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As another chapter year has come to an end, I want to start out by thanking the Officers, Board of Governors, and Volunteers for all of their contributions to the Chapter this past year in the face of the many challenges brought on by the pandemic. It was certainly a year unlike any other and one that we won’t soon forget! Despite these challenges, I am proud of the many accomplishments of the Chapter this past year and believe that a lot of positive change was made that will serve the Chapter in future years.

I am happy to report that the Chapter maintained its Gold status through the IIA’s Chapter Achievement Program, which recognizes chapter activities that align with the North American Strategic Plan. Please review the remaining sections of our Annual Report for more information about the Chapter’s achievements this past year.

I would also like to take this opportunity to thank our Officers, Board of Governors, and Members for allowing me to serve as President this past year. I am truly honored to have been given this opportunity to lead and serve the Central Penn Chapter. I am happy and excited to transition to a new role on the Board where I’ll be able to continue to support and serve the chapter during the upcoming year.

Best wishes for a safe, healthy, and happy summer! I look forward to “seeing” everyone in the new year!

Best Regards,

Jennifer Smith
2020-2021 IIA Central Penn Chapter President
jsmith@riteaid.com
Member Information

2020-21 Membership Survey Results

- Preferred learning method: webcast or in-person
- For webcasts, the preferred length of the webinar is two hours
- Most members choose to attend a Central Penn continuing education based on topic
- Topics of interest to Central Penn members: technology auditing, data & analytics, agile auditing, cryptocurrency, ransomware, and round tables

Member Information

- Total members as of 5/31/2021: 303
- Newly certified Central Penn members in 2020-21 chapter year: seven Certified Internal Auditors (CIAs), one Certified Financial Services Auditor (CFSA), and one Certification in Risk Management Assurance (CRMA)
- 12 of Board of Governors Members and one Registrar

Congratulations!

CIAs: Lynnanne Bocchi, Meghan Elliott, Kelly Fazal, Shona Frain, Heather Hirschmann, Andrew Loyack, & Jill Mellon
CFSA: Jason Kline
CRMA: Diane Rudy
Chapter Achievement Program

The Chapter Achievement Program (CAP) is an achievement/recognition program for chapters that uses points to recognize chapter activities that align with the North American Strategic Plan in four service categories: Programming, Certifications, Advocacy, and Membership.

Central Penn status: GOLD

CAP Achievement Levels:
- Bronze: on-time completion of chapter health
- Silver: on-time completion of chapter health + additional activities
- Gold: on-time completion of chapter health + Silver + additional activities
- Platinum: ten of 11 years of Gold achievement
- Ruby: 20 years of Gold achievement
- Sapphire: 25 years of Gold achievement
- Diamond: 35 years of Gold achievement

Gold status achievements:
- **Programming**
  - Adapted to virtual training platform for chapter programming events throughout the year
  - offered 6 free training events to members, offering 11 free CPE
  - Advertised CPE events sponsored by other chapters and/or companies to chapter members to provide additional CPE opportunities

Certifications
- Recognized IIA certification recipients via the Chapter website and through individual communications from the Officers/Board of Governors
- achieved a 3% certification growth rate

Advocacy
- Promoted Internal Audit Awareness Month via the Chapter website and other venues

Membership
- Maintained an 85% membership retention rate for the 2020-21 chapter year
- Member Satisfaction survey showed an overall satisfaction rate of 88.5%
CHAPTER
FINANCES

CENTRAL PENN CHAPTER
INSTITUTE OF INTERNAL AUDITORS
TREASURER'S REPORT AS OF 5/31/21

Checking Account:
Beginning Balance 05/01/21 $26,319.61
Less: Expenses
Plus: Deposits
Plus: Dividends $1.13
Ending Balance 05/31/21 $26,320.74

Savings Account:
Beginning Balance 05/01/21 $25.00
Ending Balance 05/31/21 $25.00

Money Management:
Beginning Balance 05/01/21 $203.44
Plus: Dividends $0.01
Ending Balance 05/31/21 $203.45

Certificate Accounts:
Beginning Balance 05/01/21 $21,210.15
Plus: Dividends $10.77
Ending Balance 05/31/21 $21,220.92

TOTAL BALANCE ALL FUNDS $47,770.11
2020-21 Chapter Events

October 2020
- Governance & Audit Committee Best Practices 2 CPEs

November 2020
- Cybersecurity Auditing & Digital Forensic Auditing, 2 CPEs

February 2021
- Building Secure Network Architecture, 1 CPE

March 2021
- Being Agile in Addressing Risk: Internal Audit's Call to Action, 2 CPEs

April 2021
- Ethics, Forensic Accounting, and Fraud Wars, 2 CPEs

May 2021
- Auditing Beyond the Numbers & Vendor Management, 2 CPEs
If you are interested in a new opportunity to become more involved with your local IIA Chapter, you can send an email to Chapter88@iiachapters.org or contact a current officer or member of the Board of Governors directly.
2020-21 Chapter Leadership

Board of Governors

Stephanie Kohr
Governor
Years in IIA: 13 years
Employer: Capital Blue Cross

Adrienne Reid
Governor
Years in IIA: 10 years
Employer: PHEAA

Jacki York
Governor
Years in IIA: 8 years
Employer: Boscov's Department Store

Sheryl Sheffer
Governor
Years in IIA: 17 years
Employer: Fulton Financial Corporation

Lori Felder
Governor
Years in IIA: 15 years
Employer: Penn National Insurance

Marc Ryan
Governor
Years in IIA: 33 years
Employer: Fulton Financial Corporation

Lisa Shymanski
Governor
Years in IIA: 17 years
Employer: PSECU

Jennifer Piazza-Bohr
Governor
Years in IIA: 20 years
Employer: Highmark Health

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2020-21 Chapter Leadership

Board of Governors

Mei Gentry
Governor
Years in IIA: 7 years
Employer: Foot Locker, Inc.

Lauren Gallagher
Governor
Years in IIA: 15 years
Employer: Fulton Financial Corporation

Donna Eyler
Volunteer Registrar
Years in IIA: 27 years
Employer: Fulton Financial Corporation

Megan Brown
Governor
Years in IIA: 8 years
Employer: Fulton Financial Corporation

Andria Jacobs
Immediate Past President
Years in IIA: 15 years
Employer: PSECU

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2021-22
Chapter
Leadership

Officers

Amanda Hertz
President
Years in IIA: 8 years
Employer: PHEAA
Email: amanda.hertz@pheaa.org

Brian Shuey
President-Elect
Years in IIA: 5 years
Employer: KPMG
Email: brianshuey@kpmg.com

Amanda Smith
Treasurer
Years in IIA: 8 years
Employer: Lancaster General Health
Email: asmith8@lghealth.com

Lori Felder
Vice President
Years in IIA: 15 years
Employer: Penn National Insurance
Email: lfelder@pnat.com

Stephanie Kohr
Secretary
Years in IIA: 13 years
Employer: Capital Blue Cross
Email: stephanie.kohr@capbluecross.com

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2021-22
Chapter
Leadership

Board of
Governors

Damian Dyer
Governor
Years in IIA: 16 years
Employer: PSECU

Adrienne Reid
Governor
Years in IIA: 10 years
Employer: PHEAA

Jacki York
Governor
Years in IIA: 8 years
Employer: Boscov's Department Store

Sheryl Sheffer
Governor
Years in IIA: 17 years
Employer: Fulton Financial Corporation

Stacey Harbst
Governor
Years in IIA: 4 years
Employer: KPMG

Jennifer Spinner
Governor
Years in IIA: 10 years
Employer: Fulton Financial Corporation

Lisa Shymanski
Governor
Years in IIA: 17 years
Employer: PSECU

Jennifer Piazza-Bohr
Governor
Years in IIA: 20 years
Employer: Highmark Health

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2021-22
Chapter Leadership

Board of Governors

**Mei Gentry**
Governor
Years in IIA: 7 years
Employer: Foot Locker, Inc.

**Lauren Gallagher**
Governor
Years in IIA: 15 years
Employer: Fulton Financial Corporation

**Donna Eyler**
Volunteer Registrar
Years in IIA: 27 years
Employer: Fulton Financial Corporation

**Megan Brown**
Governor
Years in IIA: 8 years
Employer: Fulton Financial Corporation

**Jennifer Smith**
Immediate Past President
Years in IIA: 22 years
Employer: Rite Aid

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