

International Association of
Administrative Professionals®

LEADERSHIP SKILLS

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Ohio Division

LEADERSHIP SKILLS

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What A Leader Is

Leadership is a relationship...it is a process, not a condition. Leaders are motivators and initiators, they seek information, opinions and support of others in the effort to reach a group consensus.

Leaders express their own opinions and must be prepared to support and discuss them.

Leadership is the ability to mobilize your resources. The mobilization and use of resources is the purpose of having leaders.

Leaders:

- Inspire greater activity among members or subordinates.
- Administer procedural matters.
- Build group cohesiveness (promote teamwork).
- Provide encouragement.
- Facilitate group task accomplishment.

Remember – being a leader is not defined by the position you hold, but by your actions, attitudes and the example you set. Every member is a leader in his or her own way.

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What is Leadership?

Vision	Leaders see the whole picture and articulate the broad perspective with others.
Trust	Without trust, vision becomes an empty slogan. Trust binds people together, creating a strong, resilient organization. To build trust, leaders are predictable, and they share information and power. Their goal is a culture of candor.
Loyalty	Loyalty is being faithful to duty. It is very important to being a good leader.
Participation	The energy of an organization is the participation and effort of its people. The leader's challenge is to unleash and focus the energy, inspiring people at every level to pitch in with their minds and hearts.
Learning	Leaders need a deep understanding of themselves. They must know their strengths and shortcomings, which require a lifelong process of discovery, and they must be able to adapt to new circumstances.
Diversity	Successful leaders know the power of diversity and the poison of prejudice. They understand their own biases, and they actively cultivate an appreciation of the positive aspects of people's differences. They insist on a culture of mutual respect.
Integrity	A leader must stand for something. Good leaders understand that good ethics is good business.
Community	Community is mutual commitment, and it inspires the highest performance. It's human nature to go the extra mile for one's neighbors and fellow citizens, and a mature leader stresses the organization's responsibility to the surrounding society.
Articulation	A good leader must be able to speak, think, and write clearly to ensure accurate and effective communication takes place. And we must remember that to have communication, the leader must be able to listen just as clearly.
Diplomacy	The leader must be able to remain tactful in uncomfortable situations and must be able to bridge the gaps and look at all sides of issues with an unbiased and logical approach.
Excellence	The good leader always strives to exceed the ordinary and lives the motto, "Do it right the first time." The leader's standard is the goal for the rest to attempt.
Responsibility	The good leader takes the criticisms as well as the rewards for his or her performance. When wrong, the leader answers with a plan of corrective action and not with excuses.
Solutions	Remember that there is nothing wrong with "I don't know, but I will find out."
Pride	Pride refers to proper respect for one's own worth. It must not be overextended to arrogance. No matter what the task, the good leader accomplishes it with pride. A good leader instills this sense of pride in the organization's members through example.

Ten Secrets of a Good Leader

1. Always start your business meetings on time. If you wait on others to start your meetings, you send the signal that it is OK to be late. IT'S NOT OK!
2. Ascertain that you have a quorum in accordance with your bylaws before starting your business meetings. You CANNOT legally conduct any association business without a quorum being present. Your local bylaws should state the number of members required being present to constitute a quorum for both regular and board business.
3. Request all board members and committee chairmen to have written reports in triplicate at each meeting (president, secretary, and chairman's file). These reports should be handed to you before you begin the business meeting. This will facilitate the efficiency of your meetings and assist the secretary while she is recording the minutes. (This should also eliminate any element of surprise.)
4. Appoint a Parliamentary Advisor. This person should be well versed in *Robert's Rules of Order Newly Revised* and in your Chapter, Division and International bylaws. Your Parliamentary Advisor should attend both the regular business meetings as well as your board meetings. Having a Parliamentary Advisor will keep your meeting from being sidetracked with unnecessary interruptions and keep your meetings on track.
5. When delegating responsibilities, make sure to give the party a deadline for completion and notification that you will follow up on each assignment. Make sure to follow up! Invite your members to ask questions and seek advice on how to achieve the goals you have set. You must let your members know exactly what is to be expected. Your goals cannot be achieved if your members don't know what they are.
6. Always remember that as your association's president, you do not have a vote. You should not take sides on any issue or voice your opinions on a particular subject. Your job is to ascertain the goals of the majority and see that they are accomplished by delegating to the appropriate parties and monitoring their progress.
7. As president, it is your responsibility to encourage member participation in any approved projects. Your board can set the tone by participating in the background and inviting others to take responsibility for the project. This allows the entire membership to share in the success of a completed project.
8. Remember to praise members for successfully completing projects and to give credit where it is due. Everyone loves to be praised and you can encourage further participation when you recognize members for their achievements.
9. Always keep a calendar of scheduled IAAP activities and events. Know the deadlines for sending in dues, award form packages and information updates to IAAP Headquarters, District or Division. Remember that promptness makes for success and hesitation leads to disaster and hurt feelings.
10. As president, you will always have two options in which to approach any given situation. You can be intimidating or you can be inviting. You will always make the RIGHT choice when you offer the receiver a gracious way to accept or decline your invitation.

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The ABC's of Effective Meeting Leadership

A	Always begin meetings on time.
B	Build agenda on overall objectives of organization.
C	Coordinate proper timing of program items.
D	Determine and adjourn the meeting at the scheduled time.
E	Entertain motions graciously, restating for clarity.
F	Follow up meeting with necessary implementation of action items/steps.
G	Give each person an opportunity to speak.
H	Handle conflicting views and opinions graciously.
I	Inform participants of the agenda to facilitate their preparation.
J	Justify any unusual demands or special requests.
K	Know the general characteristics of participants.
L	Learn about any visual aides needed by program participants.
M	Move meeting along by conforming to the time limits in the agenda.
N	Notify in advance those who will participate in a special capacity.
O	Organize with a checklist of all tasks to do before meeting.
P	Provide hosts with information necessary for physical arrangements.
Q	Questions are important; answer them or refer to a resource.
R	Respect the importance of information with printed handouts.
S	Stimulate enthusiasm by careful pre-meeting planning.
T	Time the arrival of guests and speakers in keeping with agenda.
U	Understand and analyze purpose of meeting.
V	Visualize details, and delegate to members for good coordination.
W	Welcome suggestions for improvement.
X	'Xpect unknown factors and make allowances for the unexpected.
Y	YOU are the one, primarily responsible for good meetings.
Z	Zest – that enthusiasm an effective leader gives to meetings.

Enhancing Your Leadership Skills

Understanding Mutual Rewards

It's hard to share the limelight. Sometimes we may feel that we get so little recognition from our family, co-workers, supervisors or fellow association members for the hard work we do that we are tempted to keep to ourselves, any "pat on the back" that might come our way, regardless of whether we can truly claim full credit for the achievement.

However, it is a leader's responsibility to make sure that those who do the work get the credit. If they don't, are those workers or association members or family members likely to exert themselves again the next time a similar situation should arise?

Perhaps we should also reconsider our definition of "providing recognition." We must not relegate that activity to a once-a-year awards banquet. It should be an ongoing exercise. Surely some association member has done something worth recognizing at every meeting! And, between meetings, a call or note from an officer to express thanks for a job well done can do much toward reviving flagging spirits.

Listening Attitudes

Did you know that listening accounts for more than one-half of communication? Are you a good listener? How will you rate when answering these questions?

About your listening attitudes:

- Do you listen to other people talk?
- Do you encourage other people to talk?
- Do you listen, even if you don't like the person who is talking?
- Do you listen equally well, whether the person is a man/woman...young/old?
- Do you listen equally well to friends, acquaintances, or strangers?

About the way you listen:

- Do you look at the person talking to you?
- Do you put what you are doing out of sight, out of mind?
- Do you ignore distractions?
- Do you smile, nod your head and encourage the person to talk?
- Do you think about what the person is saying?
- Do you try to understand what the person means?
- Do you try to understand why the person is saying it?
- Do you let the person finish what they are saying?

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- Do you restate what has been said, asking if you got it right?
- Do you withhold judgment about ideas until the person is finished?
- Do you listen regardless of a person's speaking manner and choice of words?
- Do you listen though you anticipate what the person is going to say?
- Would your followers describe you as a good listener?

Qualities of a Good Goal

- Goals must be realistic. Wishful thinking is not realistic. In most cases, goals are not achieved because people have difficulty accepting them. Goals must be something you can imagine accepting, something that is not beyond the realm of possibility, and something you can believe in.
- Goals must be specific. Generalized goals are difficult to deal with. The second most common reason goals are not achieved is because they are vague.
- Goals must be worthwhile. It must be something we are willing to work for.
- Goals must be achievable. Set goals that you can achieve, goals that you know are reachable. They should require you to reach a little higher and stretch a little further than usual. Making them attainable does not mean making them easier.
- Goals must be measurable. You should be able to measure how you are doing, when you get there and the degree to which you achieved the goal.
- Goals must be controllable. Too often, we fail to reach our goals because we don't have, or can't influence the activities that make the difference between failure and success. A reasonable amount of control must exist with you.
- Goals must have a target date. Not only must you give a date of completion of your goals; you must include dates that will enable you to check on the progress toward your goals. This makes it difficult to procrastinate.
- Goals must be personal. You will achieve goals only if there is something in it for you.
- Goals should be compatible. Each of your goals should be compatible with each other. If you set two incompatible goals, you have already ensured that you will fail at one or the other.
- Prioritize your goals. You may not be able to pursue all of them at once, so choose which are the most important to you.

Image Builders

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- Giving and taking criticism effectively.
- Collaborating with your team members without fear of competition.
- Using your personal power and communication skills to obtain your goals.
- Assessing and dealing with individuals – sensitivity to others' ideas and needs.
- Knowing and accepting priorities and limitations, empowering others, managing stress.
- Showing mortification and self-reliance. Speaking up and disagreeing when necessary.
- Proaction, initiating and seeking the challenge of the untried.
- Managing conflicts effectively.

Team Building

Building a Winning Team

What is a Team?

A team is a collection of individuals guided by a common purpose striving for the same results. Because each member makes a unique contribution, a team represents a powerhouse of potential.

Building a team can achieve dynamic results for an organization. It can also bring out the best in others and solve problems.

Teamwork requires many important qualities – cooperation, trust, open communication and creativity.

Uniting a Team

A team brings together people of diverse experiences, skills, personalities and backgrounds. Managing a diverse group, particularly one that contains individuals with strong or abrasive personalities, can be broken into three key steps:

- Identify basic psychological/emotional needs that are common to all team members.
 - The need to contribute to the project.
 - The need to feel competent.
 - The need to achieve results.
 - The need to have their efforts recognized and rewarded.
- Establish limits and ground rules that will help you manage future problems.
 - Deadlines.
 - Measurable goals/objectives.
 - Clearly stated expectations.
 - Limits imposed by responsibilities.
 - How information will be communicated.
 - What information will be communicated.

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- The Synergy of a Team.
 - Establish a bond among team members by creating a shared goal.
 - Highlight common experiences. Look for common ground you can use to build unity.
 - Project a positive attitude. Regardless of inner feelings or opinions, look for the positive side and communicate this to all team members.
 - Communicate consistently, clearly and in a timely manner. Poor communication will undermine even the most enthusiastic team's efforts.
 - Treat all team members with respect. Make sure you don't have any biases, ill feelings or other negative preconceived attitudes about individual team members.

Be a Professional

Proud of your profession.

Respected by those you interact with.

Organized -- you know the exact status of your project(s).

Forthright -- you are sincere, open, and honest.

Educated -- you continue to build technical and interpersonal skills.

Successful in your role as an office professional.

Savvy -- your practical know-how is always a plus.

Impressive to others.

Open to new ideas and change.

Noticed because of your excellence.

Adventuresome -- you are not afraid to take risks.

Listened to because you know what you're talking about.

Officers & Chairs

So You've been Elected an Officer

If you are an officer, you will....

Study parliamentary procedure so you will be able to take over the chair at any time (sudden illness, or a motion involving the other officers might cause them to give up their position of chairman at a moment's notice). If you know what to do, your sudden promotion will be much less shocking and you will be proud that you could successfully step into the position of chairman.

Realize that you are an *Ambassador of the Association*. Never become so involved in filling your office that you forget the members of the association elected you. In other words, don't let the title go to your head. A friendly, courteous attitude must be part of the attire of every officer.

Be able to keep a secret. If you are on the "inside track", that doesn't give you the right to discuss matters with your personal friends when other members haven't had the opportunity to receive the information on this particular issue. Be a "confidential secretary" type of officer and let the President make the announcements to the group as a whole, rather than trying to combat the evils which can arise when only a minority is informed of approaching activities or problems.

Cooperate with the other officers and work with them on the Executive Board. Remember that you are a member of the team. Don't become so involved in your own duties, that you don't have time to be friendly with all the association members.

Because of the above, care should be used in selecting a Nominating Committee, and, in turn, the responsibility placed on them in selecting officer material. They should remember that there are members who would be excellent in one position, but would not function well in another position. In discussing this matter with the members prior to establishing the nominating slate, the duties and requirements of the position should be enumerated to the potential candidate so she/he can accurately determine whether or not she/he is in a position to perform the duties as required if she/he is elected.

Remember that the association bylaws set out the duties of all officers. Therefore, all officers should familiarize themselves with the bylaws and keep a calendar of events as they occur.

So You've been Appointed a Committee Chairman

You'll have something to be proud of if you:

- Gain the true friendship and respect of the other members of your committee.
- Help guide your association along the right road to elevate the standards of your profession.
- Attain the respect of your community for your association.
- Enjoy the satisfaction of having helped in a job well done.
- Profit from working in harmony with others who share your objectives.
- Build confidence in your own ideas and your ability to present them for consideration.
- Realize there are more ways than one to bring a project to a successful conclusion.
- Learn to respect the ideas of others and accept gracefully the wishes of the group to follow a plan other than the one dear to your heart.
- Learn the value of deterring all the facts before you pass judgment.

Public Relations – Ten Commandments

1. Speak to people. There is nothing as nice as a cheerful word of greeting or encouragement.
2. Smile at people. It takes 72 muscles to frown and only 14 muscles to smile.
3. Call people by name. The sweetest music to anyone's ears is the sound of their own name.
4. Be friendly and helpful. If you would have friends, be friendly.
5. Be cordial. Speak and act as if everything you do is a genuine pleasure.
6. Be interested in people. You can like almost everybody, if you try.
7. Praise people. Be generous with praise, cautious with criticism.
8. Be considerate. There are usually three sides to every controversy: yours, the other fellows, and the right one.
9. Give service. What counts most in life is what we do for others.
10. Add to the above. A good sense of humor, a big dose of patience, a dash of humility and you will be rewarded!

Developing Management Skills

Understanding Power

Power is something many people, especially women, feel uncomfortable about discussing. It is spoken about in hushed tones, almost as if it were something "nasty" or taboo, and certainly unladylike. We don't seem to want to admit that it exists or, heaven forbid, that we might want it.

But *power is a fact of leadership*, and a true leader must learn to use it in productive and effective ways.

It is important to note that *power resides in the position, not the person*. As president of your association, you may have a certain power, due to the information, privileges and responsibility that accrue to that office. But, when you leave the office, that information, those privileges and that responsibility do not go with you. They remain with the presidency and are invested in your successor.

It is true that some people seem innately "powerful," regardless of the position or situation in which they find themselves. But a true leader understands that she/he does not "own" power, she/he simply borrows it from her/his position for as long as she/he holds that position.

Mentoring

The mentor is a wise and trusted friend who guides the personal and professional development of another individual.

The mentor is understanding and motivating -- enhancing the individual's vision of accomplishment.

The Mentor:

- Boosts Self-Esteem.
 - Believes in the individual.
 - Renews self-confidence.
 - Reflects confidence in the individual to others.

- Understands the individual's dream and enhances the individual's vision.
 - Believes the individual's dream is worthwhile.
 - Helps the individual expand his/her horizons; offers a challenge.
 - Encourages the individual to have a "THINK BIG" perspective.
 - Helps the individual plan action to achieve aspirations.

- Supports the individual's educational and career goals.
 - Espouses the individual to career professionals.

- Introduces the individual to the educational or business structure.
 - Teaches the individual the language of the academic or business community.
 - Shares the philosophy and values of the workplace.
 - Offers advise on developing and using a network of contacts within the workforce.

- Provides Advice, Counsel, and Support.
 - Encourages the individual to achieve the goals they have established.
 - Provides perspective on how others see the individual.
 - Gives the individual opportunities to assume additional responsibilities.

- Acts as a Role Model.
 - Exemplifies professional ethics and behavior.
 - Stresses the value of confidentiality.
 - Displays ethnic and cultural pride.
 - Expresses a positive attitude.

Remember – your goal is not to produce a copy of yourself – it's taking the journey that makes the difference!

Delegating

The Delegation Dilemma

How many times have you heard "Nobody can do it better than I can?" Or "If I want it done right, I might as well do it myself."

People learn from watching and from making mistakes...be there to support them and to guide them, but DO NOT do it for them.

Outline your expectations, give them the tools to do the job, and follow up, follow up, follow up. Remember to FOLLOW UP.

You must delegate and allow others to have the responsibility to complete tasks, which meet the expectations of your association. This means:

- That intelligent delegation is more important than the actual work you do yourself.
- That building good relationships with your officers and committee chairmen help motivate them to do the work that needs to be done.
- That it's nice to have people like you, but respect is much more important.
- That knowledge gives you power and when you share it, you earn respect. Teach those that work with you everything you know to help them become more efficient.
- That you must set a good example. It's OK to pitch in and help from time to time, but don't overdo it. Your skills as a delegator are much more valuable.
- That you must create an efficient and relaxed working climate. Human nature says that people make mistakes and produce less when watched too closely.
- That you must give credit freely when it is due.

Guidelines for Delegating

- Accept delegation. Delegation is necessary for a successful team. Even if things aren't done exactly as you would do them, you must be willing to accept another's methods. You can only direct, you cannot do the task for them.
- Specify goals and objectives. Team members must know not only what is to be done, but why, how well, by whom, within what time frame and according to what priority.
- Know the capabilities and interests of your team members. You must be able to match tasks with the members' abilities and resources.
- Include training. If members need certain criteria or skills to participate, you must be willing to train them and provide them with the proper tools for doing the task.

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- Take an interest. Team members must know that their contribution is important to you and the team. Their efforts must be noticed and rewarded.
- Assess results. Let the team know if progress is going as you planned and if results are as expected. Here is where you can share the praise and criticisms of the project using tact and good judgment.
- Don't snatch back the delegated task. Making mistakes, finding out about them and correcting them is a valuable learning experience. You may have to offer assistance, but don't take over the task.
- Share the team's accomplishments with others. The successful team deserves recognition.

Problem Solving – Seven Steps

1. Define the problem. This is perhaps the most difficult and certainly the most critical step in the process. We must be willing to probe and dig to find the real problems that are not always apparent. We must identify the basic cause to define the problem.
2. Collect the pertinent data. The collection of pertinent material is not an easy task. The rewards of doing a capable job in this step far exceed the time required. This is a most critical step and should not be underestimated.
3. Determine all possible solutions. The main objective of this step is to train yourself to come up with as many solutions as possible. Remember that you can never use or reject a possible solution you never gave yourself time to think of.
4. Analyze and evaluate alternatives. Now is the time for testing and questioning the alternatives to find out how they "fit" the problem at hand. Draw on experience, education, judgment, knowledge, etc. to explore the suitability of each alternative. It is important that every alternative be subjected to this scrutiny.
5. Select the best alternative(s). It is this step which pinpoints the action that is taken. It is here that we decide which course of action is the most appropriate in solving our problem.
6. Implement action decided upon. All of the previous action has led us to this point. Unless we take this step, the problem will remain and all of our efforts will have been for nothing.
7. Follow up to be sure action is carried out. We must follow up to make sure that the action was implemented in the manner intended. The follow up phase determines whether or not the problem will stay solved.

Resolving Conflict – A Five-Step Strategy

1. Explore the other person's position. Listen to the other side without becoming emotional, defensive or judgmental. After the other person explains her/his position, repeat what you think you've heard and have the other person confirm whether you heard correctly.
2. State your own position calmly and patiently. Then have the other person express her/his understanding of what you have said. Confirm if correct, and clarify if incorrect.
3. Create a statement of the problem together. Determine the nature of the conflict. At this point, you may find the conflict is only a simple misunderstanding that can be cleared up immediately. If conflict does exist, determine the area. If, for example, the conflict involves facts and information, the problem may simply be one of interpretation. Misunderstanding involving methods and procedures is also usually relatively easy to resolve. Conflicts involving values and beliefs, however, may require more serious effort. Work with the other person to create an accurate and comprehensive statement of the problem that addresses both your needs.
4. Generate alternatives. Try to work with the other person to generate alternative solutions. Sometimes two people can spark each other's creativity. Withhold criticism and generate as many alternatives as you can. Don't object if some of them seem crazy or far out. Some of the best ideas in the business today seemed bizarre when first introduced.
5. Select a solution and agree on an action plan. Ask the other person which alternatives she/he likes best, then express your own preference. If you have at least one alternative in common, the decision is simplified. Develop an action plan to ensure the agreed-upon solution is carried out. Together decide who will do what, where and when.

You as the Delegate

As a delegate you represent your Chapter/Division and usually part of your expenses are paid by the unit. This is a *quasi-contractual relationship* – you agree to go as a delegate and your unit agrees to assume part of your expenses, you owe the unit certain duties, for you have assumed the responsibility of representing them at the meeting.

The duties of a delegate extend over three periods of time: Before, During and After the meeting.

- While it is impossible to enumerate those things that should be done before the meeting, these are of paramount importance:
 - Study the CALL to the meeting, which includes the most important business to be transacted, proposed amendments to the bylaws and such other business as the bylaws make mandatory.
 - Discuss with your Chapter the names presented by the nominating committee, for you do not necessarily vote your personal choice. If your unit endorses a nominee, you are honor-bound to give that nominee your most careful attention; and if instructed to vote for a specific nominee, it is your duty to carry out the wishes of your unit. The hands of a delegate should not be tied, but the delegate should be allowed to vote for the person who would, in the delegate's estimation, best serve the organization.
 - Take to the meeting your copy of the International, Division, and Chapter Bylaws and Standing Rules, your membership card, the receipt for your registration, and a notebook. Write it down – don't try to recall the facts.

- During the meeting:
 - Register promptly.
 - Attend all meetings – remember your obligation and be on time.
 - Read and observe the meeting's Standing Rules.
 - Vote with your unit's viewpoint in mind and do not forget to consider the good of the organization.
 - Take part courteously in the discussion.

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- After the meeting:
 - Prepare a report to be given to your unit.
 - Give a full report of the actions taken by the Convention and include a brief statement of the reason for the action.
 - Report in detail amendments to the bylaws and be sure to state the final decision on each – did it pass or fail?
 - Give the gist of the speeches or discussions.
 - Give a summary of workshops and panels.
 - Give a thumbnail sketch of the social activities.

Responsibilities of Delegates and Alternates

Voting Privileges

Each Chapter is entitled to one vote (one delegate) at an IAAP division meeting, district conference or international convention (hereafter referred to as "meeting"). Each Chapter is also entitled to select one alternate to take the place of the delegate should it become necessary. It is just as important for the alternate to attend business meetings as it is for the delegate.

Before the Meeting:

- Each Chapter President will receive the credentials form, which she/he must complete, indicating the name of the delegate and alternate.
- These forms must be completed in duplicate and then handled according to the instructions on the form.

Rights and Responsibilities

Doing Homework:

Well before arriving at the meeting, delegates and alternates should have acquainted themselves with the issues and proposed changes that will be coming before the assembly for vote. They should:

- Find out everything they can about the proposals.
- Expose themselves to all sides of the issue in order to make the best possible decision when they vote.

Above all, they should be aware of the opinion of their Chapter on the issues. They are representing their Chapter and their vote should express the wishes and best interests of that Chapter.

Being Instructed:

Some Chapters exercise their right to send their delegate and alternate to the meeting *instructed* on how to vote on some or all of the issues. However, if the delegate is sent instructed by the Chapter, it should be with the proviso that they may change their vote if new or different information presented at the meeting calls for reevaluation of the issue. The Chapter may

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include a proviso at the time of the instruction granting the delegate that authority, but also requiring that the delegate provide justification for the change in their post-meeting report to the Chapter. This proviso will allow the delegate flexibility to make an alternative decision if they feel confident their Chapter would have felt differently on the issue had they had access to this information originally.

An instructed delegate whose instructions do *not* include such a proviso is *obligated* to vote as her/his Chapter instructed. This only applies, however, to the amendment as proposed. Should the proposed amendment be changed in any way on the floor, the instructions do not apply and the delegate should vote according to her/his judgment on the changed amendment.

At the Meeting

Upon Arrival:

Both the delegate and the alternate should check in at the credentials desk to be certified. If at all possible, they should do so at the same time. This check-in process is a **MUST**; they **CANNOT** vote until they have certified at the credentials desk before the business meeting.

Attendance:

Delegates and alternates should make every effort to attend any and all workshops or briefings that may be offered for the delegates' benefit. These briefings may provide new or revised information about the issues, which may affect the vote.

Speaking Out:

If a delegate or her/his association feels strongly about a particular issue, the delegate should voice her/his reasons at the delegates' briefing and business session. This may bring out points of information of which other delegates were not aware, and can be especially important on a controversial issue.

In order to voice an opinion at the meeting, the delegate should:

- Proceed to the microphone.
- Wait to be recognized.
- Address the presiding officer as "Madam President" or "Madam Chairman".
- Give her/his name and Chapter so that the Secretary will have no difficulty in recording the correct name in the minutes and so that the presiding officer may repeat the name and formally grant the floor to the member:

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Tips for the Delegate and Alternate:

- Be on time and pay attention.
- Address all remarks to the Chair:
 - Don't repeat points, which have already been made.
 - Discuss motions. Express an opinion.
 - Talk loudly and clearly so that your remarks will not have to be repeated.
 - Discuss only the issue on the floor; don't introduce other topics.
- Vote on all motions:
 - Know what you are voting on. Ask questions if anything is unclear.
 - If discussion becomes repetitious and time is short, you may stop debate by calling for the question.
 - Don't let personal feelings intervene. Vote for what is best for your Chapter.

Amendment Information:

- An amendment is in order as soon as the question has been stated by the Chair and anytime during debate.
- An amendment must be related to the motion being considered.
- A motion may have a primary, or main, amendment and secondary amendment pending at the same time.
- The secondary amendment must be an amendment to the primary amendment.
- A motion cannot be amended in two different places at the same time (for example, striking out words in one place and inserting them in another), but when one amendment has been voted on, the other may be made.
- Only two amendments may be pending at one time, and the second must be related to the first.
- If you wish to offer an amendment, which is not in order at that time, you may give notice of your intention by saying, "If this amendment is defeated, I will make the following amendment."
- A proposed bylaw amendment is a main motion and requires two-thirds vote unless the bylaws state otherwise. An amendment to a proposed bylaw amendment is a secondary motion and requires only a majority vote.
- Ordinarily, it takes two-thirds vote to change or rescind anything already adopted.
- An amendment is debatable if the main motion is debatable.

Summary:

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To summarize, the responsibility of serving as a delegate or alternate is not to be taken lightly. The delegate's vote should reflect his/her Chapter's wishes. Thought and consideration should be given to any vote cast. The Chapter is counting on its delegate's judgment.

Members

Duties of a Member

A good member:

- Attends meetings regularly.
- Takes an active part in Chapter business meetings by:
 - Arriving on time.
 - Staying until the conclusion of the meeting.
 - Being knowledgeable of items to be presented for action.
 - Taking a constructive part in discussions.
 - Asking questions that are pertinent to the discussion.
 - Voting on all questions.
 - Voting at elections.
- Is familiar with Bylaws and International Procedures, and Chapter and Division Bylaws and Standing Rules.
- Knows the rudiments of parliamentary procedure.
- Permits name to be placed in nomination as Chapter officer when requested and if at all possible.
- Accepts appointment as committee chair or committee member whenever possible.
- Takes an active part in Division and International structure (such as committee participation, nomination for office, etc.) when requested and if possible.
- Reads all Chapter, Division and Association publications and mailings.
- Makes an effort to become acquainted with new members and to be friendly with all members.
- Has the responsibility to:
 - Represent IAAP before others in the best possible manner.
 - Be informed on IAAP activities.
 - Inspire loyalty to IAAP's aims and purposes.
 - Encourage qualified administrative professionals to become members of IAAP.

Decorum for Members

A member:

- Gives full attention to Chair on rap of gavel.
- Addresses Chair to gain recognition.
- Obtains floor before addressing assembly – except in dire emergency.
- Willingly observes all rules of debate.
- Confines remarks to merit of pending question.
- Refrains from attacking motives of others.
- Addresses all remarks through the Chair (no cross talk).
- Avoids use of members' names in debate.
- Refrains from speaking about actions or matters not actually or officially before the assembly.
- Does not read from book or make lengthy quotation without permission of assembly.
- Never speaks against own motion.
- Refrains from calling out a motion to "Adjourn" or "Question" when another has the floor.
- Makes no efforts to "explain vote" during voting.
- Abstains from voting on a question of direct personal interest.
- Obeys all legitimate orders of the presiding officer.
- Avoids walking between Chair and assembly.
- Refrains from disturbing assembly and presiding officer through whispering and restless behavior.
- Takes seat when the floor is assigned to another.
- Accepts appointments and carries out assignments graciously – or formally requests permission to be excused from the duty.

President / President-Elect / Vice President

Preparation for Your Office

You can do several things to prepare yourself for being the competent President, President-Elect, and Vice President every Chapter needs:

- Study the Bylaws – especially those of your Chapter, Division and International.
- Study the Association Handbook – it will help you relate your work to that of the other officers.
- Attend your Division Officer Training Session – you will have the opportunity to meet the Presidents, President-Elects, and Vice Presidents of other Chapters and to share ideas and concerns.

Qualities Needed

You will need a number of qualities, some will be acquired as your term progresses, but here are some essentials:

- You must be INFORMED – Chapter members will expect you to know all the answers in IAAP. Become familiar with the location of all types of information so you can find your reference in a hurry when you need it.
- You must be APPROACHABLE – to be approachable, you must be easy to contact and, in turn, be able to contact members easily.
- You must be UNFLAPPABLE – this is simply a basic rule of good leadership, but holding a Chapter office will give you more opportunity to practice it.
- You should remain UNRUFFLED – many members will apparently not appreciate your hard work while taking your efficiency for granted.
- You must CHERISH THE MEMBERS – they are the lifeblood of our organization. Treat each one as an important and necessary part of our organization.

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President

The President is the leader of the Chapter. It is the duty of the President to preside at all meetings, to appoint committees, to serve as chairman of the Chapter board of directors, and to perform any other duties required by Chapter bylaws. It is the duty of all Chapter officers to uphold and represent the interests of IAAP and the profession as a whole.

At least in the public eye, a President carries the major responsibility for the success, effectiveness, and reputation of an organization. A capable President must, therefore, be a JACK-OF-ALLTRADES AND A MASTER OF ONE – the ability to get along with people. Knowledge of basic parliamentary principles and how to apply them is of course important, but this can be acquired.

The role of a President is generally twofold – a presiding officer and an administrator. Upon election, you should make certain that you have a practical understanding of the objectives, policies, traditions, and goals of the Chapter and/or association. You should become very familiar with the bylaws and standing rules and be satisfied to work within the limitations set by them. You must also become acquainted with the "job descriptions" under which your fellow officers and chairmen will work, and be prepared to supervise and assist them.

As the presiding officer, through the manner in which you have planned and then conducted a meeting, the President sets an example for the assembly in fairness, courtesy, and operation under rules. You always keep in mind that parliamentary procedure is based on:

- Courtesy to all.
- One item at a time.
- Majority rule with respect for the rights of the minority.
- Justice for all and partiality for none.

A meeting is planned through preparation of an agenda. After consulting with members of the executive board and especially with the Secretary, the President plans how the meeting is to be organized and conducted. The agenda must follow an accepted order of business, which is generally included in the standing rules and usually provides for:

- Call to order.
- Reading and/or approval of minutes.
- State of Treasurer.
- Reading of communications.
- Reports and their disposal.
- Unfinished business.
- New business.
- Announcements.

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- Adjournment.
- Program.

On the day of the meeting, the presiding officer should make certain that all arrangements have been made for comfort and efficient operation. Details of arrangements should, of course, be carried out by the proper committees, but the wise President will want to make certain that a table and chairs are set up, that any lectern provided is of comfortable height, and that the microphone works. In fact, it is a good idea for the President to practice using the microphone before the meeting begins so a comfort level is achieved.

Etiquette of the presiding officer is critical to the success of the meeting. Except in a very small assembly such as a board or committee, the presiding officer should rise when stating a motion and putting a question to a vote. You should also rise when speaking on an appeal or in defense of the response for a ruling on a point or order. During debate, you remain seated and pay attention to the speaker.

While presiding, the President represents and acts for the assembly not as an individual member; you should always remain impartial and refer to yourself impersonally. Instead of saying "I", say "the chair" or "your President". You state "the chair's decision," not "my decision" and refer to "the board," not to "my board". Personalities should never enter into a formal business meeting. The term "chair" is used as a symbol of impersonal authority.

While the presiding officer is duty-bound to inform and explain to the assembly, you should refrain from expressing your own opinions on pending questions. On rare occasions, when you believe your obligation as a member outweighs your duty as a presiding officer, you may relinquish the chair to participate in debate and on such occasions you should call upon the President-Elect or Vice President to assume the chair temporarily. When you step down, you must follow the same rules of procedure as any other individual member of the assembly and cannot resume your position in the chair until disposition of the pending motion is completed. A good presiding officer remains completely impartial at all times.

You vacate the chair whenever a motion is made that refers only to you, or commends or censures you along with others. You should not, however, hesitate to preside during consideration of a motion to elect officers or appoint delegates or committees, even if you are included among them.

Whenever the vote is by ballot, you vote. In all other cases, the presiding officer can (but is not obligated to) vote whenever your vote will affect the result (i.e., you can vote either to break or cause a tie; or to cause or prevent the attainment of a two-thirds vote).

LEADERSHIP SKILLS

President-Elect

The President-Elect is the assistant to the President. It is the duty of the President-Elect to assist the President in the administration of the affairs of the Chapter, perform the normal duties pertaining to the office of President-Elect, and any other duties prescribed by Chapter bylaws. The President-Elect must be ready at any time to assume the duties of the president should there be a vacancy. It is the duty of all Chapter officers to uphold and represent the interests of IAAP and the profession as a whole.

Vice President

The Vice President is the assistant to the President and President-Elect. It is the duty of the Vice President to assist the President and President-Elect in the administration of the affairs of the Chapter, perform the normal duties pertaining to the office of Vice President, and any other duties prescribed by Chapter bylaws. The Vice President must be ready at any time to assume the duties of the President-Elect or President should there be a vacancy. It is the duty of all Chapter officers to uphold and represent the interests of IAAP and the profession as a whole.

Decorum for the Presiding Officer

A Presiding Officer

- Is always courteous and diplomatic; remains impersonal in attitude and remarks.
- Presides impartially, speaking slowly and clearly so all may understand.
- Refers to himself as "the chair" or as "your President," avoiding the use of the first person pronoun.
- Uses the third person in calling for reports or motions. "The next business in order is the report of the ... committee."
- Refers to a member as "the member" – using a member's name only when absolutely necessary, except in small, informal meetings.
- Leaves the chair when she/he wishes to debate, except at board and committee meetings.
- Remains in the chair throughout a meeting; never "turns the meeting over" to another, e.g., to the program committee for presentation of a program.
- Asks the President-Elect to preside when a motion concerning the President personally is on the floor.
- May ask, "What is the members' pleasure?" or, "Is there a motion to ...?" when members fail to respond to a situation.

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- Courteously suggests a proper motion when a member makes a technical mistake.
- Assists with proper wording of a motion when a member has difficulty with phrasing.
- Suggests circumstance under which a motion may be in order after a member has made a motion at an improper time.
- Rules an improper motion "out of order" or "not in order at this time." The member should never be ruled out of order for having made the motion.
- Is kind but firm in making rulings.
- Is professional in handling points of order and appeals.
- Does not call for a negative vote on courtesy resolutions unless assembly insists.
- Consults quietly and unobtrusively with the Parliamentary Advisor when advice is needed or requested.
- For the sake of clarity, sometimes asks the Parliamentary Advisor to explain or interpret a point to the assembly.

Using the Gavel Prudently

- To call meeting to order: one rap.
- To preserve order: one rap, more only if obviously necessary.
- To adjourn meeting; one rap.
- Presents gavel to a chairman protem or a newly installed officer as the occasion demands.

Display of the Flag of the United States of America

- When displayed either horizontally or vertically against a wall, the union should be uppermost and to the flag's own right, that is, to the observer's left.
- When used on a speaker's platform, the flag, if displayed flat, should be displayed above and behind the speaker.
- When displayed from a staff in a church or public auditorium, the flag of the United States of America should hold the position of superior prominence, in advance of the audience, and in the position of honor at the clergyman's or speaker's right as he faces the audience. Any other flag so displayed should be placed on the left of the clergyman or speaker or to the right of the audience.

Duties of the Presiding Officer

- Open the meeting at the appointed time by taking the chair and calling the meeting to order having ascertained that a quorum is present.
- Announce the business to come before the assembly in accordance with the prescribed order of business.
- Recognize members who are entitled to the floor.
- State and put to vote all questions that legitimately come before the assembly as motions; announce the result of each vote; and, if a motion is not in order, rule it out of order.
- Protect the assembly from obviously frivolous or dilatory motions by refusing to recognize them.
- Enforce the rules relating to debate and enforce order and decorum within the assembly.
- Expedite business in every way compatible with the rights of members.
- Decide all questions of order unless you prefer to submit such a question to the assembly for decision.
- Respond to inquiries of members relating to parliamentary procedure or factual information relating to the business of the assembly.
- Declare the meeting adjourned when the assembly so votes or at any time in the event of an emergency affecting the safety of those present.

The Presiding Officer Has Available

- An agenda containing the complete order of business and listing all known matters that will arise under heading in their proper sequence (sometimes script agenda).
- A copy of the bylaws and other rules of the assembly.
- A copy of the parliamentary authority; i.e., *Roberts Rules of Order Newly Revised*.
- A list of all standing and special committees and their members.

Your Meeting Checklist

Even though the meeting and program are well planned and responsibilities assigned in advance, it is a good idea to have a checklist to avoid omission of some detail. The chairman should arrive early and approve the general arrangements of the room for appearance and comfort and check such items as:

- IAAP Banner.

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- Public address system.
- Microphone.
- Speaker table setup.
- Placards (names on front and back).
- Podium and/or lectern.
- Special props for program or speaker.
- Arrangements for installation of officers and/or welcome to new members.
- Distribution of any special materials.
- Persons assigned to host guests, speakers, etc.
- New members' pins, etc.
- Any special seating arrangements.

Tools of the Trade

Each President has certain tools of the trade. Copies of the following are at your disposal and should be consulted regularly. These are listed in random order and not ranged by importance:

- International, Division, and Chapter Bylaws and Standing Rules
- *Robert's Rules of Order Newly Revised*
- IAAP Leadership Portfolio for Chapter Officers (available from Headquarters)
- IAAP International Directory
- IAAP Materials Order Form
- Russell-Hampton Catalog
- CPS/CAP Capstone
- Membership Brochures and Applications
- CPS/CAP Brochures for Management
- Code of Ethics
- Gavel
- IAAP Banner
- *OfficePro*
- *Bits & Bytes*

Meeting Room Facilities and Supplies

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As soon as a date for the meeting has been determined, a meeting room must be selected. Most companies have conference rooms available for small meetings of company personnel. For large meetings, an off-site area may be selected. This may entail reserving a ballroom in a hotel or teleconference rooms in a number of cities. In selecting a meeting site, several factors must be considered:

- Size of group and purpose of meeting.
- Budget.
- Ambiance, acoustics, privacy.
- Ventilation.
- Support services (i.e., catering, audiovisual equipment).
- Dependability of service.

Once a meeting room has been selected, you must determine how the room is to be set up. There are numerous arrangements to select from, depending on the number of people participating and the size of the room itself. Common room setups include:

- Theater Style: Suitable for taking notes; designed for lecture presentation and/or audiovisuals; speaker is visible, on raised platform.
- Classroom Style: Suitable for taking notes; works well with long, narrow room; attention directed to speaker.
- Boardroom Style: Good for small groups; communication facilitated; formal setting.
- U-Shape Style: Allows speaker access to each participant; good for medium-size group; promotes interaction.
- T-Shape Style: Good for panel discussion; accommodates small groups.
- Roundtable Style: Informal; prompts discussion; good for small group work.

Meeting room facilities should be checked for lighting, heating, and ventilation. Microphones, slide projectors, computers, overhead projectors, multimedia equipment, video machines, screens, and the like need to be properly set up and working. During the meeting, be sure to provide enough memo pads, pencils, water and glasses. If coffee or tea is to be served, check your supplies and equipment (if the meeting is held at the company's facilities) or arrange for them to be served by someone else.

How to Conduct a Meeting

- Prepare an agenda with copies for the Recording Secretary and Parliamentary Advisor.

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- Be prepared to handle the discussion on topics that will be presented. Know if a ballot vote will be necessary; if heavy debate is expected; special guests in attendance; etc.
- Arrive at the meeting location early in order to check on the setup of the facility, test the microphone, organize the meeting materials, answer questions and greet attendees.
- Begin on time.
- Stand when addressing the group and speak to the group as a whole.
- Follow the agenda and maintain control over the time allotted for each topic.
- Maintain objectivity. Be fair and impartial.
- Help expedite business by aiding members who are having difficulty in wording motions or knowing what is proper procedure for handling business.
- Do not allow interruptions and do not allow discussion to wander from the subject.
- At the end of discussion or debate, restate the conclusions reached, action taken, etc.
- Conclude on time.
- Remember to thank any speakers or program presenters and remain after the meeting to thank others for their special contributions.

Agenda

An agenda is a list of all matters to be brought up at the meeting. Agendas vary with the type of meeting. Informal meeting agendas simply list the items to be discussed during the meeting. Formal meeting agenda details times, events, speakers, and locations of events.

Hint: All papers and documents pertaining to matters that will be discussed at the meeting should be kept in a meeting folder. The folder should contain copies of the meeting notice, a list of those to whom notices were sent, drafts of resolutions to be taken up at the meeting, and an outline of the minutes of the last meeting. An agenda can be prepared from material accumulated in the current meeting folder.

In formal meetings, the bylaws of an organization usually state the order of business of the meeting, and an agenda can be prepared from this model. A typical agenda for a Chapter meeting might include:

- Reading and/or approval of the minutes of the last Chapter meeting.
- Presentation of reports of officers and committees.
- Adoption of a resolution approving the minutes of executive committee meetings.
- Current business.

The agenda should list each item to be acted upon. A copy of the agenda with copies of all minutes, reports, and resolutions attached should be furnished to each participant.

LEADERSHIP SKILLS

Rate Yourself as Meeting Leader

- Do I have clear objectives for the meeting?
- Am I selective about the invited participants?
- Do I prepare an agenda and distribute it in advance of the meeting?
- Do I arrive early enough to check the arrangements?
- Do I start the meeting promptly regardless of who is present?
- Do I follow the agenda?
- Do I manage time and conclude the meeting as scheduled?
- Do I elicit everyone's participation?
- Do I help in the resolution of conflict?
- Do I maintain proper control of the discussion?
- Do I summarize accomplishments at the end of the meeting and clarify any action to be taken?
- Do I prepare and distribute a memorandum of discussion?
- Do I request evaluative feedback from participants?
- Do I take agreed upon action?
- Do I follow up on action to be taken by others?

Give Yourself and Your Chapter a Check Up

- Structure – does it match the identified vital components? A change may work to meet needs – ensure all members know about it. Think outside of the box if you have to. Two Chapters could meet together to share ideas and work out plans.
- Evaluation process in Chapters – is it simple?
- Success – how are you gauging it?
- Recruiting – whom are we recruiting?
- Membership – serve the members, meet their needs.
- Contact – alternative solutions if your Chapter cannot maintain contact in the usual manner (e-mail, chat groups).
- Do not use the word "drowning" – it has a negative connotation. Use the word "swamped" as you can always fix a swamped situation.
- Change can be a good thing – discuss new ideas to meet a changing environment.
- To get out of a situation – acknowledge that you are in a situation and begin to focus on solutions. Ask for help to make the changes.
- Share your success stories with other Chapters.
- Brainstorm for new ideas with division or other Chapters when needed.
- Ask for help from division when you need it – let them know exactly what you need. If your expectations are higher than can be met, be flexible.

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- Focus on enthusiasm!

Chapters are not islands. We all belong to the association and can work together. Remember not to envy other Chapters, we each have our own unique problems. Acknowledge that sometimes work and home priorities will affect member abilities to attend and participate at the same level.

Revitalization means change. Put the emphasis on member retention. Follow-up on people who have left and invite them to come back. If they don't come back, find out why. Maybe you've changed and they don't know.

Take pride in your personal and professional development. Discuss this with new members and prospective recruits. Find out the goals and interests of the people you are bringing to the Chapter meetings.

Don't focus on issues, focus on working together. Make a promise to each other that we are going to be successful and make each other successful.

Sample Script for Chapter Meeting

Note: The lectern should never be open or left during a meeting.

CALL TO ORDER

The President takes her/his place, stands quietly for a few seconds, taps the gavel *once*, waits until the group is quiet, then says: "The regular meeting of the _____ Chapter will come to order."

OPENING CEREMONIES (Optional)

The call to order may be followed by religious or patriotic exercises, or by other opening ceremonies. "The invocation followed by the Pledge of Allegiance to the Flag of the United States of America will be given by _____. Will the audience please rise."

WELCOME AND INTRODUCTIONS

The Chair welcomes members and guests, introduces those seated at the head table, and may introduce those of rank in the audience. "We welcome each of you tonight and we hope that it will be both informative and enjoyable for you. At this time, the Chair will introduce those seated at the head table. (Note: If just officers and speaker at the head table, "At this time the Chair will present the head table...") Beginning on my far left, Treasurer, Mary Blue. Next to

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Mary..., etc. Those seated in the audience who are serving at Division and International levels are..."

ROLL CALL (Recording Secretary)

QUORUM (Recording Secretary)

"Madam President, there are _____ members present which constitutes (or does not constitute) a quorum."

MINUTES

"The Secretary will read the minutes of the previous meeting."

OR

"The minutes were printed and published. Are there any corrections to the minutes?" There being no corrections, the minutes are approved as read (published)."

OR

If corrections: "The Recording Secretary will make the correction(s). Are there other corrections? (Pause) The minutes are approved as corrected."

CORRESPONDENCE (Corresponding Secretary)

The Corresponding Secretary reads official correspondence, first stating from whom it was received, and if possible, condensing the information.

TREASURER'S REPORT (Treasurer)

"The Treasurer will now report."

OR

"The Treasurer's Report was published. Are there any questions concerning the Treasurer's Report? If not, the report will be filed."

If it is the time for the audit as provided by the Bylaws, the President will call on the Audit Committee Chairman, and then the Audit Report is adopted. No motion is necessary. "The question is on the adoption of the Audit Report. Is there any debate?" Then take the vote.

The Treasurer's report is NEVER adopted; it is the Auditor's report that is adopted.

"Are there any bills?" The Treasurer reads the bills and may move that they are paid, or any member may make the motion. A second is required.

BOARD REPORTS

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"The next business in order is hearing reports of the Board. Has the Board of Directors a report to make or any recommendations to make to the assembly?" (Report only, followed by any recommendations and the motion to adopt by the Secretary.)

Secretary: "Madam President, by direction of the Board of Directors, I move the adoption of the following recommendations..."

(Recommendations may be considered at this time, or under new business.)

"The question is on the adoption of the recommendation that...Is there any debate?"

"Are you ready for the question? (Pause) The question is on the recommendation that.... As many as are in favor of the motion, say aye. As many as are opposed, say no. The ayes have it and the motion is adopted.

Announce results.

STANDING COMMITTEE REPORTS

"The next business in order is hearing the report of the _____ Committee. The _____ Committee will now report."

List the committees NEVER the chairman, known to have reports and call on them.

"Do any other standing committees wish to report?"

The President checks in advance and calls on, in the order listed in the Bylaws, ONLY those who have reports to make. The chairman, or reporting member, moves the adoption of motions or resolutions to implement recommendations of the committee. No second is required, unless it is a committee of one.

SPECIAL COMMITTEES (Ad Hoc or Select)

"The next business in order is hearing reports of Special Committees. The _____ Committee will now report."

SPECIAL ORDERS

LEADERSHIP SKILLS

"The next business in order is the motion that which was made a special order for this meeting." "The next business in order is the election of officers."

ELECTIONS

NOMINATIONS (Can also be a Committee Report)

UNFINISHED BUSINESS

"The next business in order is Unfinished Business and General Orders. The question is on the motion that was postponed from the previous meeting that"

"At the last meeting notice was given of a proposed amendment to the Bylaws"

Note: The Chair should not ask if there is any unfinished business, but should list any subjects in correct sequence if the minutes show there is some business to come up under this designation.

NEW BUSINESS

"New Business is now in order. Is there any new business?"

PROGRAM

The program may be presented before or after the business meeting, depending upon the situation. The Chair calls on the Program Chairman to present the program.

GOOD OF THE ORDER (Optional)

If the meeting has time allotted for "Good of the Order," it would be handled just before "Announcements," which refers to the general welfare of the organization, and may vary in character.

"We will have a ten-minute Good of the Order. This is your time to present any thoughts, ideas, questions, gripes or praises, whatever, to the Chapter. This is an informal, off-the-record session. No minutes will be taken. Mary will be the timekeeper. At the end of the ten-minute period, if you would like the session extended, we will need a motion at that time."

ANNOUNCEMENTS

The Chair makes her/his announcements first, then asks for other announcements.

CLOSING AND ADJOURNMENT

LEADERSHIP SKILLS

An invitation may be extended to guests to return; a closing thought may be given.

The meeting may be adjourned by general consent or by a motion and vote of the assembly.

"Is there any further business?"

"If there is no further business, the meeting will adjourn. (Pause) There being no further business, the meeting is adjourned." Tap gavel once to signify the meeting is adjourned.

Note: Each organization has a certain meeting at which elections are held, certain reports are given, special action is required, etc. Bylaws and other rules should be checked for this information and these items placed on the agenda for those particular meetings.

Meetings should not last any longer than 30-45 minutes. If you cannot conduct your business in that length of time, you are not running your meeting efficiently and effectively. It is your duty and responsibility as Chair to keep the meeting flowing smoothly in order to get the most business conducted in the least amount of time. Take into consideration your members have all worked full days and are already tired by the time they get to the meeting. For those Chapters who have their meetings at lunchtime, it is particularly important for you to keep your meetings brief, keeping in mind everyone has to get back to their jobs.

Have fun and keep in mind the following quote by Henry James, a 19th century philosopher, "Three things in human life are important: The first is to be kind. The second is to be kind. And the third is to be kind."

Recording Secretary

The office of Secretary is often considered an entry level to leadership positions. It is, nonetheless, a position of significant responsibility and a more important office than some members realize. As incoming Secretary, you will have an opportunity to observe firsthand the duties and responsibilities of all Chapter officers. Seeing the ways these duties are performed will help prepare you for further growth and development within the IAAP experience.

The Secretary bears a large part of the responsibility for good interpersonal relations and effective cooperation among the members of the Board. You can do a great deal to make the Board and the Chapter function smoothly. Your sense of responsibility and promptness in communication, and in making sure that the right information gets to the right people at the right time, will be important to the growth and vitality of your Board and of your Chapter.

An organization may have as many officers as it deems necessary, but in order to function properly it must have a presiding officer (President) and a Treasurer. YOUR office is of great importance.

Holding a Chapter office pays dividends that you probably won't gain from membership alone. It will give you a clearer insight into the workings of IAAP, and will let you see, first-hand, its variety and adaptability.

So, you ask....What makes a good Recording Secretary for a Chapter? Promptness, accuracy, a knowledge of organization objectives, policies and methods, and a sincere desire to help the President run a business-like meeting.

Duties of the Secretary

The duties of the Secretary are found in the bylaws of each Chapter. How specific these duties are defined varies. Shown below is a basic description:

- The Secretary will record the minutes of all meetings of the Chapter and of the executive board and will perform other duties as may be delegated.

Generally, "those duties delegated" are expanded in the bylaws to spell them out more specifically. Usually, the duties of the Secretary are to:

- Keep accurate minutes of all business meetings of the Chapter and the Board.
- Maintain a membership list (unless another officer has this duty).

LEADERSHIP SKILLS

- Write correspondence and send out notices, including meeting notices (if there is no one else assigned to this duty).
- Work in close harmony with the President.
- Prepare the agenda for meetings unless the President prefers to prepare it.
- Keep a file of the records of the Chapter, including a file of the committee reports.
- Keep assigned record books up to date, including the bylaws, special rules of order, standing rules, and minutes, with any amendments to these documents properly recorded.
- Take to each meeting: minute book, agenda, bylaws, standing rules, list of committees and members, pen, paper, and any records or supplies which may be needed.
- Call the meeting to order if the President, President-Elect, and Vice President(s) are absent, and preside until a temporary chair is elected by the assembly.
- Give the President a copy of the minutes as soon as possible after each meeting.
- Give all material pertaining to the office to the newly elected Secretary.

Contents of Minutes

Minutes are the legal records of the Chapter. They are an accurate recording in outline form of the actions that occurred in a meeting. Points to keep in mind when recording minutes:

- Use a copy of the agenda to compare it with the content of the minutes.
- Remember what was DONE at the meeting; NOT what was SAID by the members.
- They should never reflect the secretary's opinion, favorable or otherwise, on anything said or done.

The first paragraph should contain:

- The kind of meeting – regular, special, adjourned regular, or adjourned special.
- Name of organization (Chapter).
- Date and time of the meeting, and the place if it is not always the same.
- Presence of, or names of substitutes, for, regular presiding officer and secretary (you may also want to record other officers in attendance).
- Whether the minutes of the previous meeting were read and approved (as read or as corrected).

The second paragraph should contain:

- Balance reported by the Treasurer.
- Reading of any submitted bills requiring approval by the members.

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The body of the minutes should contain a separate paragraph for each subject matter, and should show:

- All main motions or motions to bring a main question before the members, EXCEPT any that were withdrawn, and should contain the following information:
 - Exact wording of any main motion which was adopted or otherwise disposed of by the members.
 - Name of the maker of the Motion only. The name of the seconder need not be recorded unless ordered by the members.
 - Disposition of the motion – whether adopted, not adopted, or how disposed of temporarily.
- All points of order and appeals, whether sustained or lost, together with the reasons given by the chair for the ruling.

The last paragraph contains:

- The time of adjournment.

Additional points to remember

- Nothing is erased from the minutes. Corrections are made in the margin and initialed by the Secretary.
- When a count has been ordered or the vote is by ballot, the number of votes on each side should be entered; and when the voting is by roll call, the names of those voting on each side and those answering "Present" should be entered. If members fail to respond on a roll call vote, enough of their names should be recorded as "Present" to reflect that a quorum was present at the time of the vote.
- The name and subject (topic/title) of a guest speaker can be given, but no effort should be made to summarize the speaker's remarks.
- Minutes should be signed by the Secretary and can also be signed by the presiding officer. The words "Respectfully submitted" are NO LONGER USED.
- Minutes are usually approved by general consent of those members in attendance.

If the minutes are brief, the body should be double-spaced and triple-spaced between paragraphs. If the minutes are long, they should be single-spaced for the text and double-spaced between headings. When side subheadings are used, it is not necessary to indent the paragraphs. Allow a one and one-half inch left margin and one-inch right margin. The title should be capitalized and centered.

LEADERSHIP SKILLS

Do's and Do Not's in Writing Minutes

DO keep the minutes in a permanent book.

DO read the minutes from the permanent copy. Minutes DO NOT need read if they were published.

DO record business ONLY and make it BRIEF AND CONCISE.

DO state motion in full and include:

Name of the maker of the motion.

Statement of motion.

Action taken.

i.e., It was moved by _____, and seconded that the Minutes of the _____, 2002, meeting be approved as corrected. Motion carried.

DO write minutes as soon as possible after the meeting at which the notes were taken.

DO learn to write short, concise minutes.

DO leave margins on both sides of a page for corrections. Make corrections by drawing a line through incorrect part. Write corrections in ink in the margin – and initial corrections.

DO include a count of "ayes" and "nays" where there is a counted vote.

DO include the full election report of votes received.

DO include the names of those voting on each side and those answering "Present" if a vote is taken by roll call.

DO attach to the minutes as exhibits all reports of treasurer, written committee reports, revisions, budget, audit and other statistical reports that should be a matter of record available at all times.

DO send a copy of the minutes to the presiding officer.

DO NOT wait to write minutes until notes are indecipherable.

DO NOT include everything said and done. Minutes are a record of the actual BUSINESS of a meeting.

DO NOT include motions that were withdrawn.

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DO NOT say, "Respectfully submitted" at the end of the minutes. Just sign your name. The presiding officer may also sign.

Common Questions about Minutes

- Must the Secretary address the Chair as she/he rises to read the Minutes? **NO**
- May the Secretary make motions and debate? **YES**
- Are the Minutes of the Board of Directors or Executive Committee read to the assembly? **NO, unless so ordered**
- Who may look at the Minutes? **All members**
- Has an organization the right to demand that the Minutes of its Executive Board be read to the organization? **YES**
- Is it good procedure to authorize a committee to approve the Minutes? **YES**
- Is it correct procedure when the Secretary is asked, "To cast the ballot?" **NO**
- If a member requests that her/his vote be recorded in the Minutes, is it proper for the Chair to state the request and ask if there is any objection? **YES**
- When a count is taken by ballot, the votes "for" and "against" are recorded. Does this apply to an election also? Is the vote for each candidate recorded? **YES, to both questions**
- How should the report of the tellers be recorded? Is it sufficient to simply state who was elected? **Full report is recorded**
- Has the presiding officer the authority to insert anything or alter Minutes? **NO, except as any member may offer corrections**
- Is it right to read Minutes from notes and then copy the corrected notes into the permanent copy? **NO**
- Are the minutes the official record of an organization? **YES**
- How much of a committee report should be recorded? **Committee reports that should be of record should be filed in writing**
- Is it good procedure for the Secretary to record a "digest" of a speaker's talk? **NO, unless so instructed**

LEADERSHIP SKILLS

Sample Minutes

MINUTES OF THE REGULAR MEETING
EVERYONE'S CHAPTER IAAP
APRIL 1, 2002

CALL TO ORDER:	The regular meeting of Everyone's Chapter IAAP was called to order by the President, XXX, at 6:30 p.m. at the Embassy Suites in Columbus, Ohio.
OFFICERS PRESENT:	President, XXX; President-Elect, XXX; Vice President, XXX; and Corresponding Secretary, XXX
WELCOME AND INTRODUCTIONS:	The President introduced those seated at the speaker's table. XXX gave the welcome.
HONORED GUESTS:	Honored guests were: XXX, Ohio Division President; XXX, Ohio Division Recording Secretary; and XXX, Ohio Division Parliamentary Advisor.
TREASURER'S REPORT:	The Treasurer reported a balance on hand as of April 1, 2002 of \$x,xxx.xx. There were no bills.
OFFICER'S REPORTS:	(List in order they were given.)
STANDING COMMITTEE REPORTS:	The following committees reported the progress of their programs: (List in order they were given.) (If only verbal reports are given, a brief summary may be included in the Minutes, although it is not necessary.)
SPECIAL COMMITTEES:	The following special committees reported: (List in order they were given.) (Upon completion of their work, their reports are filed, and accepted, and the committees are dissolved.)
UNFINISHED BUSINESS:	There is no unfinished business.
COMMUNICATIONS:	A letter was read from the Retirement Trust Foundation asking for the Chapter's continued support.
NEW BUSINESS:	It was moved by XXX and seconded that Everyone's Chapter sends a \$100.00 contribution to the Retirement Trust Foundation for the 2001-2002 year. Motion carried.
ANNOUNCEMENTS:	The next meeting will be May 1, 2002.
PROGRAM:	Anita Reed presented a program entitled "Nobody's Perfect."

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ADJOURNMENT: | There being no further business, the President adjourned the meeting at 8:15 p.m.

Someone's Name
Recording Secretary

Someone's Name
President

Approved: _____

Keep in Mind: Minutes are a record of what happened, NOT WHAT WAS SAID. OPINIONS (and adjectives) DO NOT belong in the Minutes.

Corresponding Secretary

Duties and Responsibilities

- Prepare and mail notices of all regular monthly Chapter meetings (if required by Chapter Bylaws and Standing Rules).
- Send notices of Board of Directors' meetings, and notify the President of the expected attendance (if required by Chapter Bylaws and Standing Rules).
- Handle the Chapter correspondence as directed by the President. Use format and style in keeping with a professional organization.
- Personally sign all correspondence, unless otherwise directed by the President.
- Write letters of welcome to new members over the President's signature (if required by Chapter Bylaws and Standing Rules).
- If applicable, file the name and address of Chapter President and Corresponding Secretary with the local Chamber of Commerce, Board of Trade, and Better Business Bureau immediately upon installation of officers.
- At Chapter meetings be prepared to read communications at the request of the President.
- If the Chapter does not have a supplies comptroller, the Corresponding Secretary should maintain a supply of stationery, IAAP brochures, envelopes and other materials used by the Chapter. Supplies for special occasions should be handled by the Chairman of the event with any surplus being returned to the Corresponding Secretary.
- Keep current, orderly files and deliver all pertinent files to the incoming Corresponding Secretary within the time specified in the Chapter Bylaws and Standing Rules; if not stated, within 30 days from the date of installation.

Improving Your Business Writing Techniques

Words, words, words: You start life without them and spend your early years effortlessly developing vocabulary through constant chatter. Why, then, does the task of putting those words on paper seem so difficult to so many people?

As an administrative professional, your job as a business writer is fraught with decisions, raging from choosing the format and tone for a document to choosing the length for that document. All these decisions depend on your ability to accurately analyze your audience, on the nature of your topic, and on the type of your business. Whether you are writing to the administrative professional in the next office or to the president of a client company, all correspondence shares two goals: to communicate to people who are as busy as you are, and to take the least possible amount of time in doing so.

Tone

- Be brief. In most business writing, brevity is key. But don't give up the proper tone in favor of fewer words. The proper tone puts the reader in the optimum state of mind to deal with your message.
- Be confident in your writing. If you can't obtain firsthand information about your topic, do the research necessary to learn enough to believe in your message.
- Observe the writing styles of others. This is especially important in partnership writing. Your document will undergo fewer edits if your writing tone resembles that of a person whose signature will appear on the document.

Content

- Match your tone to the reader. If your audience wants to see a formal tone, use one. If the reader needs sympathy, offer it.
- Answer possible questions. Try to anticipate and answer all questions the reader may have. Remember, if you meet the reader's needs, the reader will in turn meet your needs.

Usage, Grammar, and Punctuation

- Find a good style guide. Take time to familiarize yourself with the volume, then use it for reference whenever you feel the slightest twinge of doubt about grammatical issues. Keep in mind that grammar exists to further clarify communication.
- Leave the details for later. Proper use of language is essential if you really want to make a point, so why do it when your mind is cluttered with other concerns? Wait until the thoughts are firmly in place before addressing these details in earnest.

Writer's Block

- When you can't write, write anyway. Once you get something on the screen, no matter how outrageous the words seem, you have a concrete document to address. Once you can see something, fixing it is a snap. Make an appointment with yourself to work on that troublesome report next Tuesday; then, when Tuesday comes, hop to it!

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- Find unblocking techniques that work for you. It may be scrubbing floors or listening to a Beethoven Concerto. Somewhere, there is a nonverbal activity that unblocks the door to creativity for you.

Using Automation

- Automate your correspondence with a master document file. Take full advantage of your computer's file structure system to locate masters quickly.
- Use your word processor effectively. Even the most basic word processor provides the editing tools that help remove much of the pain from writing.

Training Your Mind

- Let your subconscious mind lead the way. Many people don't realize the important role that the subconscious mind plays in creativity. Learn to work with your mind's natural processes to generate ideas effortlessly, and most important, relax!
- Give your mind a computer assist. Your word processor's editing tools make writing easier almost automatically. When you consciously use these tools in conjunction with your subconscious mind, the results can be impressive.

Finally, keep in mind that writing is a highly personal process. The techniques that start some fingers pounding on the keyboard leave others tapping on the desk in frustration. Get to know yourself well enough to find the writing enhances that work for you. Then, start keying up for the best writing you've ever seen!

Twenty Questions Letter Writers Should Ask Themselves

1. Does my letter look neat and professional?
2. Have I followed one letter format (full-block, semi-block) consistently?
3. Are my margins wide enough – at least 1-1/2 inches all the way around?
4. Did I spell every word, including the reader's name, correctly?
5. Have I corrected every typographical error?
6. Did I tell the reader exactly why I am writing?
7. Does my letter adopt the "you attitude"?
8. Are my words clear and precise?

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9. Is my letter form flowery and stuffy language?
10. Do I get my message across politely and sincerely?
11. Have I answered the reader's questions without including irrelevant material?
12. Have I eliminated unnecessary repetition?
13. Are all my facts – costs, names, topics, dates – correct?
14. Have I included all necessary information – dates, quantities, locations, names, costs, references to previous orders or letters?
15. Does my last paragraph sum up my letter appropriately?
16. Have I chosen an appropriate complimentary close (for the full-block or semi-block format)?
17. Did I sign the letter in ink?
18. Have I indicated an enclosure line if I am sending something with the letter?
19. Is my return address on the upper left front of the envelope?
20. Does the reader's name and address on the envelope match the inside address?

Proofreading

Before errors can be corrected, they must be found. This requires careful proofreading and checking. Most administrative professionals do their own proofreading; but if material is technical, long or difficult, it may be necessary to proofread with a co-worker.

Careful proofreading can eliminate some of the time spent making corrections. Hints for accurate proofreading:

- Take your time. Proofread slowly. Check the page for format and style, looking for such things as consistently indented paragraphs, uniformly typed headings, and correct horizontal spacing.
- Scan the page for obvious errors such as typographical, spacing, and word division errors.
- Read the material backwards. It helps to read aloud. Read the page for content and meaning. Errors such as an omitted word or a word typed twice, which are not usually found in scanning, can be found.

Treasurer

Frequently Asked Questions

- What is a consolidated position bond, and why should we have one?
 - A consolidated position bond protects your Chapter from the misuse of funds by those who are authorized to sign checks for your Chapter. Every officer who can sign checks should be bonded. Policies are normally for three years and are available through IAAP. Make sure you know when your position bond should be renewed, and renew it promptly.
- What is an EIN, and how do I obtain one?
 - EIN stands for Employer Identification Number, and existing Chapters should know their EIN number. If not, contact IAAP Headquarters. New Chapters should submit IRS Form SS-4 to apply for an EIN. After the Chapter receives the number, a letter should be sent to Headquarters with the number so that it is on file with IAAP.
- Does our Chapter need a budget?
 - A budget is essential each fiscal year for the efficient operation of any Chapter. It helps you determine what your projected income and expenses will be for a given year, enables you to keep track of income and expenses against the budgeted amounts, and prompts you to establish line items for committee and event expenditures. Once a budget is established, it is relatively easy to revise it for future years.
- Does every Chapter need to file Form 990 with the IRS?
 - Only those Chapters with gross receipts of \$25,000 or more in a given year need to file Form 990 with the IRS.
- Who can audit the treasurer's books?
 - An auditor can be a Certified Public Accountant, another qualified outside source, or any Chapter member who has not had anything whatsoever to do with your Chapter's finances during the audit period under review.
- When our Chapter completes STF-8C (new officer) form and STF-8D (committee chairmen) form, where should they be sent?
 - It is important that each part of the multipage forms be sent to its proper recipient right away. STF-8C forms and STF-8D forms are due June 1. Not sending everything to IAAP Headquarters will delay the distribution of this information and the completion of the International Directory.

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- Where should membership renewals be sent?
 - Send membership renewals in their entirety, including the billed amount for International, Chapter, and Division dues, to Headquarters. International will then disburse the funds to the Chapter and Division.

- What if a Chapter member lets her/his membership lapse and wants to reinstate it?
 - A member who has done so will be required to pay a \$15 processing fee in order to reinstate. Failure to include this fee will result in the member being invoiced for that fee. Be sure to complete the M-7 form, Membership Reinstatement Application, and the STF-1 form, New Member and Reinstatement Report, when applying for reinstatement. Be sure to include the member's original join date and the last year his/her membership was in effect.

- What should an application for membership include?
 - When a person applies for membership in IAAP, the following two forms must be completed: the membership application itself and the STF-1 form, New Member and Reinstatement Report.

- Are there any restrictions on how a Chapter's money may be spent?
 - No Chapter should use its money to personally profit a member. However, if it is "compensation for a service rendered," such as obtaining new members, the member may be compensated in a reasonable and proportionate manner. In other words, the gift should not be disproportionate to the service rendered. The question to ask is: "Will the expenditure help the Chapter fulfill its purpose, become stronger, and become a more viable force in the profession?"

- Can an IAAP Chapter scholarship be awarded to a Chapter member?
 - There is no legal requirement prohibiting a scholarship from being awarded to a Chapter member. A member may receive the scholarship if no partiality is shown and she/he follows the same criteria of eligibility as all applicants. If the member wins, the Chapter should be able to demonstrate that she/he was the best candidate among all the applicants.

- What if a Chapter member's name and/or address changes in mid-year?
 - Complete the STF-4 form, Change of Name and/or Address, as soon as possible. This will ensure that International is updated and *OfficePro* has your correct name/address.

- What if the Chapter has a change in officers in mid-year?
 - Complete the STF-6 form, Officer Change, so that the directory can be updated accordingly. This form should not be confused with the STF-8C form for New Officers, which should be sent to the appropriate recipients by June 1 following your election of officers.

LEADERSHIP SKILLS

- When can a professional member become a professional-merited member?
 - A member who has completed five years as a professional member and has reached age 55, and is retired and/or has received forced work retirement because of physical disability is qualified to apply for professional-merited membership status. Applicants for this status must complete the M-9A form, Request for Transfer of Membership from Professional to Professional-Merited.

- How does a member transfer her/his membership to another Chapter or to member-at-large status?
 - A transferring member must complete the IAAP M-9 form, Transfer of Membership Between Chapters or To/From Member at Large. The current Chapter treasurer signs all five copies and sends it to the treasurer of the Chapter who is accepting the new member. That treasurer then signs all five copies and forwards them to International Headquarters. If the member is transferring to or from the charter-at-large classification, the division treasurer signs the form.

- What is IAAP's tax exemption status?
 - IAAP (its headquarters, divisions, and Chapters) is classified as a 501(c)6 association or organization, which exempts us from income tax as long as IRS regulations are followed. We are not, however, exempt from paying sales tax.

Duties of the Treasurer

- File necessary bank resolutions authorizing a change of signatures – from outgoing officers to newly-elected ones.

- Secure position bond.
 - International Standing Rule 6 requires the office of treasurer to be bonded. If other officers are authorized to sign checks separately or with the treasurer, then each officership should be bonded.
 - Consolidated position bond (three-year term) available through IAAP.
 - 1) Coverage available includes: \$5,000; \$10,000; \$15,000; and \$20,000 bonds.
 - 2) Three-year policy with one-time premium.
 - 3) Contact the Accounting Department at headquarters for additional information.
 - 4) The absence of an audit committee may negate bond coverage.

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- Chapter Employer Identification Number (EIN).
 - Existing Chapters should know their EIN – if uncertain, contact the Accounting Department at Headquarters.
 - New Chapters will need to submit IRS Form SS-4.
 - 1) Application by Tele-TIN-receive EIN number over phone.
 - 2) Application by mail – allow four to five weeks.
 - 3) After EIN is obtained, send letter to Headquarters.

- Third-Party Liability Insurance
 - IAAP's Blanket Third Party Liability Insurance protects participating members in the U.S., Canada, and Puerto Rico. All participating charges are included, as well as district conferences, regional conventions, and the international convention.
 - Liability coverage includes:
 - 1) Premises, operations and activities.
 - 2) Elevator liability.
 - 3) Products and completed operations.
 - 4) Owners and contractors protective.
 - 5) Contractual liability.
 - 6) Broad form property damage.
 - 7) Personal injury.
 - 8) Fire legal liability.
 - 9) Incidental malpractice.
 - 10) Hired, rented and non-owned automobile liability.
 - 11) Use or maintenance of watercraft.
 - Exclusions:
 - 1) Fireworks sold, transported, handled or distributed.
 - 2) Mechanically operated amusement devices.
 - 3) Automobile, motorcycle, boat racing or stunting.
 - 4) Rodeo.
 - 5) Bodily injury while practicing in any contest, exhibition or athletic or sports nature sponsored by the unit.
 - 6) Operation, use or maintenance of aircraft.
 - For more information, contact the Accounting Department at Headquarters. Invoices are mailed from headquarters in September.
 - This information provides a simplified description of the IAAP Blanket Third Party Liability policy and is not intended to be all inclusive.

- Treasurer's files should contain the following:
 - Copy of International, Division, and Chapter Bylaws and Standing Rules.
 - Copy of the current unit budget, unless a new Chapter, then a copy of the proposed budget.
 - Receipt book or some form of acknowledgment for money received.

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- Checkbook to disburse funds as authorized.
 - Names and addresses of the International and Division Officers.
 - Updated roster of unit members.
 - A bankers box, binder, etc. in which to keep financial records.
 - Member records to show name, address and phone number(s).
 - Cash record to show all receipts and disbursements with a balance after each entry.
 - Comparison by account of budget to actual expenditures.
 - Accounts receivable to show any monies to be received; receipts from dues, ways and means projects, etc.
 - Supply of current forms to be used in transmitting monies to Headquarters.
 - Copies of current IAAP catalogs.
 - Duties at Chapter level:
 - Monthly
 - 1) Transmit to Headquarters reinstatements, transfers, new member applications, changes in name and address, etc. (Also to Division as required.)
 - 2) Distribute membership cards as received from Headquarters.
 - 3) Disburse funds after receipt of original bills, properly approved.
 - 4) Prepare financial report for Chapter Executive Board meeting and Chapter meeting.
 - 5) Maintain up-to-date records.
 - 6) Attend all Executive Board meetings and Chapter meetings.
 - 7) File tax reports (as required) and pay taxes.
 - 8) Remit contributions to IAAP RTF, IAAP Building Fund, and IAAP R&E Foundation as received.
 - 9) Remove and destroy obsolete forms, replacing them with new revisions as issued.
 - 10) Other duties as prescribed by Chapter Bylaws and Standing Rules.
 - Year-end
 - 1) Prepare budget for following year and present to Chapter for approval in accordance with Chapter Bylaws and Standing Rules.
 - 2) Prepare necessary statements, have all records in order, and turn them over to person(s) authorized to perform audit.
 - 3) After closing books, file Form 990(as required) by October 15.
 - a) If gross receipts are less than \$25,000, you are not required to file Form 990 with the IRS, but may be required to file with your state.
 - 4) Give to successor in office all records and files in treasurer's possession which have not been turned over for audit. After completion of audit, these books, files, and records will be given to the incoming treasurer.
 - Budget
-

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A budget is necessary each fiscal year for the efficient operation of any unit. Its preparation will be governed by the local Bylaws and Standing Rules. A Finance (Budget) Committee (Treasurer is usually a member) or the Treasurer will prepare the budget for discussion and approval by the Board of Directors and/or the membership.

➤ Audit

Depending on Chapter Bylaws and Standing Rules, the Audit Committee should consist of either an "outside" source, such as public accountants, or a qualified person or persons within the Chapter. An audit should not be conducted by any person who has had anything whatsoever to do with the unit's finances during the period under review.

Annual Dues Payment

Billing of annual membership dues "International, Division, and Chapter" is direct to each member from headquarters.

Invoices are mailed to the member and a billing report is mailed to the unit. Chapter/Division will receive a check and supporting report from Headquarters each month. Membership cards are mailed to the Chapter Treasurer once a month.

IAAP Headquarters is now accepting MasterCard, Visa, Discover, or American Express for payment dues.

The following information is needed on renewal notices:

- Correct card type and account number.
- Expiration date.
- Signature.

Miscellaneous Forms

Application for Membership in the International Association of Administrative Professionals
7-00/MP/1040

Change of Name/Address/Status Report
STF-4

(Year) Chapter Committee Chairmen
STF-8D

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Contributions

RCT-1

Directory Listing for (Year) Incoming Chapter Officers

STF-8C

Membership Reinstatement Application

M-7

New Member and Reinstatement Report

STF-1

Order Form

8-01/MP/45C/030-5070-03

Officer Change Only For Directory Listing

STF-6

Proxy

4-00/MP/750/000-1671-00

Request for Approval – Authorization to Form New Chapter

M-10

Request for Transfer of Membership from Professional to Professional-Merited

M-9A

Transfer of Membership between Chapters or To/From Member at Large

M-9

Vista Grande Patio Pavers

10-99/MP/5M/00-5290-00

Parliamentary Procedures

Do you feel that only the officers, or those who wish to become officers, need to understand parliamentary procedures? This is not true – we as members should be aware of the basic fundamentals of parliamentary procedures. This will enable each of us to participate in the business meetings of our organization in an orderly and expeditious manner.

Parliamentary procedure or parliamentary law, which is somewhat synonymous, offers a basic set of rules for governing deliberative societies or assemblies. These rules are composed of a "common sense" approach to the principles of the organization and the orderly conduct of business based on the wishes of the membership or body of people chosen to act in behalf of other persons.

The history of parliamentary law began with the English Parliament. As assemblies began to form in the United States, rules of custom were used along these same principles. It was Thomas Jefferson who published the first practical model entitled "Manual of Parliamentary Practice" in 1801. This manual covered basic rules and measures of uniform procedures for legislative processes and had a wide use by Congress and the state legislatures.

As the country began to form deliberative societies, such as political, cultural, charitable, and religious groups, the need for some basic principles in establishing organizations and rules for offering free and open discussion with its members became essential.

Luther Cushing, Clerk of Massachusetts House of Representatives, published Cushing's Manual in 1845. This manual covered more non-legislative procedures and rules used for governing deliberative societies. Cushing saw a need for each organization to adopt a supplementary system of its own rules, but envisioned the task beyond the capacity of the average organization.

General Henry M. Robert (1837-1923), West Point graduate, had an engineering career in the U.S. Army. He spent years developing the basis for the current system of parliamentary procedure. The first *Robert's Rules of Order* was published in 1876. Since that time, it has become the authority for parliamentary law in the United States.

Since General Robert's death, his family has continued the ongoing process of editing and publishing, with the complete revision in 1971 being the major endeavor. At the present time, *Robert's Rules of Order Newly Revised*, 10th Edition, Published in 2000, is the pre-eminent authority on parliamentary procedure throughout the world.

Definition

Parliamentary procedure is a set of accepted rules and customs by which an assembly is able to arrive at a majority opinion of those present – accurately, impartially, and in the minimum amount of time.

Objectives

- Expedite business. The proper use of parliamentary procedure by the presiding officer and the members of the assembly, can reduce the time for the conduct of business to a bare minimum.
- Maintain order. In order for the presiding officer to have control of the assembly – and not the assembly control the "chair" – it is essential the president or chairman be thoroughly familiar with all the tools available to conduct an orderly and efficient meeting.
- Insure justice and equality to all. The will of the assembly is the end result of a vote on any motion. The minority has the right to persuade the assembly through debate, the same as the majority...but it is always the vote of the body that determines what action will or will not be taken.
- Accomplish the purpose for which the group is organized.

Basic Principles

- Courtesy to all.
- Justice to all.
- Rule of the majority.
- Rights of the minority.
- Partiality to none.
- Protection of the absentee.
- One thing at a time.

Motions

LEADERSHIP SKILLS

A motion is the means by which all business is introduced to an assembly. The term "motion" means a formal proposal that certain action be taken. Motions are classified according to their nature as:

- Main
- Subsidiary
- Privileged
- Incidental
- Those which bring a question before the Assembly

Most Frequently Used Parliamentary Motions

- Main Motion
When you want the convention to consider your idea, you say, "Madam Chairman, I move that we ... (state your idea)." Someone else seconds the motion. The Chair says, "It has been moved and seconded that we ... (restates your idea). Is there discussion?"

You may speak on behalf of your motion, and so may everyone else. You may not speak a second time if there is anyone seeking the floor or if someone objects.

- Amend
When you want to change the working of a motion, you say, "Madam Chairman, I move to amend the motion by inserting the words ... (striking the words.../striking the words...and inserting the words.../adding the words...)." Someone else seconds the motion. The Chair says, "It has been moved and seconded to amend the motion by inserting the words..."
- Point of Order
When you think a breach of the rules has occurred, you say, "Point of Order." You may interrupt business and no second is necessary. The Chair says, "State your point." The Chair then rules if your point was well taken or not.
- Division
When you doubt the vote as announced by the Chair, you say, "Division" or "I call for a division." No second is necessary. The Chair says, "A division is called. We will take a rising vote."
- Previous Question

When you want to stop debate, you say, "I move the previous question." or "I call the question." Someone else seconds the motion. The Chair says, "The question has been called. As many as are in favor of stopping debate say 'yes'..."

Parliamentary Tips

- What is a motion?
 - A motion is the form of procedure, which Parliamentary Law requires for the transaction of business in an assembly.

- How to present a motion and dispose of it:
 - A member rises and addresses the presiding officer.
 - A member is recognized by the presiding officer.
 - The member proposes a motion.
 - Another member seconds the motion.
 - The presiding officer states the motion to the assembly.
 - The assembly debates or discusses the motion.
 - The presiding officer takes the vote on the motion.
 - The presiding officer announces the result of the vote.

- What I would like to do:
 - Introduce business.
This is a main motion.
 - Kill a matter or defer it.
Move to postpone topic indefinitely.
 - Change or modify.
Move to amend the motion on the floor.
 - Let a few attend to a matter.
Move topic be referred to a committee.
 - Fix a time to attend to a matter.
Move to postpone topic to another time (specify time).
 - Limit debate or extend limit.
Move to "limit debate" or move to "extend discussion".
 - Stop debate and demand immediate vote.
Move to "Call for previous question".
 - Defer action on a question.
Move to "Lay on the table."
 - Insist on the order of business being followed strictly.
"Call for the Order of the Day."
 - Ask for intermission.

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- Move to recess.
- Make an end of the meeting.
- Move to adjourn.

Parliamentary Terms / Definitions

Agenda	An outline plan of an entire business session; an order of business.
Accept	Adopt, approve, agree to.
Adopt	Approve, agree to, accept.
Amend	Modify or change the wording or a motion before action is taken upon the motion itself.
Announcing the Vote	Declaration by the chair of the result of the vote.
Assembly	A body of people assembled for the transaction of business.
Are You Ready For The Question	Debate (discussion) is in order.
Board	A group of members of an organization authorized to act for the organization between its meetings, or as the agent; has the entire charge of a certain part of its work, subject to orders of the organization.
Bylaws	Basic rules of a society which relate to itself as an organization.
Carried	Adopted, approved.
Chair	The presiding officer; the place or station of the presiding officer.
Division Of The Assembly	A motion requiring that a vote taken by voice or by show of hands be retaken by rising.
Ex Officio	"From the office" or by virtue of the office or chairmanship. Bylaws frequently provide that the president shall be an ex-officio member of all committees except the nominating committee.
General Consent	Unanimous consent; informal agreement of the assembly. The chair asks if there is any objection to a certain procedure – silence gives consent.
Germane	Closely related; of the same subject matter. Example: an amendment must be germane to the motion to which it is applied.
Immediately Pending Question	The latest question (motion) stated by the chair when more than one question is pending.
Incidental Motions	Motions which deal with questions of procedure arising out of other motions or items of business.
Main Motion	A motion that introduces business to an assembly.
Majority Vote	Over half of the votes cast.
Meeting	A single gathering of persons or members of an organization, usually for the purpose of transacting business.

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Minutes	The record of the proceedings of an assembly. Sometimes referred to as the journal.
Motion	A formal proposal that certain action be taken, or that a certain statement express the sense, opinion, desire, or will of the assembly.
Obtain the Floor	Securing recognition by the chair as having the right to speak in a meeting.
Parliamentary Law	A consistent system of rules which govern procedure in all deliberative assemblies; founded upon certain fundamental principles originated in the unwritten customs of the House of Parliament in England; first compiled for use in this country by Thomas Jefferson, whose manual has been the foundation for the rules used in the United States House of Representatives and Senate.
Pending	Before the assembly. A motion is "pending" after it has been stated by the chair and until it is disposed of temporarily or permanently.
Plurality Vote	The largest number of votes received by a candidate or proposition when three or more choices are possible. A plurality vote never decides a question or election except by specific rule of the organization.
Previous Notice	Announcement that a specific motion will be introduced at the next meeting; substance of the proposal should be described at least briefly; unless specified otherwise in the bylaws, must be made at the preceding meeting or included in call of the meeting at which it is to be brought up.
Privileged Motions	A class of motions which, although they are not directly concerned with the business before the assembly, are of such immediate importance that they have the privilege of interrupting the consideration of anything else. All motions of the class are not debatable.
Pro Tem	For the time being; most frequently applies to the office of secretary.
Proxy Voting	A power of attorney given by one person to vote in her/his stead.
Putting The Question	Putting the motion to a vote.
Question	The business before the assembly; the motion is stated by the chair.
Quorum	The number of members who must be present in order that business can be transacted legally. The quorum is a majority of all members unless the bylaws state otherwise.
Recess	An intermission taken by the assembly.
Recognize	A member is recognized by the Chair after the member has risen and addressed the Chair by her/his proper title.
Rescind	Striking out a motion or entire resolution that has been previously adopted.
Resolution	A main motion usually of such importance and length as to be written; may or may not have a preamble setting forth the reasons for the resolution.
Revision Of The Bylaws	A complete set of bylaws submitted as a substitute for the existing bylaws.
RONR	Acronym for <i>Robert's Rules of Order Newly Revised</i> .

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Secondary Motions	Motions that can be made while a main motion is pending and which relate to business already before the assembly, to questions or order or procedure, or to matters of comfort or privilege. There are three classes of secondary motions: subsidiary, privileged, and incidental.
Seconding A Motion	Agreeing that a motion should come before the meeting.
Session	A meeting or a series of meetings with a single order of business, agenda, or program.
Sine die	Without a day. When an assembly adjourns, it is dissolved, and that assembly ceases to exist. (A convention of delegates.)
Standing Rules	Regulations for the guidance of an organization usually adopted by majority vote without previous notice.
State The Question	Formally placing a motion before the assembly and indicating (where appropriate) that it is open to debate. Wording of a motion in the minutes should be exactly the same as when stated by the chair.
Subsidiary Motions	Motions that assist the assembly in treating or disposing of a main motion (and sometimes other motions).
Takes Precedence	Outranks; used in reference to the order in which motions can be introduced and must be considered by the assembly.
Tellers	A committee appointed to count the votes and report the same to the assembly.
Two-thirds Vote	Two out of three of the votes cast. For two-thirds approval, the affirmative vote is at least twice as large as the negative.
Unfinished Business	Questions that have come over from the previous meeting because that meeting adjourned without completing its order of business.
Vote	A formal expression of the will, opinion, or preference of the members of an assembly in regard to a matter submitted to it.
Yield	Give way to. A pending question yields to one of higher rank.

Teller's Report

Tellers are used when voting is to be by ballot (secret) vote. They are appointed by the Chair to distribute, collect, and count the ballots.

When counting ballots you ignore blanks and do not count illegal votes (i.e., you vote for two instead of one or unintelligible votes).

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The Teller's Report is given by the Chairman of the Tellers, who stands, addresses the Chair, reads the Teller's Report, and hands it to the Chair without declaring the results. In the case of an election, the report should follow this form:

TELLER'S REPORT

Number of votes cast	97
Necessary for election (majority)	49
Mrs. A. received	51
Mrs. B received	35
Mr. C received	10
Illegal votes	1

A majority vote is more than half of the votes cast (e.g., one-half plus one).

In an election, the Chair separately declares the election of each officer.

The Teller's Report is entered in full in the minutes, becoming a part of the official records of the organization.

Miscellaneous

Parliamentary procedure is a set of rules that allows an organization's business to be conducted fairly and efficiently. Among the procedures covered by parliamentary authorities are making perfect business motions, nominations and voting, writing bylaws, and responsibilities of officers.

Fundamentally, under the rules of parliamentary law, a deliberative body is a free agent to do what it wants to do with the greatest measure of protection to itself and of consideration for the rights of its members.

Please refer to *Robert's Rules of Order Newly Revised* (10th Edition) for details regarding various types of motions.

Bylaws

Purpose

The bylaws of a society are the documents that contain its own basic rules relating principally to itself as an organization, rather than to the parliamentary procedure that it follows.

The bylaws contain:

- Name and object of the society.
- Qualification of members.
- Officers, their election and duties.
- Meetings of the society.
- How to amend the bylaws.
- The rules of order.

Format

ARTICLE I – Name

ARTICLE II - Object

ARTICLE III - Members

- Section 1: Classification
- Section 2: Qualifications
- Section 3: Dues
- Section 4: Resignations
- Section 5: Reinstatement

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ARTICLE IV - Officers

- Section 1: Name Offices
- Section 2: Qualifications
- Section 3: A. Nomination
B. Election
Vacancies
- Section 4: Term
- Section 5: Duties

ARTICLE V - Meetings

- Section 1: Regular
- Section 2: Annual
- Section 3: Special
- Section 4: Quorum

ARTICLE VI – Executive Board

- Section 1: Who they are
- Section 2: Duties
- Section 3: When meet, who calls
- Section 4: Quorum

ARTICLE VII - Committees

- Section 1: Standing Committees are, Duties
- Section 2: Special Committees
- Section 3: President an ex-officio member of

ARTICLE VIII - Representation

- Section 1: Delegate/Alternate
- Section 2: GLDC Representative
- Section 3: Report made

ARTICLE IX - Audit

- Section 1: Books audited within (days)
- Section 2: Vacancy in office of Treasurer

ARTICLE X – Dissolution

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ARTICLE XI - Amendments

- Section 1: How Bylaws amended
- Section 2: How Standing Rules amended
- Section 3: Grammar, punctuation, correlation
- Section 4: Editing
- Section 5: When effective

Protocol and Courtesies

Commonly Followed in Deliberative Societies

The term "protocol," as used in most deliberative assemblies, embodies the courtesies, amenities, and rules of etiquette used in the official life of an organization.

It provides a pattern for recognizing and honoring officers, leaders and distinguished guests. It prescribes the courtesy and etiquette generally used to establish the order of introductions, presentations, speaking, seating at the head table, and positioning in a receiving line.

The presiding officer is generally responsible for directing the application of principles of protocol within a society. In many instances, however, this responsibility may be delegated to others.

Custom varies greatly from society to society. Standards for protocol and behavior outlined in this booklet are general guidelines for leaders.

All information of a parliamentary nature is based upon *Robert's Rules of Order Newly Revised* (10th Edition).

Invitations and Follow-up Communications

- Are written – but first contact may be made in person or by telephone.
- Establish:
 - Place, date, and hour of meeting.
 - Arrangements for hotel reservations.
 - Name of host or escort.
 - Arrangements for transportation.
 - Type of dress (climate and degree of formality might be suggested).
 - General subject for speech.
 - Hour expected to speak, for how long, and approximate size of audience.
 - When available, names of other guests.
 - Honorarium arrangements.

Arrange for:

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- Biographical information for publicity and introduction.
- Photo for publicity (to be returned).

Introduction of Speaker

- May be made by presiding officer, program chairman, or designated chairman of the day.
- Should be brief, giving speaker's background and qualifications for covering subject.
- Introducer remains standing until introduction has been acknowledged by speaker.
- When too much time is given by speaker, presiding officer should remind him, preferably by note, that "time is almost gone" or "one minute more" – and later if speaker continues, should state that "time is up and, unfortunately,..." Having an appointed timekeeper may help.

Thanking Speaker

- Time is allowed for assembly to applaud.
- Brief thank-you is expressed by person who had introduced the speaker.
- Presiding officer may add brief words of appreciation.
- Thank-you notes are sent promptly by proper authority.

Seating and Positioning of Persons of Prominence – Determined by Rank and Role

1. In Receiving Line
 - A. Persons are positioned:
 - 1) In respect to position in government or religious organizations.
 - 2) In accordance with level or organization at which office is held (National – highest; District, State, District within State, Local).
 - a) At national functions, national president is ranking officer.
 - b) At state functions, state president is ranking officer.
 - c) At Chapter function, Chapter president is ranking officer.
 - 3) In respect to rank within a certain level of the society and as listed in the bylaws.

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- a) Usually: president, president-elect, vice-president, secretary, treasurer, etc.
- b) Elected officers outrank appointed officers, with some exceptions.
- c) Officers outrank chairman.

NOTE: Yearbooks are helpful resources for determining rank.

- B. Line is formed to the right of the president:
 - 1) The president is first in line.
 - 2) The guest of honor stands next to the president; others stand according to rank.
 - 3) A designated host greets each person approaching the line, then states his name clearly when presenting him to the president.
 - 4) The president introduces each individual to the guest of honor. (In large meetings, a list of those to be in the reception line is provided for all in attendance.)

2. At Head Table

- A. Two generally acceptable patterns of seating:
 - 1) Presiding officer is seated in center, or when number of seats is even, at first seat to right of center.
 - 2) Guests are seated alternately, according to rank, first to the right, then left, right, left, etc. of presiding officer.
 - 3) Highest ranking guest is always seated at the right of the presiding officer.
 - 4) Person who is to introduce speaker is seated at immediate left of presiding officer.
- B. Two-section pattern:
 - 1) Presiding officer is seated in center, or when number of seats is even, at first seat to right of center.
 - 2) Guests are seated to the right of the presiding officer in order of rank, with the highest next to the presiding officer.
 - 3) Officers are seated to the left of the presiding officer in order of rank, with the highest at the immediate right of the presiding officer.
 - 4) Highest ranking guest is always seated to the immediate right of the presiding officer.
 - 5) Person who is to introduce speaker is seated at immediate left of the presiding officer.
- C. Patterns are adjusted to allow parliamentary advisor and secretary to be positioned for convenience of presiding officer (usually to the immediate left) when business is being conducted.

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3. Introduction of guests and dignitaries:
 - A. Distinction between "introducing" and "presenting":
 - 1) Persons not known to assembly are introduced.
 - 2) Persons known to assembly are presented.
 - 3) An "introduction" is generally more informative than a "presentation."
 - B. Procedures for introductions:
 - 1) When guests are to nod or stand only, they are introduced from highest ranking to lowest.
 - 2) When some or all guests are to "say a few words," they are introduced from the lowest ranking to the highest.
 - 3) Visiting national officers are introduced immediately after the guest of honor.
 - 4) Members rise in recognition of the office when national president is introduced.
 - C. In Introduction of past presidents:
 - 1) Officer who served more recently is introduced first, then others in order of seniority (near to far). Order may be changed when past presidents are called upon for remarks, installation of officers, or other special responsibilities.
 - 2) Years of officer's administration are usually stated before officer is identified by name.
 - D. Introduction of a person who is to present a speech may be postponed until time for the speech.

Prayers for Assemblies

- Invocation – a prayer for divine assistance.
 - Should be short and non-sectarian unless all present are of one faith.
 - Presiding officer awaits complete silence, then calls upon invocator.
 - Assembly rises at direction of presiding officer or of invocator.
 - In large meetings, invocator is usually a recognized religious leader or member of the clergy. In non-sectarian meetings, members of various faiths may be asked to serve.
 - Invocator is seated at head table if possible.
 - Invocation is given *before* the Pledge of Allegiance to the Flag of the United States of America.

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- Grace – thanks offered or a blessing asked before a meal.
 - Assembly usually remains seated.
 - Should be non-sectarian unless society is of one faith.
 - Person who offers thanks or the blessing, is seated at head table if possible.

- Inspiration – a spiritual or ethical thought or message.
 - If presented at beginning of meeting, assembly may be requested to stand.
 - If presented at close of meeting, assembly usually remains seated.
 - Is often presented by a layman or by the presiding officer.
 - Often consists of an appropriate poem or quotation from a famous person or former leader of the society.
 - Is given *after* the Pledge of Allegiance to the Flag of the United States of America.

- Memorial – a tribute, usually spiritual in nature, to those who have served a society and are no longer among the living.
 - Varies from a moment of silence to an elaborate, formal ceremony.

Miscellaneous Suggestions

- Names
 - Proper pronunciation of names should be ascertained and mastered.
 - Name tags should be provided in large meetings:
 - a. Name and identification should be printed large enough for easy legibility.
 - b. Tags placed near right shoulder are readily visible during handshake.

- Presentation of Gifts
 - To present gifts of recognition or appreciation, presenter speaks briefly, mentioning:
 - a. Reason for making the presentation.
 - b. Special significance, if any, of the object being presented.
 - c. Name and achievements of the recipient.

- Acceptance of Gifts
 - Words of thanks are brief:
 - a. May mention achievements of the society making the presentation.
 - b. May pay tribute to the membership.
 - c. If appropriate, may mention use to which gift will be put.

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- Package is opened and gift displayed. (If several persons receive similar gifts, opening by each is not necessary.)

Understanding IAAP

History of IAAP

During World War II, the U.S. government issued frantic calls for secretaries, clerks, and others who could assist in the war effort. Secretaries "manned" the home front and the office front as many women entered factories, war plants, and various jobs formerly held by men. In 1942, to provide a network for secretarial staff, the National Secretaries Association (now known as the International Association of Administrative Professionals) was established.

The president of the National Secretaries Association's first Chapter (Kaw Chapter in Topeka, Kansas) was Florence Overbey, who enlisted in the Women's Army Corp. Another founding member, Anita Harwick of Topeka, joined the WAVES. Numerous other NSA members enlisted in the women's branches of the Armed Services. Others volunteered services for local branches of the Red Cross, or selling war bonds, handling correspondence, and other volunteer activities (putting their skills to work AFTER being at their regular jobs all day – or night, if they were on the swing shift with Rose the Riveter).

In May 1942, Articles of Incorporation were filed under the laws of the State of Missouri. Autonomous Chapters sprouted all over the Midwest in the mid-40s, and soon spread across the country.

The first issues of the association's magazine, *The National Secretary* (now *OfficePro*), were published in 1943. In 1944, efforts began to unify the Chapters into one centrally-governed association, similar to its structure today.

The first inter-Chapter meeting of the association was held at Omaha, Nebraska, in April 1944, with members from Kansas City, Des Moines, Lincoln, and Omaha in attendance. At this meeting, a plan was drafted for establishment of a district comprising Chapters in that area.

After the war years, the first nationwide convention was held in Kansas City, Missouri, in February 1946. From the attendance there it was possible, for the first time, to gauge the progress of the association on a national scale. The convention register included names of approximately 200 members, 49 of who were voting delegates. There were 115 Chapters at that time.

In July 1946, Amended Articles of Incorporation were filed in the State of Missouri which vested the control of the association in the membership, established a democratic form of government, with equal rights of every Chapter to a voice in association affairs, and gave the members the right to elect their own officers.

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The first Certified Professional Secretary examination was administered in August 1951. There were 281 candidates at 15 examination centers (today there are more than 250 exam centers worldwide).

Professional Secretaries Week (in 2000 renamed Administrative Professionals Week) was originated in 1952 and is sponsored annually by IAAP. It is observed the last full week in April with Wednesday set aside as Administrative Professionals Day.

The Articles of Incorporation were amended to establish an international status, and the first Chapter outside the continental United States or its territories was installed at Niagara Falls, Ontario, Canada, in 1954. Chapters were formed in Mexico City, 1959, and Helsinki, Finland, 1960, prior to the Bylaw Amendment in 1962 providing for affiliate status worldwide.

Members voted by mail referendum to change the name of the association in February 1981 to Professional Secretaries International (PSI), clarifying identity of the membership in a new decade for the professional secretary.

In July 1989 the Bylaws and Standing Rules were amended to provide full membership status to members located outside the United States, its territories, Puerto Rico, the Virgin Islands of the United States, or Canada. In 1992, these units became known as Chapters at large.

In 1994, PSI purchased the building and site of our present world headquarters offices in Ambassador Park, a business subdivision in Kansas City, Missouri. A building dedication ceremony was held on April 8, 1995.

At the 1995 International Convention in Seattle, Washington, delegates voted to approve a bylaws amendment that added "The Association for Office Professionals" as a tag line to the name of the association.

In August 1998, PSI member delegates at the 54th Annual Convention and Education Forum in Atlanta, GA, voted to change PSI's name to the International Association of Administrative Professionals (IAAP), to reflect more of the job titles being used today.

IAAP continues to provide education and training and set standards of excellence recognized by the business community on a global perspective. Our present and future vision is "to inspire and equip all administrative professionals to attain excellence."

NSA / PSI / IAAP Association Timeline

LEADERSHIP SKILLS

- 1942 – First Chapter of what soon becomes the National Secretaries Association (NSA) is founded in Topeka, Kansas, followed quickly by Chapters in Missouri, Oklahoma, Iowa, Nebraska, and Minnesota.
- 1946 – Two hundred members attended the first nationwide convention in Kansas City, Missouri. Delegates, drawn from 115 Chapters, approve the development of the Certified Professional Secretary program.
- 1950 – Merger with Secretaries International brings NSA 467 new members and a new project-building a home for retired secretaries.
- 1951 – Of 281 candidates, 62 pass a six-part examination and become the first recipients of the CPS rating.
- 1952 – U.S. Department of Commerce joins NSA in sponsoring the first National Secretaries Week (now Administrative Professionals' Week) to recognize "the secretary, upon whose skills, loyalty, and efficiency the function of business and government depend."
- 1954 – NSA goes international, with the first Chapter formed outside the continental United States in Niagara Falls, Ontario.
- 1958 – Creation of the Retirement Centers Trust.
- 1960 – NSA established Future Secretaries Association, a network of Chapters in high schools.
- 1964 – Asociacion de Secretarias Ejectivas de Panama becomes first foreign secretarial association to affiliate with NSA.
- 1966 – With \$100 seed money, the Research and Educational Foundation is created to fund projects that will "benefit the secretarial profession as well as the fields of business and education."
- 1967 – Convention delegates voted to open membership to men; first man joins six weeks later.
- 1971 – Language barriers fall as NSA offers the CPS examination in French in Canada and in Spanish in Puerto Rico.
- 1981 – Name changed to Professional Secretaries International.

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- 1987 – CPS program is restructured, requiring recipients to recertify their credentials every five years.
- 1988 – Entry-level Office Proficiency and Certification (OPAC) Program makes its debut.
- 1989 – PSI purchases land in Kansas City for potential headquarters. Bylaws and Standing Rules amended to provide full membership status to members outside North America and U.S. territories, with voting rights to International Associations.
- 1992 – PSI celebrates 50th Anniversary. First International Secretarial Summit held in New York City.
- 1995 – PSI purchases the building and site of our present world headquarters offices in Kansas City, Missouri. Building dedication ceremony held April 8, 1995. Convention delegates vote to approve a bylaws amendment that added "The Association for Office Professionals" as a tag line to the name of the association.
- 1998 – PSI changes its name to the International Association of Administrative Professionals (IAAP).
- 2000 – And beyond...IAAP continues to advance the secretarial/administrative support professional and promote professional excellence, with more than 40,000 members and affiliates worldwide.

Common Chapter Officer Positions

- President – Association ranking officer, presides at monthly meetings, appoints committees and chairmen, and disseminates all information to members.
- President-Elect – Learns and prepares to move into presidential role. Normally is assigned to chair particular committees such as budget and long range planning.
- Vice President – Can be association membership/liaison officer working closely on membership and public relations affairs of association.
- Secretary – Responsible for minutes, correspondence and records of association.
- Treasurer – Responsible for the financial bookkeeping of the association.
- Director – Advisory position to Board.

Division Positions

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- President – Presides at the Ohio Division Annual meeting and all meetings of the Board of Directors. Appoints standing and special committees as required during the term. Serves as ex-officio member of all committees except the Committee on Nominations. Serves as liaison between International and Division, keeping the Board of Directors and committee personnel apprised of pertinent letters, releases, etc. received from the International Director.
- President-Elect – Assists the President as requested. Perform the duties of the President in the absence of the President.
- Vice President – Assists the President and President-Elect. Coordinates the Annual Meeting. Prepare agendas and presides at any joint meetings with the Annual Meeting host Chapter. Updates the Annual Meeting Planning Manual.
- Recording Secretary – Serves as Secretary at the Annual Meeting and all meetings of the Board of Directors. Maintains and updates the Division History.
- Corresponding Secretary – Coordinates publication and distribution of the Division newsletter, *Buckeye Broadcaster*. Conducts correspondence as directed by the Board of Directors.
- Treasurer – Has custody of all funds and maintains the Division financial records. Makes disbursements by check, countersigned by the President or President-Elect. Submits a written monthly financial statement to the Board of Directors.
- Parliamentary Advisory – The Parliamentary Advisor is an ex-officio member of the Board of Directors and is appointed by the President. This position is responsible for providing assistance to the Division Board of Directors and Chapters at their request by clarifying actions to be taken throughout the year. Conducts the Delegates Briefing at the Annual Meeting. Assists the President in preparing to preside at the Annual Meeting.

District Position

- Great Lakes District Director – Serves as district representative on International Board of Directors. Presides over District Conference.

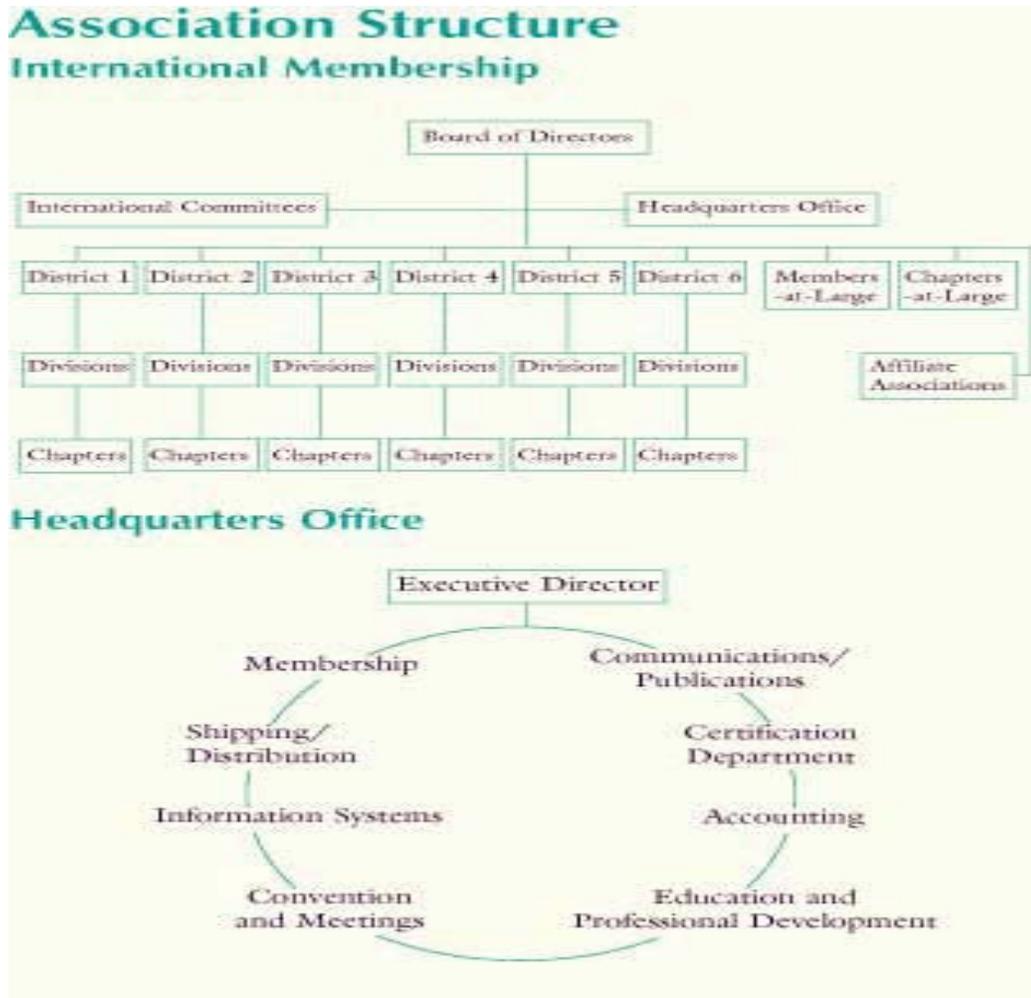
International Positions

- President
- President-Elect

LEADERSHIP SKILLS

- Vice President
- Secretary
- Treasurer
- Director, Great Lakes District
- Director, Northeast District
- Director, Northwest District
- Director, Southeast District
- Director, Southwest District
- Director, Danada District
- Affiliate Representative

Association Structure



LEADERSHIP SKILLS

SEE YOU IN HEAVEN!

A woman knocked at the Pearly Gates
Her face was lined and old
She stood before that man of fate
For admission to the fold.

"What have you done" the angel asked,
To gain admission here?"
"I've been a hard working secretary,
For many and many a year."

The Pearly Gates swung open wide.
The angel touched the bell.
"Come in and choose your harp," she said.
"You've had your share of hell."

Special thanks to Grange Insurance Companies for the printing of this Leadership Skills book!