



*“News from the Heartland”*  
**Mid West Society of Quality Assurance Newsletter**  
December 2008



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Please submit articles for the next newsletter by **March 31, 2009** to [editor@mwsqa.org](mailto:editor@mwsqa.org)



## **Presidential Ponderings**

Barbara Stephenson, Pfizer, Inc.  
President, MWSQA

We've had a great year. Tim Valley, Covance Laboratories, Inc. will be our President next year and I want to take this opportunity to pass him the "baton". Tim has had a productive year as our Vice President and Planning Committee Chair and I know he will enjoy his term as President.

Andrea Steed, Eli Lilly & Company, Nomination Committee Director has just submitted to you the 2009 MWSQA election ballot and proposed by-law changes. It was rewarding for Andrea to be able to submit a ballot with more people running for office than we can previously remember (three for VP, two for Secretary and five for two Director positions). Thanks to each person who is seeking election this year. Your support to our Chapter is what makes it so strong and vital.

As every year, we will have some members of our Board leaving. This year Andrea Steed, Janet Cunningham, Eli Lilly & Company, Audit Committee Director, and Jon Kreuger, Covance Laboratories Inc., Secretary, will be stepping down and helping with the transition of their elected replacements. I will miss each of you, and know that you will continue to actively support your Chapter in large and small ways.

Janet formed the audit committee this year by recruiting Joe Couch and Susan Moore, Eli Lilly & Company. The audit covered 2007 financial transactions, which was the first year that MWSQA's financial activities were facilitated through SQA Headquarters (HQ). Joe and Susan found a few minor errors which are being resolved by our Treasurer in conjunction with SQA HQ.

Jon Kreuger has served three Presidents and the BOD well over the last two and a half years. The BOD would not have functioned so seamlessly without his strong organizational skills. Who knew that the Secretary can assure the Board meetings actually accomplish something? The next Secretary will have a good template to follow.

I want to specifically draw attention to the end of Brian Mitchell's BOD membership. Brian has served as President, VP and Past President over the last three years. Brian has been successful as a Board member and I personally thank him for the value he has added to our Chapter. Brian was the Planning Committee Chair during the successful and profitable 15 year anniversary meeting in Indianapolis, November 2006. The 2006 meeting set the bar for successful meetings with 150 attendees and sufficient Sponsorship to entirely offset the cost of the meeting. This meeting was also the first regional Chapter meeting to be given in combination with the quarterly SQA meeting. I have been fortunate to have Brian as my mentor and friend over the last couple of years. The Board and I will miss Brian Mitchell.

Although we will be saying good-bye to some members of the BOD we will be fortunate to retain Wendi Godwin as Treasurer, Matt Foster, MPI Research, as Director of Membership and Jennifer Beech, Ricerca BioSciences, as Communications Director. As a side bar,

congratulations go to Wendi who delivered her third child in November. Mom and daughter are healthy and Wendi has managed to support our Chapter continuously before and after delivery.

The MWSQA chapter is again offering a scholarship to attend the SQA annual meeting in San Diego this year. Please see our website, <http://www.mwsqa.org/>, for details regarding scholarship application. The successful MWSQA member scholarship recipient will receive up to \$2000.00 to attend the SQA meeting next April. Just another advantage to MWSQA membership!

I want to thank the Board of Directors for making my year as President successful and fabulous! I have found being President of MWSQA a rewarding, growth opportunity. I recommend the experience to each of you.

As President, my ending message to every member of the MWSQA is to thank you for supporting MWSQA. Remember, our Chapter is only as good as the members who support it. Your support continues to make our Chapter successful.



## **MWSQA OFFERS 6<sup>th</sup> ANNUAL SCHOLARSHIP TO ATTEND SQA MEETING**

The purpose of this award is to help defray the registration and travel costs (a total of up to \$2,000) for a **MWSQA** member to attend the SQA meeting.

Potential recipients must meet the following requirements:

- **MWSQA** member with 2009 dues paid
- Be able to attend the 2009 SQA meeting April 19-24 in San Diego, California, USA.
- Submit the following:
  - A letter describing why you would like to attend the meeting and what you hope to gain from participating.
  - Curriculum Vitae to include current contact information and all past involvement in SQA/MWSQA (e.g., meeting attendance, committee participation, speaker, etc.).
- After attending the meeting, submit an article to be published in a future MWSQA Newsletter and/or posted to the MWSQA website regarding experiences and knowledge gained from attending the meeting.

Letters can be sent via fax, e-mail or US mail, but must be received by **February 27, 2009** in order to be considered. The Board of Directors will vote to select the winner. The winner will be announced early-March, 2009.

*Please send letters or direct questions to:*

Brian Mitchell – DC2632  
Lilly Corporate Center  
Indianapolis, IN 46285  
Ph: (317) 655-9258  
Fax: (317) 277-3150  
[bmitchell@lilly.com](mailto:bmitchell@lilly.com)

Notes:

Prior scholarship recipients are not eligible. Winning applicant must pay for expenses and receive reimbursement after attending the meeting. Receipts are required and reimbursement will be made as soon as possible following submittal of receipts. MWSQA will reimburse the winning applicant up to a total of \$2,000. The winning applicant is responsible for any expenses exceeding \$2,000.



## ***Final Audit Committee Report – 2008***

Janet Cunningham, Eli Lilly & Company  
Audit Director, MWSQA

The 2008 MWSQA Audit Committee was comprised of Janet Cunningham – Committee Chair, Joe Couch and Susan Moore (Elanco), all of Eli Lilly & Company, Indianapolis, IN. The audit committee conducted its review of the MWSQA Chapter's 2007 financial records in June and July 2008.

The audit consisted of reviewing the 2007 general ledger, bank statements, credit card and check deposit summaries, job posting and meeting sponsorship invoices, reimbursements and related receipts, payments, cancelled checks, for clarity, consistency, accuracy and completeness. Minor discrepancies were noted during the audit and have been discussed with the Chapter Treasurer. An SQA Headquarters representative provided copies of all MWSQA financial records in May of 2008.

Unless otherwise indicated the corrective actions taken will involve the Chapter Treasurer discussing and reconciling the discrepancies with the SQA Headquarters representative.

The following are the discrepancies:

1. An e-approval from the MWSQA board of directors was not found for payment (check #1001) to Epic Bistro for the 2007 summer MWSQA board of directors meeting. Corrective action - the MWSQA Board of Directors will be notified to determine if an approval exists and if not the MWSQA Board of Directors will determine a course of action. Also a receipt related to this charge was not found. Note: Two checks are numbered #1001. The other check is to SQA HQ.
2. The information on the deposit summary dated 06/28/2007 does not match the two cancelled checks dated 06/21/2007.

- The deposit summary indicates a total of \$970 was deposited from Company A, check #2880.
  - Two cancelled checks: #2880 from Company A of \$820 and #1132 from an individual for \$150 add up to \$970 however the information does not match the deposit summary.
  - In the Meeting Income Registration Fee section of the General Ledger, it appears the Company A payment was for three individuals which would be \$450.
  - As per the memo section of the cancelled check, the check also covers meeting registration for these three people at \$60 and a vendor table at \$250. This adds up to \$760. It appears Company A was refunded the remaining \$60 on 07/27/2007.
  - The meeting income section of the General Ledger indicates the Company A check #2880 was also for the same individual who submitted check #1132.
3. Invoice numbers 31, 36, 50 and 51 were not provided thus the amounts in the General Ledger were not verified.
  4. Invoice 47 does not show up in the records. It appears this number was skipped in the sequence however this could not be verified from the documentation provided.
  5. The Reconciliation Detail Reports for 12/31/06 and 01/31/2007 indicate two deposits on 01/05/2007 of \$120 and \$20. The second deposit does not appear on the General Ledger.
  6. The documentation does not indicate the purpose of the deposit of \$100 on 01/05/07 by an individual at Company D.
  7. Four members paid dues but do not appear on the membership listing.
    - A member paid dues on 04/19/2007 but does not appear in the membership listing.
    - A member paid dues on 05/01/2007 but does not appear in the membership listing.
    - A member paid dues on 02/07/2007 but does not appear in the membership listing.
    - A member paid dues on 02/07/2007 but does not appear in the membership listing.
  8. Company B submitted a check for \$180 on 06/20/2007. This appears to be for an individual as indicated in the deposit summary; however it's not clear what the money is for as registration was \$150 and membership was \$20.
  9. An individual submitted a check for \$175 on 07/11/2007. Not clear if this is for meeting registration and membership.
  10. Company C submitted a check for \$50, #13075 on 09/11/2007. One invoice is present dated 08/29/2007 for a website job posting at \$25. The documentation does not indicate the purpose of the remaining \$25.
  11. In the Receivable from SQA section of the General Ledger and the corresponding Deposit Summary, 17 individuals are listed on 01/11/2007 as paying membership dues by credit card which would total \$340 however the deposit is indicated as \$300. One of the 17 people is shown in the list as -20 which would account for \$20 however the documentation is not clear as to the reason for the refund. Documentation for the remaining \$20 not deposited does not appear to be present.
  12. A deposit summary for the AMEX 2-13 deposit on 02/13/2007 is not present in the documentation received from the SQA Headquarters representative.
  13. A total of 55 individuals are on the membership list but do not show payment of dues for 2007. Deferred dues from 2006 totaled \$1220 which would be for 61 individuals. Six people appear to have paid twice. Four refunds are indicated in the General Ledger. Two additional individuals are indicated as paying twice in the Audit Notes to the Audit Team from SQA HQ. As the names of the deferred individuals were not provided, the audit team could not verify if this description of events was correct.
  14. Several vendor tables are listed under Corporate Support in the General Ledger without amounts indicated and also under Exhibitor/Member Table in the General Ledger with amounts indicated. It's not clear the purpose of the partial double documentation.
  15. An invoice for the Company E deposit dated 06/01/2007 is not present in the documentation provided.
  16. Invoice 39 appears to be forgiven under Bad Credit in the General Ledger however it appears in the Website Advertising Sales section of the General Ledger as a \$25 receipt of payment.

The audit of the Chapter's 2008 financial records will be completed within the first half of 2009.

## ***Note from your Editor***

Dear Friends and Colleagues,

Can it really be that we have another year almost behind us? How quickly time flies! I appreciate the articles we have received from everyone and hope that 2009 is an even more fortunate year for authors and articles to keep this *your* newsletter a valuable and interesting resource.

Happy 'HollyDaze',  
Paula

Paula N. Wehmeyer, BASi  
Editor, *News from the Heartland*, MWSQA newsletter

**Thank You to All Who Contribute to Your Newsletter**

*Opinions are those of the authors and not necessarily those of MWSQA.  
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