



SFpayroll.org

San Francisco Bay Area Chapter
American Payroll Association

HISTORY OF SFBAC - APA (now PayrollOrg) 1983 - 2024

The San Francisco Bay Area Chapter of the American Payroll Association was founded in 1983. It was one of the first local chapters to be organized.

1983 and 1984

These were planning years for the Chapter.

1985 The Chapter membership had grown to 70 active members. The first annual Chapter Dinner was held in November.

1986 The Chapter held its first all-day meeting on Angel Island in June. It was co-sponsored by Golden Gate University. There were speakers from each government tax unit and Price Waterhouse. The first Members Handbooks (including the Chapter Networking Directory) were distributed to the members at this meeting. In a continuing effort to improve relations with government agencies, a new task force was formed called RAPPOR (Regulatory Agencies Payroll Professional Organizations Resolving Together).

1987 The first bi-annual California Payroll Conference was held in Monterey, CA, in September. At this conference, RAPPOR was formally introduced to the membership. Linda Melkonian was the Director of this successful conference.

1988 SFBAC APA, along with the other northern California chapters, hosted the National APA 6th Annual Congress held at the St. Francis Hotel.

1989 The Chapter continued to offer programs and workshops to the membership. The Chapter worked with Southern California APA chapters to plan their second bi-annual California Payroll Conference, held in Long Beach, CA. The Loma Prieta earthquake happened on October 17th.

1990 The first annual joint chapter meeting was held with members from SFBAC APA, Mid-Peninsula, South Bay, and Sacramento attending. The guest speaker was Richard J. Simmons.

1991 The third bi-annual California Payroll Conference was held in November. The Chapter helped make this conference a success. It was held in Napa, CA. The Chapter also organized a drive to collect toiletries and other personal grooming items to help the homeless. Members came together to package the items in gift bags and donated them to shelters in the Bay Area. At the 1991 9th Annual APA Congress, the SFBAC APA received an honorable mention for Chapter of the Year Award. At Congress, our own Nora Daly was named "Payroll Woman of the Year."

1992 The Chapter continued to provide information and support to its membership through speakers, workshops, and networking. The mission statement was presented to the membership, which read, in part, "to sustain chapter growth by continuing to provide timely and informative topics in a way which expands and enhances the payroll professional."

The Chapter, at the 10th Annual APA Congress, placed third for the Chapter of the Year Award. The August Chapter meeting was designated as Member Appreciation Day. The annual dinner was held in December.

1993 The Chapter, along with the other Northern California chapters, hosted the 11th Annual APA Congress in San Francisco. The Chapter won second place for the Chapter of the Year Award. Our President was Deborah Traylor with Pat McEntee as Vice President and Deborah Clement, as Treasurer. The highlight of the year was the 10th Anniversary meeting with Dan Maddux providing the opening remarks. We held a CPP Study group to help our membership obtain this accreditation. Melody Pasion was named Member of the Year for her overall contribution to the Chapter during 1993.

1994 Lynn Lew, was President, Lois Fried, Vice President, Darlene Martin, Secretary, and Melody Pasion, Treasurer. San Francisco hosted the 1994 Joint Bay Area Chapter Meeting with over 100 members attending. Lynn Lew relocated to Los Angeles and Lois stepped in as President for the remaining term of 1994-1995 with Melody Pasion taking over as Vice President and Ben Gallo as Treasurer. Membership Participation was the theme for 1994 and we again held a CPP Study group during the summer.

1995 We held two ½ day sessions plus four regular meetings and the Annual Awards dinner. Ben Gallo was awarded the 1995 Chapter member of the year. Some of our members worked on the board of the California Payroll Conference (CPC 5) held in Monterey in September. We had 14 people attend our CPP Study session during the summer.

1996 Chapter elections for 1996 – 1997 resulted in George Ozenne, President, Jerald Choy Vice President, Kay Woodward-Pappas, Secretary, and Ben Gallo, Treasurer. We had 10 members attended our CPP Study Group over the summer and NPW was celebrated with a ½ day session with the theme of “Bring Your Boss Day.” CPC5 was hosted by the Bay Area Chapters and was a smashing success with 110 people in attendance.

1997 Half-day breakfast meetings as well as regular meetings were popular in 1997. NPW was celebrated with a theme of “Bring Your HR person.” Elections were held for 1998-1999 Executive Committee members.

1998 Officers for 1998- 1999: Kay Pappas, President. Ben Gallo, Vice President, Melody Pasion, Secretary and Annabel Montout, Treasurer. San Francisco hosted the Joint Chapter meeting at the Palace Hotel with 110 attending. Our featured speaker was Richard Simmons, Esq., the well-known labor attorney.

1999 This year we had 36 people attend our CPP Study Group and Annabel Montout was designated as Member of the Year! We had our usual 2 half-day training sessions with regular meetings as well. The Chapter collected toiletries for the homeless and St. Anthony's distributed the items for us. The Holiday Dinner was held at the Fairmont even though San Francisco experienced a 5-hour blackout during the day. We were not sure if people would be frightened off by the blackout and were happy that 40 people found their way to our final meeting of the year.

2000 Officers for 2000-2001 were Kay Pappas, President, Melody Pasion, Vice President, Kate Steinkoenig, Secretary and Annabel Montout, Treasurer. We celebrated NPW at the Fairmont with a ½ day training session with everyone received a special SFBAC logo T-shirt to mark the occasion. Kay Pappas was presented with the Donald Sharper Award for her service & contribution to the chapter. We made up 200 basic toiletry packages for the homeless this year. Ben Gallo was named Member of the Year. And we continued our CPP Study Group during the summer.

2001 S.F. Chapter goes hi-tech and creates a web site. www.apaSFBAC.org. We also began distributing the bulletin via email. The Chapter By-laws were updated (before 1991) to reflect our current activities. Bill Schmale takes over as GLO as Nora Daly steps down after years of service to the chapter (thanks, Nora). We hosted our regular business meetings plus two-½ day training session, facilitated a 10-week CPP study group, supported and celebrated NPW by obtaining proclamations from the City of San Francisco and the State of California. Over 300 toiletry gift packs for the homeless were donated to St. Anthony's. Regina Lathrop was presented with the Donald Sharper Recognition for her service to the chapter. The World Trade Center bombings happened on 9/11.

2002 The elected officers for 2002-2003 were Kate Steinkoenig, President, Kate Brannigan, Secretary, and Annabel Montout, Treasurer. San Francisco kicked off the year by hosting the Joint Chapter meeting at the fabulous Fairmont Hotel with Ann Mahoney and Bill Brees as the principal speakers. Two other half-day training sessions were hosted as well as regular meetings. The chapter donated toiletry items again to St. Anthony's for our homeless project. The holiday meeting was a joint chapter meeting with the East Bay Chapter and held at the lovely Claremont Resort & Spa in Berkeley. CPC 8 was held at Lake Tahoe with close to 100 people in attendance. Again, San Francisco had members on the CPC8 board.

2003 We celebrated our 20th Anniversary as a Chapter. This great event included a Mayor's Proclamation recognizing our contribution to the payroll industry. Michael Hall, CPP, joined us from National, and our special guest speaker was Larry Wilde. Special thanks to Lois Fried for organizing the celebration "GOING STRONG...20 YEARS LONG!" Business meetings were typically held on Friday afternoons. Attendance skyrocketed with 40-50 people attending each session. And, at Congress, this year our own Deborah Traylor was named "Payroll Woman of the Year."

(History 1983-2003 documented by Lois Fried, CPP and Kay Pappas, CPP)

2004 Leslie Mortimer took over the reins as President, Carole Clausen served as Vice President, Darcee Bowers as Secretary and Annabel Montout continued as treasurer. Rob Cotterman, CPP and Lois Fried, CPP received the Joint Chapter President's Award. Rob, Chapter Education Chair, also organized, managed and hosted our successful CPP Study group (over 40 participants). The SFBAC joined the East Bay Chapter at their May meeting, which featured Patricia Fripp. Five SFBAC members won scholarships to the California Payroll Conference. They were Bill Schmale, CPP, Julie Ferrero-Schaefer, Becky Raiber, Monica Biscay and Ben Gallo. Joyce Sam, CPP, was the recipient of our APA National Congress scholarship. The September 10th, chapter meeting held at The Asia Foundation marked the celebration of National Payroll Week (NPW). The theme of this meeting was "bring your boss to lunch." The California Payroll Conference was held in Napa, CA, at the Napa Valley Marriott on September 23-24. Four SFBAC members served on the planning committee of CPC9. The chapter ended the year with the annual holiday party held at the L'Olivier, French Restaurant in San Francisco on December 10th. Rob organized, managed and hosted our successful CPP Study group (over 40 participants).

The chapter lost Past President, Kay Pappas, CPP. Members shared their memories of working with Kay. A scholarship was established in her memory. Kay's life and work will always be a part of the SFBAC chapter.

2005 President Mortimer and the Board made great strides to move our chapter forward by increasing membership and improving our website. We hosted well-attended chapter meetings covering an array of interesting topics. We found a new webmaster, Becky Ng. Becky ensured that all information was timely, easy to find, and informative. Becky added art to "spice up" the look of the site. Lastly, she updated several forms so that all members and potential members had access to correct information. The San Francisco Bay Area Chapter celebrated National Payroll Week by

sponsoring a 'Bring Your Boss to Lunch' meeting on Friday, September 9, 2005. The luncheon was hosted by chapter member, Annabel Montout of The Asia Foundation in San Francisco. Over fifty chapter members and guests attended the meeting! We received a proclamation from the City of San Francisco, Mayor Gavin Newsom. The chapter President and the President-elect, Rob Cotterman visited the charitable organization (Compass) that we support and talked about what we do. The members were asked to bring in used clothes and to donate money to the charity. The members gathered at the beautiful Atrium Restaurant in downtown San Francisco on December 13, 2005 to celebrate the season and close out the year. The members shared a delicious meal, great conversation, super door prizes, and accolades given out to all the volunteers who gave so much to the chapter all year

2006 President Cotterman held the annual Board planning meeting at his office in San Francisco on Jan. 7, 2006. The meeting dates and locations were planned for the year. Our membership grew to over 170 during this year. Thanks to all of the hard work from membership chair, Leslie Mortimer. The NPW planning committee put on another fantastic celebration held on Sept. 6, 2006, at the Mijita Restaurant in the San Francisco Ferry Building. We ended the year with a spectacular holiday dinner celebration and raffle held in the Carnelian Room in San Francisco on December 7, 2006. President – Elect, Jerry Ajlouny will be taking over the reign in 2007.

2007 President Ajlouny, CPP kicked off the year with the annual Board meeting on January 20, 2007. The first meeting of the year covered the new SF Sick Leave Ordinance. Geri Rosaria won the Chapter Scholarship to the 25th Annual APA Congress. Our chapter hosted the Joint Chapter meeting on June 15, 2007 at the Hyatt Regency. Outstanding attendance! We celebrated National Payroll Week on September 5, 2007 at SF City Hall. Ben Gallo, CPP arranged a tour of City Hall that was enjoyed by all of the members. Our own Nora Daly, CPP spoke at the October meeting on California issues. The holiday party was held on December 6, 2007 at Scala's Bistro. Jerry passed the gavel to Joyce Sam, CPP for 2008.

2008 President Joyce Sam called her Board together for the planning meeting on January 12, 2008 at McKesson. The Board selected several popular topics for the upcoming meetings (i.e., SF Healthcare/Update on Sick Pay, Local Taxes/Social Security Update). On April 23, 2008, members of the SFBAC APA Chapter attended the Joint Chapter Meeting in San Jose. The chapter's 25th anniversary was held at PG&E on June 16, 2008. Seventy-five past and present members attended. The NPW (National Payroll Week) meeting was held at the Asia Foundation, on September 5, 2008. Several chapter members volunteered to work on the CPC11 Board. Chapter member, Marcella McCarthy, CPP was Director, Ben Gallo, Hotels and Lois Fried, CPP, Co – Director. The members ended the year coming together for a wonderful year-end celebration at L'Olivier. President Sam passed the gavel to Edwin Castro, CPP!

2009 The Board meeting was held last January 10th at McKesson. There will be a joint chapter meeting with the East Bay Chapter this year. The first meeting is scheduled for March 26th at Sephora. All of the students who made their commitment to attend the CPP Study Group graduated on March 17, 2009. Many thanks to Education Chair, Erin Lombardy, CPP, who facilitated the study group. The members enjoyed the meetings on Expat Payroll and COBRA Subsidy, Pay Cards, Legislation update, Wage & Hour and Year End Updates. The chapter's membership fee structure was reworked by the Board in 2009. Over 55 members and guests enjoyed a lovely year end celebration at Il Fornaio on December 3. President Castro, CPP happily passed the gavel to Shawnine Eaglin, CPP who will lead the chapter in 2010.

2010 Chapter member, Shawnine Eaglin, CPP, took over the leadership of the chapter in January. Her vision for the chapter was to increase member involvement through continued education and community service. President Eaglin announced the campaign of "Hearts Go Out to Haiti" by donating 20% of all paid membership dues received by February 14, 2010. She happily announced at the February meeting that we were able to donate \$970 to assist the American Red Cross Relief Efforts in Haiti! Four scholarships were awarded to chapter members to attend the California Payroll Conference 12 in October! Chapter members participated in NPW by distributing over 1000 fliers at

the downtown BART (Bay Area Rapid Transit) system for commuters. They informed the commuters about the APA and NPW. Thanks to Erin Svoboda, CPP for coordinating this successful event! The chapter ended the year with an awesome holiday meeting at restaurant Il Fornaio on December 2, 2010. President Eaglin passed the gavel to President-Elect Erin Svoboda, CPP who will lead the chapter in 2011.

2011 – President Svoboda acknowledged the super work done by past president Eaglin Mwesige and Becky Ng, chapter webmaster, to give the chapter's website a new and improved look. President Svoboda introduced the membership to Cvent, a software program where members were able to RSVP to meetings and much more. Members were able to pay for membership, events, and study groups via Pay Pal. Another ten-week study group (starting in June) was offered to the members to prepare them to sit for the FPC and CPP exams. Many SFBAC members traveled to Vacaville to participate in the Northern California Joint Chapter meeting. The SFBAC was well represented in May at the 29th Annual APA Congress in Salt Lake City. The members participated in National Payroll Week (NPW) in September by attending a breakfast event held at the Marriott in Union Square. The Chapter won **1st place** in the APA NPW Chapter Photo contest for 2011! At this meeting, two attendees won a paid registration to the California Payroll Conference in 2012 and to the APA Congress in 2012! The members ended the year by enjoying a lovely holiday event at the Marriott San Francisco in December and we collected over \$350 in donations for Shelter Network. President Svoboda thanked the Board and members who volunteered, presented at meetings and supported the chapter throughout the year. President Erin introduced Miriam Cabuco as the new SFBAC president for 2012.

2012 – President Cabuco continued to work on the new Cvent software program to make it user friendly for the members. Another ten-week study group was formed for 2012. Dorothy Farmer, CPP volunteered to lead the group. The chapter partnered with the San Francisco Mayor's Office to host a social event on May 31 at the Thirsty Bear Restaurant & Bar to highlight the month of May as direct deposit month in San Francisco. SFBAC member Pam Jones was the winner of a paid registration to the APA 30th Annual Congress in Orlando. 2012 was a winning year for the chapter! The APA awarded an honorable mention for 2012 Chapter of the Year and Best Chapter Website. National Payroll Week was celebrated at member Jerry Ajlouny's workplace of Charles Schwab in San Francisco. Stacy Shamberger, EVP of the Skyline Group, presented on Professional Development. SFBAC members served lunch to the homeless at Glide Memorial Church in a gracious act of community service. During National Payroll Week, the chapter also announced that retiring Board member, Annabel Montout won the paid registration to the APA 31st Annual Congress that would be held in Grapevine, TX in 2013. The members ended the year with a holiday celebration at Buca De Bepo in San Francisco. The chapter members donated \$350.00 to Shelter Network of San Francisco. President Cabuco will continue another great year of leadership in 2013.

2013 – President Cabuco led the chapter through another year of learning and growth. The Chapter celebrated NPW and its Thirtieth Anniversary on September 6, 2013 at Sephora. We were honored to have several Past Presidents join NPW and the anniversary celebration. The new Board was put in place for the upcoming year with Owhen Astorga of Salesforce as President. A holiday donation was made to Shelter Network from the generous raffle played by the members at the annual holiday meeting.

2014 – President Astorga kicked off the year with a planning meeting of the Board. Several SFBAC Chapter members joined the California Payroll Conference Board (CPC) that was held at the Hyatt in Santa Clara in September. The chapter held a successful Study Group for members preparing to take the CPP exam in the Fall. The chapter membership is over 150! Guest speakers volunteered their time to bring the chapter members relevant workshops covering many of the hot topics of 2014. The chapter was excited and proud to have a founding member elected as APA President for a second term, President Deborah-Viers Traylor!! The annual holiday event was held at the famous Tonga Room. Lois Fried delivered the annual holiday donation to Shelter Network on behalf of the chapter. President Astorga was elected for another term!

2015 – President Astorga held the annual SFBAC planning meeting in January. She solicited topics of interest from the membership and asked all to provide keynote speakers who would volunteer to lead workshops. Board members agreed to participate in the summer study group by covering a chapter in the Payroll Source to prepare our members to sit for the fall exam. It was an amazing success! A large contingent of SFBAC Chapter members attended the 33rd Annual APA Congress. The chapter took 3rd place in the 2015 Chapter Pictorial!!! Brent Gow, the APA Past President, was the guest speaker for NPW.

2016 – President Astorga was elected and continued as President for 2016. Regular Board meetings were planned for the year. McKesson and Salesforce provided meeting space. Several Chapter members traveled to Nashville to the 34th Annual APA Congress. The chapter took 2nd place in the Chapter Pictorial Contest and participated in the Traveling Emojis Contest. President Astorga was on Team Globewinkers – which won the Grand Prize at Congress. Stacy Shamberger was the keynote for NPW held on September 9, 2016 at Salesforce. The members enjoyed a great buffet and of course a beautifully decorated NPW cake. Bill Schmalle delivered his year-end and what's new for 2017 workshop to the members in November. The annual holiday dinner was held on December 1, 2016. Salesforce provided the space which was decorated and filled with vendor gifts, lots of great food and refreshments!

2017 – President Astorga is continuing in the leadership role of SFBAC President! The Board members have all agreed to stay in their positions for 2017. Great meetings have been planned for the remainder of the year. McKesson and Salesforce will provide meeting space. Chapter members traveled to Orlando to the 35th Annual Congress. The chapter walked away from Congress with Best Statewide Meeting, Chapter Pictorial, and Chapter of the Year honorable mention awards!!!! National Payroll Week welcomed an IRS Auditor who gave great tips to the payroll pros. President shared a slide presentation thanking the many sponsors who support the chapter during the year. Many gifts and prizes were handed out to the excited members! The chapter won the NPW 2017 Chapter Photo Award under the Innovator contest. The Chapter members attended the CPC on October 12 – 13, 2017. Government Liaison Officer, Bill Schmalle, presented tax law changes for 2018 at the annual holiday event.

2018 - President Astorga held the planning meeting on January 20, 2018. Mindy Mayo, Principal at Ryan, LLC presented on Tax Reform and Payroll at the February meeting held at McKesson. The APA Annual Congress was held in National Harbor, MD. Several chapter members attended. Chapter members led workshops and volunteered many hours during the Congress. The chapter won Chapter Pictorial, Best Statewide, Chapter Photo, and Chapter of the Year Gavel awards. This year, as in many years past, the Chapter awarded members with scholarships to attend the APA Congress and the CPC. Several members attended the Leadership Conference sponsored by the APA. The chapter continued to find ways to serve the community through charitable contributions at the annual holiday event. President Astorga is continuing to serve as President for 2019.

2019 – President Astorga held the planning meeting in January. The Chapter members were excited to know that the APA 37th Annual Congress would be held in Long Beach, giving many the opportunity to attend. Chapter member Lois Fried will be the President-Elect for 2019 and will be sworn in May of 2020. Congratulations! The Study group plans are underway for the summer. The chapter undated its logo and website! APA member and APA Speaker, Ron Moser will give the keynote presentation for NPW! The chapter welcomed speakers to present topics of interest to the members. Study Group plans got underway at the planning meeting. A new charity organization was chosen, George Marks Children's Hospital. The year ended with the annual holiday dinner, charity raffle, and many giveaway gifts.

2020 – President Astorga kicked off the year with the planning meeting. The Chapter Board was busy working on the APA Chapter Contest requirements. A virus called COVID-19 hit our shores and changed the landscape for the rest of the year and beyond. The payroll community stepped up and transitioned to working from home. The APA switched all classes, meetings, and conferences to virtual, as did the SFBAC. The platform used by the majority was ZOOM. President Astorga and the

Board have continued to offer the membership great workshops, meetings, and fun events in the ZOOM virtual environment.

2021 President Astorga led us through another year of COVID with professionalism, grace and loads of fun! She started the year 2021 with a state of the chapter address and asked all members to remain strong and hopeful. George Mavrantzas, VP of Strategy and Thought Leadership at ADP joined us in April to talk about the Evolution of Pay. His presentation was informative and well received by the members!!

We held a successful 2021 Study Group Series in the summer led by professional and talented Payroll Professionals in the San Francisco Bay Area! Bill Schmalle, CPP Christine Stolpe, CPP Edwin Castro, CPP Lois Fried, CPP Marcela McCarthy, CPP Rohini Lal, CPP shared knowledge to help payroll professionals prepare to take the FPC/CPP upcoming exams!

Our first ever Virtual Round Table Discussion was held in 2021! Panelists Brenda Plechaty, CPP - Edwin Castro, CPP, and Lois Fried, CPP shared their different insights on an interesting topic: "Challenges, Strategies and Best Practices During the Covid-19 Pandemic." Many thanks to our Moderator, Henry Astorga as well!

Keynote speaker Michael Baer CPP - Special Advisor at DailyPay, joined us for NPW celebration on Friday, September 10, 2021, to talk to us about "How Payroll and HR Can Work to Resolve Modern Employment Challenges". Michael spoke about new Payroll and Human Resources initiatives that employers are undertaking to comply with the new work requirements. It was an educational and fun-filled day with exciting prizes won by all!

Some of the SFBAC members represented the chapter by attending the California Payroll Conference held in October at Newport Beach, CA. Marcela McCarthy, CPP and Deborah Viers Traylor, CPP lead the November Chapter Presentation and Round Table Discussion on the "Principles of Project Planning and Implementation." Bill Schmalle, CPP did a marvelous job in moderating the successful event!

Bill Schmalle, CPP, kept the members up to date on all legislative changes, federal, state and local throughout the year. The chapter won many APA awards during 2021 and ended the year with a fun holiday virtual event. Looking forward to 2022!

2022 – Payroll Professionals faced another challenging year but with the strength and resilience of our President, Board of Directors and faithful members, we persevered. President Astorga thanked everyone for continuing to complete payroll timely and efficiently, reporting, paying and filing taxes on time, and completing projects, simple and complicated, when they were due. She encouraged the members to continue to be the best payroll professionals, ever.

The APA Payroll Congress held May 10-13, 2022, returned to an in-person event in Las Vegas, NV! Many members attended and good times were had by all. Our own Lois Fried, CPP closed out her APA Presidency with a dance routine with President Bruce Phipps, CPP in a fast-paced dance on stage to the enjoyment of everyone! Our local celebrity, Patricia Fripp, was awarded the inaugural Partner of Excellence Award.

Lois also represented the APA at the National Payroll Institute (formerly CPA) in Niagara Falls, ca on June 8-10, 2022. Lois was part of an Executive Panel discussion about remote work and cross-border employment trends and the new work normal. She enjoyed the workshops, keynote speakers and meeting the NPI Board and members.

The SFBAC members were thrilled to have our own local Hall of Fame keynote speaker, Patricia Fripp join us virtually to share her expertise with a group of spellbound attendees for National Payroll Week, (NPW) 2022! The theme was " Building Blocks to Confidence and Career Success." Patricia's presentation was entertaining, action-packed and content rich!!

Many SFBAC members attended the California Payroll Conference (CPC) 2022, held in-person in Oakland, CA! Our members showed up in BIG numbers! President Astorga, and other members led workshops and recruited new members to our chapter.

There was an exciting line-up of workshops to expand the attendees payroll knowledge and position them as future payroll leaders. The networking opportunities were many to connect with payroll industry experts! The vendor expo displayed the best, cutting edge products in the payroll market.

The attendees had the opportunity to gain direct access to payroll service providers where they could get answers to their questions.

The chapter continued to provide outstanding virtual meetings with informative and relevant topics, keeping pace with the changing industry. Bill Schmalle, CPP, Government Liaison Chair, continued to provide up to date tax law changes throughout 2022 and prepared us for the changes coming up for 2023!! The Board welcomed Iris Yu to the Board in the new position of Communications Officer!

2023 – The Board had their in-person planning meeting (post Covid) in February to plan 2023. They enjoyed a wonderful continental breakfast at Historian Lois Fried's clubhouse. The year kicks off with a roundtable discussion about Year-end! Chapter members shared their successes and challenges and how they learned new and exciting ways to manage tough projects with professionalism and joy! President Astorga started the year asking us to take time to meditate and think about the things we were grateful for. She shared how music and dance helped her to get through year-end and life's situations. We were fortunate to have great speakers join our virtual meetings and share useful information and resources throughout the year!

The SFBAC Board met in March to discuss changing the vendor (from Cvent) for our website and membership management. StarChapter (used by many APA Chapters) is a member association management software company serving local chapters of professional and trade associations in the United States and Canada. StarChapter's mission is to help local leaders grow their chapter's attendance, membership, and revenue. The software combines event registration, membership management, email marketing, responsive website layouts, web services, and eCommerce tools. Many members attended the Annual Payroll Congress held May 16-19, 2023 in Denver, CO. The theme was Art and Science of Payroll. As usual, the chapter participated in many contests and received awards for the hard work and dedication put in by the members. The Congress lineup of workshops provided many choices from leadership to the future of AI and robotics in the payroll and HR industry. The vendor hall was jam-packed with professionals waiting to share the latest and greatest in technological advances since the last Congress!

The American Payroll Association (APA), was rebranded to PayrollOrg (PAYO) in May of 2023, combining the APA and Global Payroll Management Institute under the new brand.

Many members traveled to Anaheim, CA to attend the California Payroll Conference held from October 11-13, 2023. Learning and networking opportunities were offered to the attendees along with outstanding keynote speakers bringing motivational topics to the group.

SFBAC member Edwin Castro, CPP led a presentation called, "Now that you have processed payroll, what is next?" Edwin's presentation was lively and filled with solid tips and tools that the members could use.

We were excited to have "That Payroll Guy" Gerard Hall, CPP join us virtually during National Payroll Week (NPW), September 4-8, 2023! Gerard led a session about "the Joys and Pains of Being a Payroll Superhero." He helped us understand what we needed to manage the daily challenges of the wild world of payroll. He pointed out our superpowers and how to watch out for "kryptonite" that could cause us to stumble along the payroll journey.

Government Liaison, Bill Schmalle, CPP brought everyone up to date on the tax changes effective for tax year 2024 at the December 2023 meeting. The Board has been busy with the implementation of StarChapter! Board member, Darcy French has taken the lead on this project and is moving it along to meet the transition date from Cvent to StarChapter in February of 2024. The Board applauds Darcy's effort to keep this project on track! We continued with virtual meetings throughout 2023, but President Astorga kept everyone engaged and having fun by playing games, winning prizes, and spotlighting new members. She is excited that we are planning a few in-person meetings for 2024! The Board's annual planning meeting is set for February 10, 2024!

2024—The Board met at Lois' clubhouse to plan the year and catch up with each other. They enjoyed a delicious breakfast and lunch together and took a nice walk on the lagoon.

We planned out the year and reviewed the budget. We continued to work on implementing the website to Star Chapter, which was completed in March 2024. Many thanks to Darcy French, CPP, for working so diligently on this project.

The monthly chapter meetings are the highlight of the chapter. The members attend in big numbers, seeking answers to their legislative and compliance issues. The conversations and discussions among the members enhance the meetings and make for great sessions.

We worked jointly with the South Bay and Central Coast Chapters to create a successful study group with nine students. The study group ran for four Saturdays for eight hours. Thanks go out to Ann, Owhen, Lois, Bill, Craig, Edwin, and Carlo for facilitating the classes. We had eight members sign up for the study group.

We participated in PayrollOrg 41st Congress in Nashville with six members attending. We brought home awards from the PayrollOrg yearly contests.

The Board planned a lovely NPW/40th Chapter Anniversary, held in person at KPMG in San Francisco! We had good attendance, games, good food, desserts, and a wonderful presentation from KPMG on Emotional Intelligence. Proclamations from several cities were read. Two of the founding members, (Phyllis Brown and Cynthia Coats) were in attendance.

Several members attended the California Payroll Conference in Sacramento in 2024.

President Astorga will continue to lead the chapter in 2025 with an eager and enthusiastic Board.

(Chapter History 2004 – Present documented by Lois Fried, CPP)

San Francisco Bay Area Chapter, website: sfpayroll.org

PayrollOrg PAYO (formally APA) Rebranded May, 2023

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An autonomous and independent chapter of PayrollOrg (formerly American Payroll Association)