (“or”) | Actively participate in the IAAP web community forum discussions or submit an article for an IAAP publication (chapter, division or international level) |
| How to qualify (a combination of any of the following:) | <ul style="list-style-type: none"> • Participate in forum discussions on the IAAP web community – more than one time • Write an article for your chapter or division web page and have it posted • Write an article for your chapter or division newsletter or for OfficePRO magazine and have it published. Article must be a minimum of 200 words and an original article. Recommending someone else’s article for inclusion does not qualify. |
| Evidence to submit (<u>any one</u> of the following) | <ul style="list-style-type: none"> • Copy of all posts to the web community <ul style="list-style-type: none"> ○ Log onto the web community and click on eGroups; click on My Messages. You will find a listing of your activity of the eGroups • Copy of the newsletter page(s) where your article appeared • Copy of your chapter or division web page where your article is/was posted |

MoE Category - #4: Education and Training

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| Criteria | Attend non-IAAP professional educational workshops, seminars and conference |
| How to qualify | <ul style="list-style-type: none"> • Training session to be a minimum of 60 minutes in length and relevant to your work role or would earn recertification points if this session was delivered at an IAAP event • Topic must be professional in nature relating to – for example – your work role, leadership, communication, technical skills, etc. |
| Evidence to submit (any one of the following) | <ul style="list-style-type: none"> • Copy of certificate of attendance • Copy of letter from employer confirming participation • Copy of letter from education provider confirming participation |

MoE Category - #5: Education and Training

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| Criteria (“or”) | Hold a degree, certificate or equivalent (a minimum of one year in length) from an accredited college or earn a Microsoft certification |
| How to qualify | <ul style="list-style-type: none"> • Earn a Microsoft certification in the current year or hold a valid certification earned prior • Earn a degree, certificate or equivalent from an accredited college or university in the current year or prior |
| Evidence to submit (any one of the following) | <ul style="list-style-type: none"> • Copy of degree or certificate/diploma • Copy of transcript • Copy of Microsoft certificate |

MoE Category - #6: Fiscal Responsibility – Mandatory Requirement

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| Criteria | Pay membership dues on or before anniversary date |
| How to qualify | <ul style="list-style-type: none"> • Pay membership dues on or before anniversary date |
| Evidence to submit | <ul style="list-style-type: none"> • Copy of receipt showing payment date • HQ to confirm |

MoE Category - #7: Leadership Development and Roles

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| Criteria (“or”) | Serve as a chapter, division or international officer, committee chair or committee member; <u>or</u> serve as an RTF Trustee; <u>or</u> serve on a Student Chapter advisory board or the school’s advisory board for the Office Administration Program |
| How to qualify | <ul style="list-style-type: none"> • Serve as a chapter officer or • Serve as a division officer or • Serve as an international officer or • Serve as a chapter committee chair or • Serve as a chapter committee member or • Serve as a division committee chair or • Serve as a division committee member or • Serve as an international committee chair or • Serve as an international committee member or • Serve as the Advisor to a Student Chapter or • Serve as a member of a College/University Office Administration Advisory Committee |
| Evidence to submit | <ul style="list-style-type: none"> • Letter from chapter president confirming participation at the chapter level or copy of chapter newsletter showing list of chapter officers or copy of chapter’s “Officer and Committee Chair” report submitted to HQ or copy of official business card or copy of “Certificate of Appreciation” issued by chapter at AGM • Letter from division president confirming participation at the division level or copy of division newsletter showing list of division officers or copy of division’s “Officer and Committee Chair” report submitted to HQ or copy of official business card or copy of “Certificate of Appreciation” issued by division at AGM • Letter from international board or international committee chair confirming participation at the international level • Copy of Advisory Committee meeting minutes showing your name in list of attendees • Copy of letter from college/university confirming your participation on advisory committee – on school letterhead or in an email with obvious email address originating from the school |

MoE Category - #8: Marketing, Research and Community Outreach

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| Criteria ("or") | Conduct a public presentation, program or training at least 60 minutes in length |
| How to qualify | <ul style="list-style-type: none"> • Examples of presentations include: <ul style="list-style-type: none"> ○ Workplace training in presentation format (rather than 1:1) ○ Presentation at a chapter or division meeting or at international Education Forum ○ Presentation to students ○ Promotion presentation on IAAP to a group of potential members such as an office lunch-and-learn session • Presentation does not need to qualify for recertification points |
| Evidence to submit | <ul style="list-style-type: none"> • Copy of conference brochure featuring your presentation • Copy of certification points or CEU points awarded for the session • Letter of appreciation/certificate of appreciation for your presentation • If you do not receive a formal letter, copy of email confirming your invitation to speak and a copy of the presentation you gave (printed as handout 6-up is sufficient) |

MoE Category - #9: Programs and Participation

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| Criteria | Attend a minimum of eight chapter, division or international sponsored meetings, programs or events (any combinations) |
| How to qualify | <ul style="list-style-type: none"> • Attend at least eight events from among the following list of opportunities <ul style="list-style-type: none"> ○ Attend monthly chapter meetings ○ Attend monthly chapter meetings at a neighbouring chapter ○ Attend monthly chapter board meetings ○ Attend/participate in chapter Member Recruitment meeting ○ Attend special chapter celebration such as anniversary event ○ Attend APW®/APD® event ○ Attend chapter leaders' workshop ○ Attend division leaders' workshop ○ Attend division board meeting ○ Attend Division Annual Meeting ○ Attend Professional Education Conference ○ Attend International Education Forum and Annual Meeting |
| Evidence to submit (any one of the following) | <ul style="list-style-type: none"> • Copy of certificate of participation • Copy of receipt for payment at chapter meeting/event • Letter from chapter president or registration chair confirming attendance |

MoE Category - #10: Recruitment and Retention

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|---------------------------|--|
| Criteria | Recruit at least one new member |
| How to qualify | <ul style="list-style-type: none"> • Recruit a new member |
| Evidence to submit | <ul style="list-style-type: none"> • Provide the name of the member you recruit; if possible provide member number as well. HQ will confirm |

MoE Category - #11: Strategic Planning

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| Criteria | <p>Integrate IAAP membership and involvement into annual performance plan or review</p> <ul style="list-style-type: none"> ○ Annual Performance Plan ○ Setting goals for IAAP ○ Setting goals for your job ○ Setting personal goals |
| How to qualify | <p>During your regular performance review/objective planning sessions with your employer, incorporate your IAAP involvement in the plan</p> <ul style="list-style-type: none"> ○ Include your progression through the various IAAP roles showing your commitment to continuous learning and leadership training ○ Include leadership skills you plan to learn as a result of your involvement ○ Include benefits you will be bringing back to your organization as a result of your involvement in IAAP ○ Personal goals might include developing presentation skills, improving communication skills, etc. <p>In the event that your employer deems your objectives document to be proprietary/confidential,</p> |

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| | <p>have your manager sign a letter outlining how you have incorporated IAAP and indicating your company's support for your plans.</p> <p>If your company does not have a Performance Plan program, we are attaching a sample Individual Development Plan template you can use to initiate discussions with your manager.</p> |
| Evidence to submit | <ul style="list-style-type: none"> • Photocopy of that portion of your Performance Plan illustrating the incorporation of IAAP • Letter from your employer confirming the incorporation of IAAP in your career development • Individual Development Plan signed by your manager, indicating support |

SAMPLE INDIVIDUAL DEVELOPMENT PLAN

Goals for Successful Performance in Current Position. The Individual Development Plan (IDP) is not just a tool to move an individual closer to their career goals. It should also be used to develop skills in their current positions. This space is for goals that will help in current job/leadership responsibilities.

Short-Term Career Goals. This is a statement of what the individual hopes to achieve within the next three years. Examples: get a promotion, manage a project, achieve a certification in a professional program (e.g., CPS or CAP)

Long-Term Career Goals. This is a statement of what the individual hopes to achieve after three years or more. Examples: become a department manager / become a division president; achieve a professional degree

Developmental Objectives. These are statements defining what the individual needs to do to achieve his or her short-term and long-term goals. Examples: learn about time management; become a good public speaker

Developmental Assignments. This is a list of the strategies the individual will use to achieve the developmental objectives. Examples: attend time management training; join Toastmasters

Proposed Dates. This is a list of proposed dates when the individual will work on the specific development assignments and an

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| intended deadline for completion. |
| <i>Estimated Costs.</i> This is a list of the approximate cost of each of the activities. Example: tuition fees, organizational dues |
| <i>Date Completed.</i> This is a list of the actual dates the developmental assignment was completed. |
| <i>Notes.</i> Any additional comments that are appropriate to the IDP go here. |
| <i>Signature/Date.</i> The IDP should be signed and dated by the individual, showing their commitment to this process. |

Adapted from Succession Planning Basics (p. 61) by Christee Gabour Atwood.

Pathways to Excellence

What to keep in case of an audit

Chapter of Excellence

During the course of the year, chapters and members will work towards success, completing criteria and retaining the documentation of achievement. Once fourteen (14) “points” have been earned – and by the due date indicated by HQ at the latest – chapter presidents log onto the IAAP web site and submit an electronic application. The electronic application will be automatically forward to the chapter treasurer for confirmation. For ease in completing the on-line form, it is recommended that chapter presidents draft their entry using the Excel worksheet that has been prepared. The details contained in the worksheet can be cut-and-pasted into the on-line form.

Audit evidence can be submitted electronically (preferred) or paper copy. It is the responsibility of the chapter being audited to have the material organized in a way that the auditor can follow the “Paper Trail” easily. The suggestions contained in this document are not hard-and-fast/absolute but rather are based on experiences of the first audit and the questions that have been received regarding the program.

CoE Category - #1: Certification

| | |
|---------------------------|---|
| Criteria | Sixty percent of the chapter meetings offer recertification points |
| How to qualify | <ul style="list-style-type: none"> • Chapter Education/Program chair or Certification chair submit a request to recertification points to HQ prior to the chapter meeting – least 14 days prior to the date of the chapter meeting <ul style="list-style-type: none"> ○ Submission to include speaker bio, a copy of the meeting invitation and a brief description of the presentation to be given • Recertification points are not awarded after the date of the chapter meeting • Presentations must be a minimum of 60 minutes in length and relate to CPS/CAP criteria. • Even if a chapter does not have any certified members, the submission for recertification points should be made; it is possible a certified member from another chapter or from the division board might visit and providing them with recertification points is a helpful “thank you” |
| Evidence to submit | <ul style="list-style-type: none"> • Copy of recertification certificates for all meetings |

CoE Category #2: Certification

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|---------------------------|--|
| Criteria | At least one member of the chapter obtain their CPS and/or CAP certification during the current IAAP fiscal year |
| How to qualify | <ul style="list-style-type: none"> • One member of the chapter achieves their designation. |
| Evidence to submit | <ul style="list-style-type: none"> • Name and membership number of successful member <ul style="list-style-type: none"> ○ While the chapters may not have received a copy of the list of successful candidates by June 30, the chapter’s Active Members Report of June 30 should have been updated to show the certification designation • To be confirmed by HQ |

CoE Category - #3: Commitment

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|---------------------------|--|
| Criteria | Sign the online Chapter of Excellence commitment Agreement |
| How to qualify | <ul style="list-style-type: none"> • Simply sign the Chapter of Excellence commitment form <ul style="list-style-type: none"> ○ It is suggested that the CoE form be signed at the first chapter meeting of the year in front of the membership |
| Evidence to submit | <ul style="list-style-type: none"> • Copy of signed/dated Commitment Form |

CoE Category - #4: Communication

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|--|---|
| Criteria | Publish at least six newsletters/e-newsletters |
| How to qualify | <ul style="list-style-type: none"> • Publish communication with chapter members at least six times during the year <ul style="list-style-type: none"> ○ Can be e-mailed to members or be posted on chapter web site or chapter e-Group |
| Evidence to submit (any one of the following) | <ul style="list-style-type: none"> • Copy of front page of each newsletter published • Copy of e-newsletter |

CoE Category - #5: Communication

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|---------------------------|--|
| Criteria | Participate in IAAP Web Community |
| How to qualify | <ul style="list-style-type: none"> Chapter web site is hosted on IAAP web community Chapter posts information on eGroups Chapter participates in on-line discussion groups |
| Evidence to submit | <ul style="list-style-type: none"> Print screen of chapter web site showing URL Copies of posts to the eGroups Lists of forums participated in by chapter leaders. Chapter leader to log onto the web community and click on eGroups; click on My Messages. You will find a listing of your activity of the eGroups |

CoE Category - #6: Education and Training

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|---------------------------|--|
| Criteria (“and”) | Publish annual meeting calendar with education and/or training topics by September 1 st <u>and</u> establish marketing plan to encourage members to attend chapter, division and international meetings and events |
| How to qualify | <ul style="list-style-type: none"> Publish list of chapter programs by the deadline Document a plan for encouraging members to attend events <ul style="list-style-type: none"> Suggestions include but not required: reduced pricing at special events, introducing chapter contest to encourage participation, financial assistance for a chapter delegate and/or alternate at Division Annual Meeting or EFAM |
| Evidence to submit | <ul style="list-style-type: none"> Copy of the calendar accompanied by copy of email (showing date) with which the calendar was distributed to members or letter from Chapter web master confirming calendar was posted by the deadline Copy of marketing plan |

CoE Category #7: Fiscal Responsibility

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|---------------------------|---|
| Criteria (“and”) | Create and maintain an annual budget; provide a monthly financial statement to the membership <u>and</u> submit annual audit report to the division treasurer |
| How to qualify | <ul style="list-style-type: none"> Chapter has an annual budget that is managed by chapter treasurer Chapter members receive a copy of the financial statement monthly – can be distributed at chapter meetings or be posted on chapter web site Annual audits are performed according to chapter Bylaws and report is forwarded to division treasurer |
| Evidence to submit | <ul style="list-style-type: none"> Provide all of the following <ul style="list-style-type: none"> Copy of chapter budget Copy of each month’s financial statement – if posted on the web site, copy of email advising chapter members that the update has been posted Copy of letter/e-mail from Division Treasurer acknowledging receipt of audit report |

CoE Category - #8: Leadership Development and Roles

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|---------------------------|---|
| Criteria (“and”) | Maintain a full slate of officers (minimum four offices); maintain committee chairs for the Bylaws, certification, Education and Membership Committees; and submit new officers and committee chair listing to HQ by July 1 deadline. |
| How to qualify | <ul style="list-style-type: none"> Submit new officer and committee chairs listing to HQ by July 1 |
| Evidence to submit | <ul style="list-style-type: none"> To be confirmed by HQ |

CoE Category - #9: Leadership Development and Roles

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|---------------------------|---|
| Criteria | A minimum of four officers and chairs of the Bylaws, certification, Education and Membership committees participate in at least one IAAP Leadership/Succession Planning training event of at least 60 minutes in length |
| How to qualify | <ul style="list-style-type: none"> Chapter holds a training event; can be incorporated as part of chapter planning day – IAAP-specific training must be at least 60 minutes in length |
| Evidence to submit | <ul style="list-style-type: none"> Provide <u>all</u> of the following: <ul style="list-style-type: none"> Copy of new officer and committed chairs list Copy of brochure or email invitation to the meeting Copy of attendees list from meeting |

CoE Category - #10: Leadership Development and Roles

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|---------------------------|---|
| Criteria (“and”) | Send a delegate to the Division Annual Meeting <u>and</u> a delegate or submit a proxy to the International Education Forum and Annual Meeting |
| How to qualify | <ul style="list-style-type: none"> Send a delegate to the DAM Send a delegate or submit a proxy for EFAM |
| Evidence to submit | <ul style="list-style-type: none"> Copy of DAM registration form showing delegate registration Copy of EFAM registration form showing delegate registration or copy of proxy form |

CoE Category - #11: Leadership Development and Roles

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|---------------------------|---|
| Criteria | <ul style="list-style-type: none"> At least one member serves in a division office or committee or At least one member serves on an international committee or At least one member serves as an international officer or At least one member serves as an RTF trustee |
| How to qualify | <ul style="list-style-type: none"> At least one member serves in a division office or committee or At least one member serves on an international committee or At least one member serves as an international officer or At least one member serves as an RTF trustee |
| Evidence to submit | <ul style="list-style-type: none"> Copy of Division Officers and Committee Chairs form showing chapter member’s role or Copy of letter/email/certificate from Division President confirming chapter member’s role or Copy of letter/email from the division officer/committee chair with a signature block showing role Copy of photos from “Connections” introducing new International Board showing chapter member or copy of International letterhead showing chapter member’s name listed Copy of letter/email/certificate from RTF Committee chair confirming chapter member’s role Copy of letter/email/certificate from International committee chair confirming chapter member’s role |

CoE Category - #12: Programs and Participation

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|----------------------------|---|
| Criteria (“and/or”) | Sponsor or co-sponsor a professional development seminar <u>and/or</u> sponsor/co-sponsor and APW/APD <u>and/or</u> annual Executives event |
| How to qualify | <ul style="list-style-type: none"> Chapter is involved in sponsoring a professional development seminar Chapter is involved in sponsoring an APW/APD event Chapter is involved in sponsoring an Executives event <ul style="list-style-type: none"> Members’ executives can be invited to attend a meeting with them that has been tailored to focus on the executive’s perspective of IAAP and working with their admins, for example |
| Evidence to submit | <ul style="list-style-type: none"> Copy of the brochure advertising the educational seminar Copy of the program and announcement for the APW/APD event Copy of the program and announcement for the Executive event |

CoE Category - #13: Programs and Participation

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|----------------------------|--|
| Criteria (“and/or”) | Submit a completed application for the Avery Chapter/Division Achievement Awards Program <u>and/or</u> submit a nomination in the Award of Excellence program |
| How to qualify | <ul style="list-style-type: none"> Submit an application to the Avery program Submit an application to the Award of Excellence Program |
| Evidence to submit | <ul style="list-style-type: none"> Copy of application HQ can confirm |

CoE Category - #14: Recruitment and Retention

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| Criteria (“and”) | Maintain a minimum of 15 members <u>and</u> achieve an annual retention rate of at least 80 per cent |
| How to qualify | <ul style="list-style-type: none"> Meet the criteria Retention to be calculated based on chapter membership at June 30 of the previous year and June 30 of the current year – 80% of the names from the previous year must still be reflected at the end of the current year |

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| Evidence to submit | <ul style="list-style-type: none"> Chapter information can be confirmed by HQ; chapters can calculate whether they qualify from the records they receive throughout the year |
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CoE Category - #15: Recruitment and Retention

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|---------------------------|---|
| Criteria | Conduct at last one Member Recruitment meeting |
| How to qualify | <ul style="list-style-type: none"> Chapter holds at least one meeting where the focus is on promoting IAAP and bringing in new members |
| Evidence to submit | <ul style="list-style-type: none"> Copy of program and marketing material |

CoE Category - #16: Recruitment and Retention

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| Criteria | Conduct new member orientation program |
| How to qualify | <ul style="list-style-type: none"> Chapter develops a program to orient new members with information about IAAP, how the association works, policies, protocols and opportunities, etc. |
| Evidence to submit | <ul style="list-style-type: none"> Copy of brochure and program presented |

CoE Category - #17: Recruitment and Retention

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| Criteria | Achieve a net membership increase of at least 12% (minimum required is a net 3 member increase) |
| How to qualify | <ul style="list-style-type: none"> Chapter grows by 12% between July 1 and June 30 of the IAAP fiscal year |
| Evidence to submit | <ul style="list-style-type: none"> Information to be confirmed by HQ; chapter can check the Chapter Active Members Report on June 30 to see if they qualify |

CoE Category - #18: Recruitment and Retention

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|---------------------------|--|
| Criteria ("or") | Sponsor a new IAAP Professional Chapter or Student Chapter |
| How to qualify | <ul style="list-style-type: none"> Chapter sponsors a new professional or student chapter |
| Evidence to submit | <ul style="list-style-type: none"> Information to be confirmed by HQ |

CoE Category - #19: Strategic Planning AND Marketing Research & Community Outreach

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|---------------------------|--|
| Criteria ("and") | Create an annual Business (Strategic) Plan; review/update annually; submit a copy to the Division President by December 31 st ; <u>and</u> conduct an annual member interest/satisfaction survey |
| How to qualify | <ul style="list-style-type: none"> Chapter documents a Business (Strategic) Plan and ensures it is transferred to the new board at year end and is reviewed/updated by the new board as they begin their leadership year Chapter provides Division President with copy of chapter plan by December 31st Chapter conducts an annual survey of members |
| Evidence to submit | <ul style="list-style-type: none"> Provide <u>all</u> of the following: <ul style="list-style-type: none"> Copy of Business Strategic Plan showing when it was last updated – if it is new, only current date is required Letter from Division President acknowledging receipt of plan by the due date Copy of the member survey, a dated copy of the email distributing the survey – or some evidence from the on-line service if used – and the results of the survey |

Pathways to Excellence

What to keep in case of an audit

Division of Excellence

During the course of the year, divisions will work towards success – building on the success of their chapters and members – completing criteria and retaining the documentation of achievement. Once fourteen (14) “points” have been earned – and by July 5 at the latest – division presidents log onto the IAAP web site and submit an electronic application. The electronic application will be automatically forward to the division treasurer for confirmation. For ease in completing the on-line form, it is recommended that division presidents draft their entry using the Excel worksheet that has been prepared. The details contained in the worksheet can be cut-and-pasted into the on-line form.

Audit evidence can be submitted electronically (preferred) or paper copy. It is the responsibility of the division being audited to have the material organized in a way that the auditor can follow the “Paper Trail” easily. The suggestions contained in this document are not hard-and-fast/absolute but rather are based on experiences of the first audit and the questions that have been received regarding the program.

DoE Category - #1: Certification

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|---------------------------|--|
| Criteria | Seventy-five percent (75%) of the chapters offer at least one program that awards re-certification points |
| How to qualify | <ul style="list-style-type: none"> • Check with chapters within the division; determine how many have applied for/received recertification points <ul style="list-style-type: none"> ○ Division board will need to work with chapters to help them plan programs that earn recertification points |
| Evidence to submit | <ul style="list-style-type: none"> • Copy of each chapter’s program list • Copy of each chapter’s recertification points |

DoE Category - #2: Certification

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|---------------------------|---|
| Criteria | The Division Annual Meeting offers a minimum of three (3) recertification points |
| How to qualify | <ul style="list-style-type: none"> • Organizers for DAM request recertification points for the education session(s) – minimum 3 hours/3 points |
| Evidence to submit | <ul style="list-style-type: none"> • Copy of recertification certificates awarded at DAM |

DoE Category - #3: Certification

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|---------------------------|--|
| Criteria (“and”) | 20% of the members within the division must hold the CPS and/or CAP certification; and the division recognizes new certification holders and those who recertify |
| How to qualify | <ul style="list-style-type: none"> • HQ will confirm the percentage of division members who are certified; division can make the calculation by filtering the Active Members Report for June – the filter will count the number of members who hold their CPS and/or CAP – mathematical calculation can follow • Division establishes a plan to recognize new certification holders and those who recertify. <u>Suggestions</u> (divisions may come up with their own idea) include <ul style="list-style-type: none"> ○ Division president sends congratulatory letter or email to member when the information is received from HQ ○ Division recognizes the successful members at the Division Annual Meeting <ul style="list-style-type: none"> ▪ Certificate of accomplishment ▪ Token gift ▪ Public introduction |
| Evidence to submit | <ul style="list-style-type: none"> • Copy of the program/brochure for the event where the successful member(s) was/were recognized • HQ will verify percentage |

DoE Category - #4: Commitment

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|---------------------------|---|
| Criteria | Sign the online Division of Excellence Commitment agreement |
| How to qualify | <ul style="list-style-type: none"> • Simply sign the Division of Excellence commitment form <ul style="list-style-type: none"> ○ Suggestion is to sign the form at a division event such as a leadership training workshop |
| Evidence to submit | <ul style="list-style-type: none"> • Copy of signed/dated Commitment Form |

DoE Category - #5: Communication

| | |
|---------------------------|--|
| Criteria (“and”) | Publish a minimum of four (4) newsletters/e-newsletters and participate in the IAAP Web Community |
| How to qualify | <ul style="list-style-type: none"> • Division publishes at least four newsletters or e-newsletters • Division web site is hosted on the Web Community • Division communicates with members and chapter leaders via a division e-Group |
| Evidence to submit | <ul style="list-style-type: none"> • Copy of front page of each newsletter/e-newsletter • Image of division web site • Copy of postings on division e-Group |

DoE Category - #6: Education and Training

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|---------------------------|--|
| Criteria (“and”) | Provide leadership training for chapter and division leaders which emphasizes the development of a chapter business (strategic) plan and succession planning |
| How to qualify | <ul style="list-style-type: none"> • Division holds a leadership training event; event can encompass other training but must address this topic |
| Evidence to submit | <ul style="list-style-type: none"> • Copy of brochure and program agenda of topics covered |

DoE Category - #7: Fiscal Responsibility

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|---------------------------|---|
| Criteria (“and”) | Create and maintain an annual budget; provide a quarterly financial statement to the chapter presidents; and submit the annual audit report to the International Treasurer |
| How to qualify | <ul style="list-style-type: none"> • Division has an annual budget that is managed by division treasurer • Chapter members receive a copy of the financial statement quarterly – can be distributed at chapter meetings or be posted on chapter web site • Annual audits are performed according to division Bylaws and report is forwarded to International treasurer |
| Evidence to submit | <ul style="list-style-type: none"> • Provide all of the following <ul style="list-style-type: none"> ○ Copy of annual approved budget ○ Copy of dated email or communication provided to chapter presidents quarterly ○ Copy of email or letter from International Treasurer verifying receipt of audit report |

DoE Category - #8: Leadership Development and Roles

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|---------------------------|---|
| Criteria (“and”) | Maintain a full slate of division officers (minimum four offices); one hundred percent of the chapters must submit their new officers and chair listing to HQ by July 1; and the division must submit their new officer and committee chair listing to HQ by July 1 |
| How to qualify | <ul style="list-style-type: none"> • Submit new officer and committee chairs listing to HQ by July 1 |
| Evidence to submit | <ul style="list-style-type: none"> • To be confirmed by HQ |

DoE Category - #9: Leadership Development and Roles

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|---------------------------|--|
| Criteria (“and”) | Maintain chairs for the Bylaws, Certification, Education and Membership committees |
| How to qualify | <ul style="list-style-type: none"> • Division fills these four chair roles; |
| Evidence to submit | <ul style="list-style-type: none"> • To be confirmed by HQ |

DoE Category - #10: Leadership Development and Roles

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|---------------------------|---|
| Criteria (“or”) | Division member(s) serve on an international committee or serve on the international board or as an RTF Trustee |
| How to qualify | <ul style="list-style-type: none"> • A minimum of one (1) member within the division serves on an international committee or serves on the international board or as an RTF Trustee |
| Evidence to submit | <ul style="list-style-type: none"> • Serve on an international committee – letter or email or certificate of appreciation from the chair of the committee • Serve on the international board – letter or email or certificate from the International Board or copy of a letter from the member on board letterhead showing the member’s name in the board list or copy of a letter from the international board member above the member’s formal signature block • Serve as an RTF Trustee – letter or email or certificate of appreciation from chair |

DoE Category - #11: Leadership Development and Roles

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|---------------------------|---|
| Criteria | President-elect attends the Incoming Division Presidents conference |
| How to qualify | <ul style="list-style-type: none"> • Incoming president attends the conference • In the event the incoming president is unable to attend, the division sends an appropriate alternate |
| Evidence to submit | <ul style="list-style-type: none"> • To be confirmed by HQ |

DoE Category - #12: Leadership Development and Roles

| | |
|---------------------------|--|
| Criteria | Send a delegate or submit a proxy to the International Education Forum and Annual Meeting (EFAM) |
| How to qualify | <ul style="list-style-type: none"> • Division sends a delegate to EFAM or assigns a proxy |
| Evidence to submit | <ul style="list-style-type: none"> • Provide one of the following <ul style="list-style-type: none"> ○ Copy of resignation form designating a delegate or ○ Copy of executed proxy |

DoE Category - #13: Programs and Participation

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|----------------------------|--|
| Criteria (“and/or”) | Submit a completed application for the Avery Chapter/Division Achievement Awards Program <u>and/or</u> submit a nomination in the Award of Excellence program |
| How to qualify | <ul style="list-style-type: none"> • Submit an application to the Avery program • Submit an application to the Award of Excellence Program |
| Evidence to submit | <ul style="list-style-type: none"> • Copy of application • HQ can confirm |

DoE Category - #14: Programs and Participation

| | |
|----------------------------|---|
| Criteria (“and/or”) | 60% of chapters submit a completed application for the Avery Chapter and Division Achievement Awards Program and/or the Award for Excellence Program |
| How to qualify | <ul style="list-style-type: none"> • Chapters submit an application to the Avery program and/or an application to the Award of Excellence Program |
| Evidence to submit | <ul style="list-style-type: none"> • Division surveys chapters and provides list of chapters who submitted applications • HQ will confirm submissions |

DoE Category - #15: Recruitment and Retention

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|---------------------------|---|
| Criteria | 90% of chapters within the division have a minimum of 15 members |
| How to qualify | <ul style="list-style-type: none"> • Division monitors monthly reports to ensure chapters maintain the appropriate membership numbers |
| Evidence to submit | <ul style="list-style-type: none"> • List of chapters and their membership totals that make up the 90% • HQ will confirm submission |

DoE Category - #16: Recruitment and Retention

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|---------------------------|--|
| Criteria | Sustain a net increase in membership of 8% |
| How to qualify | <ul style="list-style-type: none">• Division membership total increases by a minimum of 8% |
| Evidence to submit | <ul style="list-style-type: none">• Will be verified by HQ as of June 30 membership totals |

DoE Category - #17: Recruitment and Retention

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|---------------------------|--|
| Criteria (“and”) | Retain 90% of the chapters within the division and attain a membership retention rate of at least 75% |
| How to qualify | <ul style="list-style-type: none">• Division monitors monthly reports to monitor the information |
| Evidence to submit | <ul style="list-style-type: none">• HQ will confirm submission as of June 30 |

DoE Category - #18: Recruitment and Retention

| | |
|---------------------------|--|
| Criteria | Sustain an increase of at least one new IAAP professional chapter or one new student chapter |
| How to qualify | <ul style="list-style-type: none">• Division adds a new chapter(s) |
| Evidence to submit | <ul style="list-style-type: none">• HQ will confirm submission as of June 30 |

DoE Category - #19: Strategic Planning AND Marketing Research & Community Outreach

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|---------------------------|--|
| Criteria (“and”) | Establish a division business (strategic) plan; conduct a minimum of one business (strategic) planning session; and conduct a member interest/satisfaction survey |
| How to qualify | <ul style="list-style-type: none">• Division documents a Business (Strategic) Plan and ensures it is transferred to the new board at year end and is reviewed/updated by the new board as they begin their leadership year; plan is reviewed throughout the year as appropriate• Chapter conducts an annual survey of members |
| Evidence to submit | <ul style="list-style-type: none">• Provide <u>all</u> of the following:<ul style="list-style-type: none">○ Copy of Business Strategic Plan showing when it was last updated – if it is new, only current date is required○ Copy of brochure or agenda or minutes of event where strategic plan was reviewed○ Copy of the member survey, a dated copy of the email distributing the survey – or some evidence from the on-line service if used – and the results of the survey |