

How to Effectively Plan for Staff Vacations

As the weather gets nicer and temperatures rise, so do the vacation requests that land on your desk. But when several deserving members of your staff want the same days off this spring and summer, it can be difficult to determine how to grant the requests without jeopardizing your department's productivity.

For accounting and finance organizations, the challenge is compounded by key deadlines related to end-of-quarter financial reports. As a manager, this places added pressure on you to ensure you have enough people to handle the workload during the months when the second and third quarters end.

Following are scheduling suggestions to help you prepare for vacation season:

Develop a plan. Create a system for granting vacation requests, whether it's on a first-come-first-served basis, seniority or otherwise. Also, clearly communicate the dates when you'd like all hands on deck. In addition, if you haven't done so already, explain how much notice you'll require. Remember that the earlier you know which employees want to be out at what times, the sooner you can start crafting a game plan to maintain appropriate staff levels.

Delegate early. Determine which employees are best prepared to take over crucial responsibilities when your senior finance and accounting professionals are absent. Not only will this maintain workflow, it provides an opportunity to evaluate less-tenured workers as they take on new tasks and assignments. Their performance while pinch-hitting also can help you identify excellent up-and-coming candidates for higher-level positions that open up at your firm.

Consider interim support. Engaging temporary accounting and finance staff is another smart strategy for keeping critical projects on track. This approach is particularly helpful when your team is operating at maximum capacity and there are few options for reassigning portions of the workload.

Consider in advance what is needed for initiatives to progress when major players are on vacation and make arrangements for backup support from skilled project professionals. Doing so will keep productivity and morale high by taking some of the burden off your core staffers who remain in the office.

Finally, when it comes time to take your own vacation, trust your team. If you've made good hires, you have a staff of employees capable of making smart decisions and managing whatever issues may arise while you're relaxing and recharging.

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Accountemps is the world's first and largest staffing service specializing in the placement of accounting, finance and bookkeeping professionals. The company has more than 350 offices throughout North America, Europe, Australia and New Zealand, and offers online job search services at www.roberthalf.com.

MEMBER PROFILE LYNN BOSTER

Lynn Boster was born in the Andes Mountains of Peru in a town called La Orroya. She grew up in hot mining towns in Arizona and in San Francisco and Half Moon Bay, California, and graduated from Golden Gate University in San Francisco with a BA in Accounting. Masters? CPA license since?

Lynn loves to help people and believes accounting empowers them to make fact-based decisions about their past, present and future. Lynn likes to help people resolve their past by filing past due tax returns or preparing Profit & Loss statements for bankruptcy or divorce hearings. Her favorite activity is meeting with taxpayers at the end of the year to help them prepare their current tax returns. She also likes to help people plan for the future by considering the tax ramifications of actions such as buying a new house or office building, or changing careers, or setting money aside for a comfortable retirement.

Lynn has had the opportunity to work in Japan and Korea for Big Four firms, where she learned the process of "dual handling" - the preparation of tax returns in the foreign country and subsequent 'translation' into U.S. tax returns. She has also experienced the challenges of being a professional woman in these countries, and hopes that things will improve for her daughters' generation.

Lynn joined ASWA in San Francisco as a Student Member in 1982, and has been a member ever since, even while living overseas for over nine years. Says Lynn, "When I joined ASWA almost 25 years ago the group was made up of other women working in the Big 8 firms. They mentored me and gave me hope that I could have a career in accounting, and take care of myself and the family I wanted to have." Lynn maintains her ASWA membership with the hope she also can inspire women to believe in themselves and to respect what they can do for themselves. She especially wants them to consider being a CPA an option.

Says Lynn, "The biggest benefit I have from the contacts I have made through ASWA is the friends I have met along the way - other women working in the field of accounting who have met the challenges that life brings us; being the only woman in the room, marriage, divorce and cancer. Being a member of ASWA has helped me through both good and hard times."

Lynn lives in San Diego with her three daughters since moving here from Tokyo after 9-11. She likes the ethnic diversity in San Diego, the casual mood of the people and the mild weather. When not crunching out tax returns and financial statements, Lynn enjoys reading murder mysteries, studying California history and attending plays and ballets.



Membership News

ASWA Planning Meeting

Saturday, July 14th at 10:00 a.m.

at Kathy Culver's house
1890 Altozano Dr, El Cajon, CA 92020.
home phone: 619-562-8576.

All members are welcome to help
in the planning of our next year.



ASWA Mission Statement

ASWA is a not-for-profit membership organization with the purpose of enabling women in all fields of accounting to achieve their personal, professional and economic potential and to contribute to the future development of the profession.

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Robert Holf/Accountemps - La Jolla
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San Diego, CA 92121
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Membership Anniversaries !

JUNE

Dorothy Metzgar	6/1/1974	33 years!
Virginia Fellows	6/30/1984	23 years
Mary Erlenborn	6/3/1985	22 years
Lara Price	6/29/1998	9 years
Anna Arroyo	6/27/2002	5 years
Linda Perna	6/23/2005	2 years

Check out our web site for the latest information regarding meetings and ASWA San Diego:
www.aswasandiego.org

CALENDAR OF EVENTS

- Thurs. Public Relations Mixer - 5:30 p.m.
Jun. 21 Harry's Bar and American Grill
Induction of 2007-2008 Board of Directors
4370 La Jolla Village Dr, Ste 150
San Diego, CA 92122
858-373-1252
- Fri. Newsletter Deadline
Jun. 29 Please submit any news, announcements, articles or job opportunities to the editor at silvia_ward25@yahoo.com or by phone: 619-491-9446.
- Sat. Board Meeting - 10:00 a.m.
Jul. 14th Planning Meeting for 2007-2008
Kathy Culver's house
1890 Altozano Drive
El Cajon, CA 92020
619-562-8576

ASWA Member Survey

1. Which of the following ASWA membership benefits do you find most valuable?

- CPE
- Networking/contact with other professionals
- Information/resources about my profession
- Support of my profession
- Leadership opportunities

1. Which of the following ASWA membership services do you find most valuable?

- National Conference
- Regional Conference
- Web site www.aswa.org or www.aswasandiego.org
- Chapter meetings
- The Edge magazine

1. Please rate the value you place on your membership in ASWA.

- Highly valuable
- Valuable
- Somewhat valuable
- Not valuable – Why? _____

1. What is the best benefit your chapter provides?

- Meetings
- Opportunity to earn CPE
- Opportunity to meet other women accountants
- Leadership opportunities
- Networking
- Speakers and topics

1. What aspect of your chapter needs the most improvement?

- Attendance
- Participation
- Location of meetings
- Membership retention
- Membership recruitment of new and younger members
- Leadership
- CPE speakers and topics

1. Please select up to 3 CPE topics that you want to see in ASWA educational offerings. (please circle or highlight)

Accounting & auditing updates; Budgeting; Building and managing a practice; Coaching and teambuilding skills; Communication skills; Credit management; Developing an ethics program; Disaster recovery; Effective time management techniques; Estate planning; FASB updates; Federal Acquisition Regulation (FAR); Financial planning; Financial statement analysis; Forensic accounting; Fraud; Gender issues; Government accounting; Increasing productivity; strategically addressing project needs; Insurance; Internal control; Leadership skills; Managing your career; Managing through change; Marketing accounting services; Networking tactics; Nonprofit accounting; Operations analysis; Project management; Recruiting, hiring & managing employees; Retirement planning; Risk management; Sarbanes/Oxley; Software - accounting/financial; Succeeding as a new manager; Tax planning; Tax tips and tools; Tax updates; The art of effective interviewing; Work/life balance

7. Which of the following ASWA communications do you find the most valuable?

- The Edge magazine
- ASWA web site – www.aswa.org
- ASWA San Diego web site – www.aswasandiego.org
- Email alerts – National office
- Email alerts – San Diego chapter

8. What member tools and/or enhancements would you like to see added to ASWA San Diego's web site (www.aswasandiego.org)?

9. When would you most likely be interested in and able to attend member meetings?

- | | | | |
|------------------------------------|---------------|-----------|------------|
| <input type="checkbox"/> Monday | ___ Breakfast | ___ Lunch | ___ Dinner |
| <input type="checkbox"/> Tuesday | ___ Breakfast | ___ Lunch | ___ Dinner |
| <input type="checkbox"/> Wednesday | ___ Breakfast | ___ Lunch | ___ Dinner |
| <input type="checkbox"/> Thursday | ___ Breakfast | ___ Lunch | ___ Dinner |
| <input type="checkbox"/> Friday | ___ Breakfast | ___ Lunch | ___ Dinner |

10. Compare your current overall satisfaction with ASWA to your overall satisfaction two years ago. I am currently:

- More satisfied
- Less satisfied
- Unchanged
- N/A, I was not a member two years ago

11. Please offer any suggestions for improvement that would increase your overall satisfaction.

Please answer the following questions about your career (Optional)

13. Name

12. Company

13. Which level best describes your position?

(Senior executive (CEO, CFO, COO, etc.; Owner/Sole practitioner; Executive; Director; Manager; Associate; N/A – I am not employed)

15. How many years have you been a member of ASWA?

___ < 3 yrs. ___ 3-10 yrs. ___ 10+ yrs.

16. If you do not currently serve in a leadership position, are you interested in serving in the future? Please list any specific interest areas.
