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Inside AICPA, October 29, 1990

American Institute of Certified Public Accountants (AICPA)

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October 29, 1990

**Season
Opener**

The AICPA Basketball Team will open its 1990-1991 season tonight at 8:20 p.m. against Mutual of America. The Institute is coming off a fine 10-4 season, and will be shooting to make the playoffs for a second consecutive season, and the third time in the last four years.

The games are played at P.S. 111 (53rd Street between Ninth and Tenth Avenues), and spectators are welcome. Come out and cheer on the AICPA in its season opener.

New Hires

Maria Quesada - Clerk Typist - Collections. Maria joins the staff from Irving R. Boody & Co., Inc. where she was employed as a Data Entry/Bookkeeping Clerk.

Napoleon Reyes - Word Processing Operator - Text Processing. Formerly, Napoleon worked as a Lead Processing Operator for Schekter, Rishty, Goldstein & Beck.

Murray Schwartzberg - Technical Manager - Personal Financial Planning. Before joining the Institute, Murray was employed as a Tax Manager for Spicer & Oppenheim.

**Staff
Anniversaries**

Congratulations to the following staff members who last week celebrated various anniversaries with the Institute.

Anniversary

Johnnie Middleton	Receivables	20th
Mae Morrow	Membership Admin.	15th
Art Podorefsky	CPE Prog. Dev.-Tax	11th
Mickey Gallagher	CPE Operations Admin.	6th

**The Seven
Wonders Of
The AICPA**

Recently seven AICPA staff members have cashed in (for a total of \$11,000) on our referral bonus policy: Colleen Katz and Garnette Mullis, both in Journal of Accountancy; Cindy Kautz, in Human Resources; Stan Gorski, in Mail Services; Margie McDonald, in Office Facilities; Beth Ryan, in Secretarial Services; and Washa Wu, in Programming & Systems. You, too, can earn \$1,000 for a non-exempt and \$2,000 for an exempt employee referral hired and on the staff for six months. Just call Human Resources.

**Staff
Promotions**

Sandra Johnson, in Circulation was promoted from Lead Control Clerk to Senior Bookkeeper.

Preparing A Performance Appraisal

One of the primary goals in preparing for a performance appraisal is to move from an evaluation approach based on feelings, opinion and belief, to an appraisal based on fact and backed up by meaningful data. The key to a fact-based appraisal is preparation.

The first step in this approach is to assess the employee's job functions, decide which functions are the most critical and define which specific activities and responsibilities contribute to these functions. For example, some important functions listed on a secretary's goals & duties form are typing, answering the phone and filing. Critical position functions and job activities that support them can be classified into three categories: critical, very important and important. Omit from the appraisal other variables like personality and activities that are not aimed at important functions.

The next step in preparing the appraisal is gathering information. Review an employee's work plan and job description, and compare what should have been done with the actual results. Hopefully, notes, production reports and other records are available to back up the appraisal. It's important to avoid the tendency to start observing an employee the week before the appraisal meeting.

Identify critical incidents. These are situations where an employee has made an outstanding contribution or has experienced a failure when attempting to fulfill a critical, very important or important job function.

Review previous appraisals. This may be especially important if you are evaluating an employee who may be new in your department, and there are others in the organization who supervised the employee in the past. Read the previous evaluations, and also talk with the prior supervisor to find out how that person reached his conclusions, and ask for examples of what the employee did or did not do. Be wary of character or personality discussions; these are not appraisals. Also, the appraisal may be more accurate, if you get opinions from others who know the work of your employees. By having more than one perspective, you will avoid errors in judgment. According to John Lowrie, writing in **the Personnel Journal**, informal feedback can come from a customer complaint or compliment, or when other managers or supervisors casually mention that your employee did a good job or had a problem. When this occurs, place a note in the employee's file so that you remember these incidents at the time of the appraisal.