

APA ACCOMPLISHMENTS

100 APA Accomplishments in the Last Year

Membership Services

1. APA membership grew to 23,240 by December 31, 2008, with a member retention rate of 84%.
2. The Certified Payroll Professional (CPP) designation was obtained by 961 individuals during 2008. Approximately 800 payroll professionals recertified through continuing education. Currently, more than 9,400 payroll professionals hold the CPP designation.
3. APA's Fundamental Payroll Certification (FPC) exam was successfully completed by 1,020 payroll practitioners. An additional 141 recertified through continuing education. Currently, more than 3,500 individuals hold the FPC designation.
4. More than 100 candidates took the FPC certification exam outside the U.S., with an overall pass rate of 83%.
5. APA now has 149 chapters. Five new chapters have affiliated since May 2008.
6. In recent months, 13 APA local chapters have celebrated their 25th anniversary.
7. Local Chapters facilitated a total of 164 CPP and FPC study groups in 2008 for the spring and fall certification testing windows. This reflects a 6% increase over 2007.
8. A record 10,000 members receive the daily APA Payroll ListServ, representing 43% of the total APA membership.
9. APA's website (americanpayroll.org) underwent several upgrades including a new web store, the addition of a new APA community section, and an enhanced chapter section.
10. To enhance the Chapter Leadership Seminars (CLS) in 2008, APA added a Friday afternoon of networking workshops for participants before the full day of training sessions on Saturday. In total, 78% of APA's local chapters have sent officers to the CLS.
11. Seventy-three chapters hosted a total of 35 statewide or regional conferences in 2008, representing a 20% increase in chapter participation in these educational events.
12. Many local chapters took advantage of the 2nd Annual Member-Get-a-Member National Membership Drive in the fall of 2008. Participation increased by 100% compared to 2007, and chapters increased their national and chapter memberships by as much as 10%.
13. APA completed its 9th Benchmarking/Performance Study, which allowed 120 employers to compare their practices and to identify areas for operational im-

provement. Results were released in the March 2009 issue of PAYTECH and to APA members at the 2009 Congress.

Education

14. APA's educational offerings in 2008 totaled 522 learning opportunities, covering 868 training days, encompassing 39 different programs or delivery methods, and enrolling more than 20,200 participants.
15. APA introduced two new online payroll education delivery methods, live and on demand webinars, 90-minute web-based seminars presented by payroll instructors.
16. A total of 760 participants took part in the two webinars on the American Recovery and Reinvestment Act, setting a new record for attendance at an APA webinar.
17. APA's Education division introduced Learning Paths, a free web-based tool that provides payroll professionals an informed way to build a cost-effective professional development plan that is tailored to them and their staff, based on their current jobs and career goals.
18. In addition to conducting APA's nationwide course offerings, APA instructors presented 93 other educational programs, including 25 chapter meetings, 43 statewide meetings, and 25 user-group meetings.
19. Over the past year, APA has presented 55 in-house programs of customized training to more than 1,400 payroll professionals.
20. APA's most popular training course, Preparing for Year-End and 2009, was offered in more than 85 one-day classes attended by nearly 6,000 participants. This fall will be APA's 26th consecutive year offering the Preparing for Year-End program.
21. APA presented in-depth payroll training to more than 800 participants at the Payroll Learning Centers in Las Vegas and San Antonio through The Foundations of Payroll Certificate Program, The Payroll Administration Certificate Program, Payroll Administration in Canada, Payroll Administration in the United Kingdom, Implementing Payroll Best Practices, and Payroll System Selection and Implementation courses.
22. APA presented Payroll Learning Center courses on the campus of the University of Nevada, Las Vegas using our new mobile computer-based classrooms while the construction of the new White House Las Vegas® at APA's MEET facility is in progress.
23. The San Antonio Payroll Learning Center expanded

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its educational capabilities by adding a new mobile computer-based classroom.

24. Beginning in early 2009, candidates for APA certification can sit for their respective exam after any session of the appropriate Payroll Learning Center class, not just during certification exam windows. The Foundations of Payroll Certificate Program pairs with the FPC exam while the Payroll Administration Certificate Program pairs with the CPP exam.
25. New for 2009, all students enrolled in the four courses of APA's payroll training progression receive two free payroll knowledge assessments which they take before and after the course to measure their gains in knowledge. This applies to Payroll Practice Essentials, Intermediate Payroll Concepts, Advanced Payroll Concepts, and Strategic Payroll Practices. This new education benefit represents an added value of \$39.90 to each registration.
26. APA continued the government presence at our classes by arranging for IRS and SSA personnel to make a brief presentation and answer questions at our Payroll Tax Forum and Preparing for Year-End classes.
27. APA's 26th Annual Congress in 2008, featuring more than 110 workshops and 142 exhibitors in the Exhibit Hall, recorded attendance exceeding 2,100.
28. APA's 2008 Educational Institutions Payroll Conference, geared to the higher education community, had 144 attendees, the highest attendance ever.
29. APA's 5th annual Capital Summit (Washington, DC, March 2009), which focuses on developing payroll legislative and regulatory issues, attracted its largest attendance ever, at 151 registrants. Organizations represented for the first time at any APA event included the IRS National Taxpayer Advocate, the Federation of Tax Administrators, and the Council on State Taxation.

Finance & Administration

30. Membership revenue was 21.5% of total APA revenue during 2008, a great contrast to many associations which derive as much as 85% of their operating revenue from membership dues.
31. Revenue related to membership increased by 8.7% during 2008.
32. Printing costs for PAYTECH, the Association's flagship publication, will be reduced by an estimated \$20,000 per year by contracting with a new printer.
33. Advertising revenue in 2008 for PAYTECH reached 100% of its goal.
34. In 2008, Vendor Relations achieved significant increases in sponsorship and event-related revenue. These gains

contributed to a 2.4% increase in Congress revenue.

These vendor investments allow the association to continue to offer enhanced services and products to members.

35. During 2008, sponsorships for APA's Paycard Portal increased by 54% over 2007.
36. Sponsorship of National Payroll Week 2008 grew by 5.7% over 2007.
37. During 2008, APA's Vendor Relations team created new relationships with 72 companies that were not previously APA advertisers, sponsors, or supporters, and 70 of APA's 171 existing client companies (41%) significantly increased their spending on advertising and sponsorships.
38. APA sold undeveloped property adjacent to its San Antonio facility, resulting in a net gain of \$874,000.
39. APA is in the final phase of construction of its new MEET facility in downtown Las Vegas, which will house The White House Las Vegas® Learning Center and a state-of-the-art exhibition facility. This continues APA's practice of owning its own facilities, which controls costs and allows the association to invest in future programs and services and focus on our core competency of providing world-class education.
40. APA's Accounting department has upgraded its financial systems to provide enhanced security controls and improved reporting flexibility.
41. APA has negotiated bundled plans for all its phone systems, providing an annual telecommunications savings of 10%.
42. Of APA's 82 employees, 21 have been with the association for 10-13 years and six employees have been on staff for more than 15 years.
43. APA hired a Director of Education Solutions to assess how APA's training solutions can meet the developing needs of our membership and to focus on other business development opportunities.

Government Relations

44. APA convinced IRS to suspend for tax year 2008 the statutory requirement to report on Form W-2 deferrals and earnings on deferrals under nonqualified deferred compensation plans, as no clear guidance had been issued.
45. APA convinced IRS to rule that educational institutions may continue to give their employees a choice of pay schedule, without that choice creating nonqualified deferred compensation.
46. Many of APA's suggestions have been incorporated in the new Form 941-X. The Government Affairs Task

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- Force (GATF) Federal Tax Forms and Publications subcommittee, chaired by Nora Daly, CPP, participated in focus-group testing of the form at the 2008 Congress, and further testing was conducted over the summer with APA chapters in Dallas, Denver, Jacksonville, and St. Louis.
47. At the suggestion of the GATF Federal Tax Forms and Publications subcommittee, IRS issued the advance release of the 2009 percentage-method withholding and Advance Earned Income Credit tables two weeks earlier than in the prior year, by leaving out the wage-bracket tables, so that employers, software developers, and service providers would have more time to reprogram their systems.
 48. At the suggestion of the GATF Federal Tax Forms and Publications subcommittee, IRS added to the 2009 Form W-4 a warning to employees that withholding may not be calculated as only a flat amount or as a percentage of wages.
 49. At the request of the GATF Immigration Subcommittee, chaired by Dave Fowler, the Department of Homeland Security has clarified that employers are not required to use E-Verify at all work locations, and DHS has provided guidance on what an employer should do if it does not meet the three-business-days deadline for entering a new hire's information into E-Verify.
 50. Years of APA efforts to help reform Pennsylvania local tax collection paid off when the governor signed a reform bill into law, reducing the number of tax collectors from 560 to 66, and allowing employers with a presence in multiple jurisdictions to remit all payments to a single tax collector.
 51. APA member Sam Kerch, CPP, CPA, completed his representation of APA on the IRS Information Reporting Program Advisory Committee (IRPAC). Kerch proposed the creation of a specialized W-4 for nonresident aliens, and IRS is currently considering the idea. APA member Emily Lindsay, CPA, was chosen by IRS to represent the payroll industry on IRPAC for the next three years.
 52. APA member Margaret Roark, CPP, completed her year as Chair of the IRS Advisory Council (IRSAC), which advises the Commissioner by offering constructive observations regarding current or proposed IRS programs. APA member Michael Casey, MAAT, EA, ATP, CPP, was chosen by IRS to represent the payroll industry on IRSAC for the next three years.
 53. APA member Jean-Philippe Choudhry was chosen by IRS to represent the payroll industry on the Electronic Tax Administration Advisory Committee (ETAAC) for the next three years. ETAAC submits an annual report to the U.S. Congress that reviews IRS's progress in increasing e-filing and that makes recommendations to accelerate the increase.
 54. The Paycard Subcommittee of the GATF, chaired by Cathy Beyda, Esq., continues to lobby state legislatures and regulatory agencies to allow employers to use payroll cards to pay unbanked employees.
 55. Members of the GATF Child Support and Garnishment Subcommittee worked with the Office of Child Support Enforcement to develop and perfect the electronic Income Withholding Order (e-IWO), which makes it possible for employers to receive orders and remit payments without touching a piece of paper.
 56. APA's GATF expanded its activities by creating an SSA Wage Reporting Redesign subcommittee. The new subcommittee will work with officials of the Social Security Administration as it plans to redesign the wage reporting process over the next few years.
 57. The APA convinced Congress and President Obama's Administration to deliver 2009 stimulus funds to taxpayers under the American Recovery and Reinvestment Act (ARRA) by changing the income tax withholding tables (as opposed to other, more burdensome proposals that were being considered). APA's input included a letter and video message from Executive Director Dan Maddux to President Obama.
 58. The APA ensured that employers would avoid cash-flow crunches and tax deposit penalties due to the COBRA-assistance provision under ARRA by convincing IRS to allow employers to reduce their tax deposits by the premiums they fronted and to apply the premium credit on the first day of a quarter.
 59. The APA continued to visit senators and representatives on Capitol Hill to promote the Child Support Protection Act, which would restore funding to state child support agencies. These efforts were rewarded when a temporary restoration of the funding was included in the ARRA.

Publications

60. APA transformed its printed educational catalog in 2008 into a new digital Portfolio of Education and Publications. The online, highly interactive portfolio features dynamic video components, easy search capability, and instant ordering.
61. Pay News Network (PNN), APA's webcast video news-magazine hosted by Executive Director Dan Maddux, evolved from a bimonthly schedule in 2008 to a monthly production effective January 2009.

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62. In 2009, APA began distributing occasional special editions of PNN, presenting breaking news to supplement the regular monthly webcast. The first special edition covered aspects of the American Recovery and Reinvestment Act.
 63. PayState Update, APA's biweekly state and local payroll compliance newsletter now in its 11th year of publication, migrated to a totally electronic format in 2009.
 64. PAYTECH Online has been streamlined to present more late-breaking news in a more condensed and easy-to-read format.
 65. The ninth edition of APA's Guide to State Payroll Laws was published in March. The book includes many new tables because the states were so active in many areas, including employment verification and paid family and sick leave.
 66. APA published the 16th edition of The Payroll Source®, the industry's leading reference book and CPP exam study tool, with a spring supplement that includes coverage of the American Recovery and Reinvestment Act.
- Public Relations**
67. During the period from May 1 to October 6, 2008, the APA delivered its messages to a total potential audience of more than 226.4 million. Coverage occurred in many magazines, websites, newspapers, and other media such as: CNN.com, Yahoo.com, SSA/IRS Reporter, and many others. (NOTE that this does not include NPW-related coverage).
 68. The 2008 National Payroll Week advertising campaign reached a total of 97.3 million people, up 210% from 31.4 million in 2007.
 69. APA created the first professionally produced television commercial for NPW. The 30-second spot aired on NBC's "The Today Show," CNN's "Anderson Cooper 360," and MSNBC's "Countdown with Keith Olbermann."
 70. For the third year, APA members went back to school to teach teens about their paychecks during Money Matters National Education Day, on NPW Thursday, September 4. A total of 624 members volunteered to train the next generation of America's workers.
 71. A total of 92 top businesses signed up to promote National Payroll Week. The 2008 NPW Supporters included Starbucks, Monster.com, Sprint, Marriott International, and Outback Steakhouse, among others.
 72. The 6th annual "Getting Paid In America" online survey, the cornerstone of the NPW media effort, received more than 45,000 responses in 2008. The survey's results provide valuable stats on key payroll-related issues and led to several high-profile media placements for the payroll industry.
 73. During National Payroll Week, the NPW website set a new record of 315,867 impressions, a 157% increase from the 123,100 impressions in 2007. For the entire campaign, the website registered 950,667 impressions, a 123% increase over the 426,249 impressions received during the same period in 2007.
 74. National Payroll Week was featured for more than three minutes on the nationally broadcast CBS television network morning show, "The Early Show." APA members, NPW Sponsors, APA staff, and the Dancing Paycheck mascot appeared prominently as special guests throughout the hour-long show, which reaches more than 2 million viewers.
 75. The largest daily newspaper in the United States, USA Today, ran two NPW Snapshots on the front page of its Money section, quoting two results from the NPW 2008 "Getting Paid In America" survey. The newspaper has a reach of 2.3 million per issue.
 76. State and local governments issued a total of 117 proclamations in support of NPW 2008. That's up 15.8% from the 2007 total of 101 proclamations. Local chapters secured 100 proclamations; APA secured 17.
 77. Two new companies were added as NPW sponsors for 2008, CyberShift and Workforce Software, for a total of 12 sponsors.
 78. The Wall Street Journal sought APA's expertise for its article on President Obama's stimulus package, "Unclear How Stimulus Will Dole Out Tax Relief." The story also appeared on Nasdaq.com, EasyBourse.com and Morning Star News for a potential reach of more than 5.5 million.
 79. APA's strong relationship with the Social Security Administration and the Internal Revenue Service was further evidenced in 2008 when the agencies asked APA to contribute multiple articles to every issue of the SSA/IRS Reporter, the joint newsletter of the two agencies. Combined, all four newsletters have a reach of 24 million readers.
 80. APA helped provide a wider audience for IRS video content. The APA published IRS tax-related videos on APA's Pay News Network YouTube channel, and the IRS linked directly to the videos from its website.
 81. The APA distributed a very successful news release on Form W-2 through the North American Precis Syndicate titled "Seven 'Must Do' Tips to Save Time and Money This Tax Season." This release generated 724 newspaper articles in 37 states with a readership of 55,846,224. In

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addition, it was viewed on the web by 7,568,802 unique visitors.

82. Leading benefits magazine *Benefits & Compensation Solutions* featured an article on 2009 payroll trends authored by APA Executive Director Dan Maddux in its February 2009 issue. The publication has a total circulation of 41,000.
83. CNN Money, a leading source for financial news, featured APA's Sr. Director of Publications and Government Relations, Michael O'Toole, Esq., prominently in its article "Worker Tax Cut May Be Slow in Coming." The article appeared first on CNN Money as the site's most popular story, and soon was posted by Yahoo! as one of its four featured stories for the day. In total, the story reached a potential audience of 131.9 million.
84. APA President, Emily Rook, CPP, and Scott Mezistrano, CPP, APA Senior Manager of Government Relations, attended the swearing-in of the new Commissioner of Internal Revenue, Douglas Shulman.

Partnerships

85. Since 2001, APA has partnered with The Canadian Payroll Association (CPA) to present U.S. payroll-training courses in Canada. In 2008, the APA presented 14 in-house programs with the CPA.
86. In 2008, APA President Emily Rook, CPP represented the APA as a speaker at the annual convention of the Canadian Payroll Association.
87. The APA partnered with the Institute of Payroll Professionals in the United Kingdom to present the first U.S. payroll training class, *Payroll Practice Essentials*, which was taught in London in June by APA President Emily Rook, CPP.
88. Executive Director Dan Maddux and APA President Emily Rook, CPP represented APA at the Institute of Payroll Professionals' 24th annual conference in Brighton, England on September 2-4, 2008.
89. APA President Emily Rook, CPP represented the APA at the Irish Payroll Association Conference (IPASS) in Dublin, Ireland on May 29, 2008, and Executive Director Dan Maddux represented the APA at the Irish Annual Payroll Awards Ceremony in Kildare, Ireland on October 30, 2008.
90. Together with ADP, APA presented a customized version of our *Preparing for Year-End and 2009* seminar for ADP's clients. This special course was presented 19 times across the U.S.
91. Staff promoted APA membership and the CPP and FPC certification programs at MasterTax User Group, ADP

- Meeting of the Minds, The Payroll Group Conference, Ceridian's TaxConnect Conference, Oklahoma Society of CPA's Spring Industry Conference, National Association of Computerized Tax Processors (NACTP) Annual Meeting, Western Interstate Child Support Enforcement Council (WICSEC) Conference, Convey User Conference, KronosWorks, Independent Payroll Provider Association (IPPA) Conference, and Sage Summit.
92. APA entered into an alliance with MasterCard to conduct the first Payroll Card Industry Survey and Benchmarking Study. This is in addition to MasterCard's Platinum sponsorship of NPW 2009.
93. APA entered into an alliance with The Hackett Group to conduct the annual Payroll Benchmarking/Performance Study. Early in 2009, this relationship was expanded to include an Accounts Payable Performance Study and a Workforce Management Performance Study.
94. A new Shared Services Task Force has been formed, the first joint task force composed of members of both the APA and the AAPA (American Accounts Payable Association).

American Accounts Payable Association (AAPA)

95. On November 1, 2008, the American Accounts Payable Association (AAPA) went "live," providing many benefits of membership: the website (americanAP.org), AP Journal Online, AP Answers (referral service for AP questions), Career Center, LinkedIn, and a Job Board. AAPA membership is more than 500 strong and growing!
96. Local AAPA chapters are being formed. The Washington Metropolitan Area Chapter is the first official chapter.
97. The AAPA produced its first Salary Survey for Accounts Payable Professionals. The results are being made available in several ways, including free at the AAPA Solution Center in the 2009 Congress exhibit hall.
98. The Strategic Accounts Payable Leadership Task Force developed the body of knowledge for a professional-level accounts payable exam and established the first accounts payable Certification Board.
99. CyberShift became the inaugural sponsor of the Accounts Payable Education Grant, offered through the American Accounts Payable Association and presented at the 2009 annual Congress.
100. The APA partnered with Jobing.com to list AP job openings in each issue of AP Journal Online, AAPA's biweekly membership publication, and on the AAPA website as a service to members.