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# QAI FEDERATION CHAPTER NEWSLETTER

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Volume 1, Issue 3

July 2000

## Message from the President

**Jill LeClair, CQA, CSTE**

*President of QAI Federation Chapters*

In this, our 3<sup>rd</sup> newsletter, I'm pleased to be able to deliver information to you about 2 new chapters in the Federation. Having been involved in starting our chapter here in Charlotte, I know the work involved in this endeavor. My hat is off to Richard Buck and Roger Dobbyn for their efforts.

While I have been able to fill a good number of pages for this newsletter, I would welcome additional participation from the chapters. As you can see from prior publications, the topics for articles are as varied as the chapters themselves. I'm not picky about what I include! I plan to publish the next issue in mid-October and would love to highlight what you are doing to recognize October as National Quality Month. If you are unaware of this annual event, I can point you in the direction of additional information and resources that your chapter can utilize to celebrate.

Lastly, on a personal note, I have made a difficult decision to take a leave of absence from my job at Bank of America. This leave begins on 8/1. During this time, I will be maintaining my Bank of America email address and phone number, but will not be checking them on a daily basis. You may still contact me via those channels, but you will get a message stating that I am out of the bank on leave. Rest assured that I am still on

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## QAI Federation WebRing

**Greg Jones**

*CITQAA President and QAI Federation RingMaster*

In the previous issue of this newsletter, I made a proposal that the QAI Federation Chapters should set up a Web Ring in order to better link our activities and to make a more unified web presence. This article is a status update of that effort.

### Participation

At the request of QAI, I assumed the role of "RingMaster" for the QAI Federation Web Ring, and so began coordinating the project. A request was sent out to all the known contacts at the Federation Chapters. Those Chapters that responded indicated that they would like to join a Federation Web Ring. Others have thus far either chosen not to participate, or do not currently have a web site. This is a status of all the Federation sites shown on the QAI Federation page:

#### **Federation Ring Member Site (Pending) –**

Atlanta, AQAA; Central Ohio, COQAA; Charlotte, CITQAA; Chicago, CQAA; Jacksonville, JISQA; Kansas City, KCQAA; New Jersey, NJQAA; Hudson Valley NY, QANA; Phoenix, PQAA; Raleigh, TISQA; Toronto, TASSQ; QAI; Ring Home Page

#### **Unknown or No Web Site –**

Austin, AA-IT-QP; Baltimore, QAAM; Denver, SquAD; Europe; Hartford, QAAC; Lincoln, SEQAL; Long Island, QIP; Minneapolis, TCQAA; Montreal; New York, QMA; Omaha; Orlando, CFQAA; Ottawa, AQO; Russia, RQAA; Sacramento, SAQA; Salt Lake City, SLQAA; San Francisco, BAQA; Seattle, SASQAG; South Africa, SASQ; Sydney

If your Chapter is not on the list of potential web ring sites, and you would like to participate, please let me

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## CALENDAR OF EVENTS

### QAI'S INTERNATIONAL SOFTWARE TESTING CONFERENCE

PLACE: ORLANDO FLORIDA

DATE: SEPTEMBER 11-15 2000

Programs will focus on software testing techniques from testers in the real world.

### QAI SEMINARS (AUGUST - OCTOBER)

- |            |  |
|------------|--|
| Aug 2-3    | E-commerce Testing, Kansas City KS   |
| Aug 8-10   | Using Measurement for Improving Quality and Productivity, Atlanta GA                     |
| Aug 8-11   | Boot Camp for Testers, Minneapolis MN  |
| Aug 14-15  | Risk Assessment and Risk Management in the Software Development Process, Baltimore MD    |
| Aug 14-15  | Test Planning with Use Cases, Raleigh NC   |
| Aug 16-18  | Defining and Validating User Requirements, Minneapolis MN                                |
| Aug 23-25  | Effective Methods of System Testing, Waltham MA  |
| Sept 20-22 | Boot Camp for Business Analysts, Omaha NE  |
| Sept 20-22 | Quality Control Walkthroughs, Reviews and Inspections, Charlotte NC                      |
| Sept 25-27 | Defining a Project Office Emphasizing Project Leadership, Risk and Control, St. Louis MO |
| Sept 26-29 | Boot Camp for Quality, Omaha NE  |
| Sept 26-29 | Boot Camp for Testers, Baltimore MD  |
| Oct 4-6    | Managing OO Projects, Charlotte NC   |
| Oct 9-10   | Test Planning with Use Cases, Charlotte NC   |
| Oct 10-11  | Risk Assessment and Risk Management in the Software Development Process, Nashville TN    |
| Oct 10-13  | Boot Camp for Testers, Denver CO   |
| Oct 17-19  | Defining and Improving Work Processes (Standards), Seattle WA                            |
| Oct 18-20  | Defining and Validating User Requirements, Williamsburg VA                               |
| Oct 24-26  | Effective Methods of System Testing, San Diego CA  |

*We are what we repeatedly do.  
Excellence, then, is not an act, but a  
habit.*

## Spotlight on New Chapters

### Quality Assurance Networking Association

*Serving Westchester, Putnam, Rockland and Lower Dutchess counties in New York*

Congratulations to Richard Buck, acting President of QANA, on a successful start to one of the newest QAI Federation Chapters. The Quality Assurance Networking Association (QANA) is a group of Quality Assurance professionals who promote and manage within their organizations. The association fosters quality principles, continuous improvement processes, quality tools, measurement and customer satisfaction. They are working on approving chapter by-laws and filling the seats on their Board of Directors.

Their chapter web site can be found at

[www.geocities.com/qana\\_wprd/](http://www.geocities.com/qana_wprd/)

### Software Quality Association of South Florida

*Serving Miami-Dade, Broward and Palm Beach counties in Florida*

Roger Dobbyn, CQA, CSTE, has announced the formation of the Software Quality Association of South Florida (SQASF). The purpose of this chapter is to create a local forum for the exchange of Quality Assurance information, best practices and education amongst Information Technology Professionals. The Board of Directors has been established, and the group is planning their first public meeting for late September.

A chapter web site is being developed. In the interim, anyone interested in more information about this group can contact Roger at [RogerDobbyn@spherion.com](mailto:RogerDobbyn@spherion.com). 📖

## First ITEC Show for CITQAA

### John West Public Relations Committee Chair Person

*CITQAA, Charlotte NC*

The Charlotte chapter of QAI experienced our first Information Technology Exposition this year and it was a great experience!

The ITEC event was held in Charlotte in June at our Convention Center. If you are not familiar with this

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know. There is no hurry to join the QAI Federation Web Ring; sites can be added or removed from the Ring at any time.

### **Status of the Project**

The infrastructure for the QAI Federation Ring has been completed. This work consisted of creating an ID in the webring.org database and customizing some parameters there.

The next step was to test the addition of the CITQAA site to the ring. I used this site as a test bed because I could directly control it and could see the effect of various parameters, formatting, etc. I also created a new logo for our ring (based on the QAI logo, and seen at the end of this article). The logo will appear on our page in the webring.org database, and should also appear on the link page of each web ring member.

Once I understood how site addition works, and successfully added CITQAA to the ring, I created a Home Page for the ring, which contains instructions about how to add your site to the ring. This approach was modeled after other web rings I have looked at. Again, since I could control the content, I placed the Ring Home Page on the CITQAA site, although from the point of view of the ring users, it could be anywhere.

At the time I am writing this, we are currently in the process of testing the addition of a remote (i.e. not controlled by me) site, the "Federation Chapters" page on the QAIUSA site. Once we get any bugs worked out of that, we will open it up to all the Federation Chapters who wish to participate. Hopefully, by the time you read this, your Chapter's WebMaster will have received the go-ahead to link up your site to the QAI Federation Web Ring. 📖

*Editor's Note: Contact Greg Jones at 704-683-1294 or [greg.b.jones@bankofamerica.com](mailto:greg.b.jones@bankofamerica.com).*



## **CONTRIBUTORS NEEDED**

**DO YOU HAVE INTERESTING INFORMATION YOU WANT TO SHARE WITH OTHER FEDERATION CHAPTER BOARDS OR MEMBERS?**

We're looking for articles to fill our next Federation Chapter Newsletter, scheduled to be published in early October. You may donate articles from your own newsletters or write brand new articles for inclusion.

Please contact Jill LeClair, CQA, CSTE, to be involved in this important and useful publication.

Email: [jill.leclair@bankofamerica.com](mailto:jill.leclair@bankofamerica.com)

Phone: 704-683-1325



*Journal of the Quality Assurance Institute*

*October 2000 Deadline*

Articles and Announcements due 8/25

Advertisements commitment by 8/25, ad copy by 9/8

*Contact Stevi Ritch at QAI for more information*

## Tips on Hosting A Local Conference

### Julie Lindsey, CSTE, KCQAA

Is your Chapter's Board of Directors looking for ways to provide value for your membership? Does your company need exposure to quality concepts? Need a team building experience? Whatever your motivation, preparing for and hosting a conference is a lot of work but provides a lot of value. The Greater Kansas City Quality Assurance Association (KCQAA) partnered with the Quality Assurance Institute (QAI) to sponsor a three-day E-Commerce quality conference in June of 2000. Preparations for this event began as long ago as 2 years, when the KCQAA President, Jim Brunk, first presented the idea to QAI and the KCQAA Board of Directors. Since then, the Board has put in many hours planning and preparing, and the staff of QAI has helped every step of the way. In sharing some of our experiences we hope your chapter will consider hosting a local conference.

### Seven Key Areas for a Successful Conference

**1. Principal Players:** Who will be involved with the conference? Include organizations and specific people for initial contacts. We partnered with QAI to provide us with the experience of having held several national conferences. This gave us a basic framework and a set of expectations. We also partnered with a local company to help shoulder the costs of hosting a conference reception.

*Hint for Success – Follow a proven framework, such as QAI's.*

**2. Topic:** What will be the general theme of the conference? What specific tracks of presentations will be available? What types of keynote presentations are desired? What topics are of interest to your membership? Selecting the topic of E-Business and following the QAI framework of a Quality Control and Quality Assurance set of tracks was one of the first decisions made by the Board of Directors. Determining keynote focus was also in the original decision-making. We liked the idea of using local talent for our keynotes and the board members set off to find volunteers.

*Hints for Success – Start off small and simple! Pre-conference boot camps help get attendees and staff in the swing of things.*

**3. Location and Dates:** When and where will the conference be held? Of course, we wanted the conference in Kansas City, but where and when? We reviewed the QAI conference and training schedules as well as KCQAA's

agenda for 2000 and selected a set of dates. We then provided potential locations to QAI. Here is where the conference experience comes into play. The staff of QAI managed the task of contracting the location, including conference rooms, registration needs, attendee discounts for lodging, and daily food service.

*Hints for Success – Experience and attention to details are a must.*

**4. Food and Lodging:** What food will be provided and where are attendees going to rest? Having attended conferences sponsored by QAI, we expected "out of towners", and yes, our expectations came true. We had attendance from 25 states and Canada. Thanks to the staff of QAI, these travelers all made their way to Kansas City International Airport, and finally downtown and to the hotel. They also located the conference within the hotel - quite a trick for some! Lastly, food was definitely not in short supply during the conference.

*Hints for Success – Think like a vacationer, make it easy and comfortable.*

**5. Speakers:** Who are we going to get to talk for three days? This is a big task, one in which everyone is involved. KCQAA was originally responsible only for the keynote speakers. QAI was to take care of the pre-conference boot camp and track presentations. To support the conference, the KCQAA Board of Directors were to act as track hosts and registration staff. Notice all these statements are in the past tense? Just like with any good project, flexibility and contingency planning are good things! The keynote speakers were all lined out and their materials were promptly delivered to QAI for publication in the handouts. QAI sent out calls and used their reference list to get presenters for two tracks per day. QAI also lined up the pre-conference trainers for the two boot camp sessions. All was set, or so everyone thought. We had several regrouping issues including replacing a keynote presenter and a wrap-up host, travel problems preventing a pre-conference trainer from attending, and late arriving presenters. But, the teamwork and determination pulled things together.

*Hints for Success – Always have an extra presentation ready and practice giving presentations prepared by others. Always have a keynote in your back pocket.*

## Hosting a Conference

Continued from page 4

**6. Reception and Entertainment:** What are attendees to do when they are not at the conference? We planned a reception in keeping with the QAI conference framework. But, what do you do for a reception for 100 to 150 people – on a budget of course? Well, of course you want food and drink. Do you want entertainment? If so, what type and where do you find them? This was another special assignment for one of the Board of Directors. With suggested food ideas, cost estimates, and entertainment options, the Board of Directors was able to negotiate a contract with the hotel staff to add the reception to the event. We discussed entertainment options and finally decided to show some Kansas City spirit with a band playing “quiet jazz”. With several suggestions from the Board of Directors, our appointed member found the perfect group.

**Hints for Success** – Show off your city, your chapter, and have fun!

**7. Administrative:** What about all other administrative things like registration, handout materials, give-aways, table displays, security, etc.? This is a task big enough to involve everyone. Once again, following the QAI conference framework we were able to limit ideas and follow standard processes. QAI handled most of the registration work via their web site. Presentations were sent to QAI and they prepared the handout materials for the pre-conference boot camps and conference sessions. KCQAA and QAI had materials for display and KCQAA introduced our new shirts for sale. Oh yeah, what about keeping the materials and audio/video hardware secured when we were not on site? All of this must be considered. It’s just those little details that make any event a success.

**Hints for Success** – Calm and rational teamwork!

Are you ready now to start planning a local conference for your Chapter? Start with your membership. What are they looking for regarding training and industry technology. Then find a strong group of partners and go for it! 📖

*Editor’s note: I attended the E-commerce Conference in Kansas City last month and I can honestly say that the hard work and preparation by KCQAA and QAI paid off! The conference was a rousing success and everyone I talked with shared an idea or concept they had picked up at the conference and were going to take back to their jobs. This is certainly a recipe for success. Congratulations to Jim Brunk and KCQAA and thanks to Julie Lindsey for taking the time to document their lessons learned for the benefit of the Federation. - Jill*

## A QA Crossword Puzzle

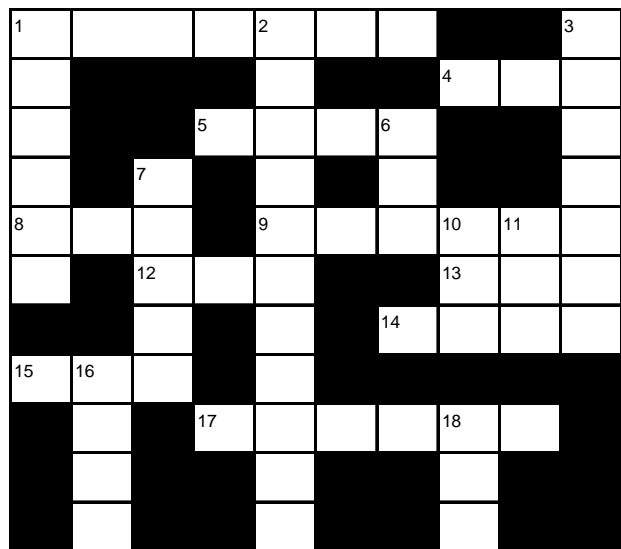
Ceretha Andrews, Atlanta, AQAA

### Across:

1. Widely regarded as the father of process management
4. Vendor Identification Number (abbrev.)
5. Popular TQM problem solving approach (initials only)
8. Short version of the central processing unit
9. A guiding principle typically established by senior management, which is adopted by an organization or project to influence and determine decisions
12. \_\_\_ Date. Top of mind for Project Mangers.
13. Message from a sinking ship
14. Popular QA contraction during training phases
15. Abbreviation for testing that results in a client sign-off
17. According to Webster, of or relating to the meter

### Down:

1. Reported error in a released software product
2. The “I” in IV&V
3. In this role, people often act as the liaison between the user and Information Services. Business \_\_\_\_\_
6. The phases effecting quality
7. QA Activity that determines the extent of process compliance
10. Abbreviation for renowned standards organization
11. The other side of a popular problem solving approach
16. One united with another in an alliance
18. The result of water chilling to 32 degrees or below



Answer on page 7

# Managing Requirements at the Object Level

Larry Boldt, SVP of Software Services, Technology Builders, Inc.

Requirements management, or the process of specifying what customers need and expect from a product or software system, has existed since the beginning of development. Yet every year, teams expend millions of dollars on development projects that are delayed, extended, over-budget and cancelled, due in large part to the lack of a good requirements management process. As applications and systems grow in complexity, the process of defining and developing requirements becomes ever more critical, and invariably more challenging.

Organizations that wish to cut development costs, decrease time-to-market, yet maintain quality should investigate the object-oriented requirements management process. An object-oriented approach to requirements management, while new to many organizations, ensures that requirements are treated as separate, yet related objects. This approach allows requirements, which are changeable by nature, to be easily modified, and their related requirements identified. Also, this approach allows requirements to be linked to associated development and testing entities to ensure that changes to the requirements are communicated throughout the development cycle. In short, an object-oriented approach bypasses many of the pitfalls of traditional, document-based requirements management processes in which documents contain static, unrelated, inflexible requirements.

The primary challenge involved in an object-oriented approach is not so much implementing the process, as it is changing the mindset of the individuals involved. Project teams begin to see the requirements as they really are: individual pieces of information containing specific attributes and having complex relationships.

## ***Thinking of Requirements as Objects***

Most companies initiate the requirements management process by writing a document that defines the product requirements in detail, including what functionality the product should deliver; its system properties such as performance, reliability and efficiency; and the constraints on the operation and development of the product. This document serves as the official statement of the product/system requirements for all stakeholders, which may include customers, end users and system engineers. The document is commonly referred to as the functional specification, the requirements definition, or the software requirements specification (SRS).

event, it is a national exposition to promote the IT industry. National, regional, and local vendors from all aspects of the industry have booths to display the latest product and service offerings. Earlier this year, our PR committee was discussing possible ways to promote our association in the community. While CITQAA has experienced significant growth since its inception, we are always looking for methods to promote QA best practices and gain new members. Someone suggested that we participate in the ITEC show, so we started making calls for information.

I contacted Warren Weaver, [warrenw@asmcorp.com](mailto:warrenw@asmcorp.com), who is the Event Director for ITEC. When I explained what our group is all about, he was very interested in assisting us in obtaining a booth in the show. In return for the booth, he requested that we provide guest speakers each day to present relevant topics. We agreed.

Once it was decided that we were going forward with this show, we began discussing ideas on how we would execute. Our membership was very supportive with ideas and volunteers to assist in the booth.

Fortunately, we had funds to allocate towards purchasing giveaway items such as logo pens, mouse pads, mints, etc. We also had a banner made to hang behind our booth so visitors would know our name even if they didn't know who we were or why we were present.

We also asked QAI to help us fill our booth by sending us brochures about the organization and its educational offerings. Bill Perry graciously agreed to donate a couple of copies of his new book to give away at the end of both days of the show.

Our booth was advertised on our web site, with presentation times and topics listed. We had people stop by the booth just to tell us they had come to the exposition just to see our presentations!

We felt we had a great success with ITEC. Of course, there are always things you want to do better next time. One thing we will do in the future is to have a display of some sort to help lure people to the booth. A simple chart displaying the costs associated with finding software defects early in the development life cycle might be one idea - anything to help attract attention and identify in some way your purpose. 📖

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## Managing Requirements at the Object Level

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For organizations that have formalized the requirements management process, a typical requirements specification can consume hundreds of pages, depending on the scope of the system being developed. In many instances, the focus of requirements management is more on writing and completing the document than it is on ensuring the completeness and consistency of the requirements prior to development. Attempting to manage requirements through a document can be very time-consuming based on the volatility of change, and in some cases, attempting to keep the document up to date can be an impossible task.

Instead of collecting requirements into documents, treating requirements as objects provides the following:

- ◆ **Visibility** - Requirements are viewed, sorted and filtered on an individual basis as opposed to being buried in a document. This approach provides a mechanism for clearer elicitation, analysis and communication of requirements.
- ◆ **Reusability** - Provides for requirements versioning within multiple or interdependent releases of a project.
- ◆ **Testability** - Each requirement has its own verification and validation criteria. It allows the testing process to be initiated earlier in the development lifecycle.
- ◆ **Traceability and Replaceability** - Each requirement is traced from its inception to its deployment in the delivered system. Allows impact analysis to be conducted any time changes to requirements are identified or anticipated.
- ◆ **Maintainability and Security** - Provides an individual record of changes, ID of who made the change and why, rather than forcing stakeholders to review a specification document annotated with change bars.
- ◆ **Full Characterization** – In addition to a text-based description, each requirement can be linked to other objects such as process models, use cases, spreadsheets, documents and test cases.

### **A Central Requirements Repository**

The majority of companies conducting some level of requirements management store their requirements in Word documents or spreadsheets. More sophisticated organizations have begun using departmental databases, such as Lotus Notes. Other less-effective approaches include using white boards, notebooks, Post-It notes and other unreliable, oftentimes illegible forms of communication. Even when an organization has a more mature approach, all projects rarely employ a consistent approach.

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Managing requirements in a centralized repository greatly improves the requirements management process. It initiates the standardization and sharing of requirements across all projects. It allows requirements to be easily traced from inception through deployment and maintenance. It also provides a collaboration mechanism where threaded conversations among stakeholders can be associated with individual requirements. Most importantly, it provides more effective and efficient impact analysis, trade-off analysis and risk analysis of requirements.

### **Collaboration and Automatic Notification of Requirement Changes**

Defining requirements is a continuous discovery process. The process usually begins with high-level or abstract statements of the users' needs. Further refinement, analysis and definition occur as more becomes known about the problem to be solved. By their nature, requirements are volatile and dynamic. A basic premise of requirements management is that requirements can and will change. When they do change, it is critical that all affected parties are notified of the change in a timely manner.

When requirements are stored in documents, the process of notifying the affected stakeholders presents two challenges. First, the individuals making changes may not know everyone who is affected by the change. Secondly, even when they do know who should be

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## **Answer to QA Crossword Puzzle**

D	E	M	I	N	G			A	
E			N			V	I	N	
F		P	D	C	A			A	
E	A		E		L			L	
C	P	U		P	O	L	I	C	Y
T		D	U	E			S	O	S
		I		N		D	O	N	T
U	A	T		D					
	L		M	E	T	R	I	C	
	L			N			C		
	Y			T			E		

## **Managing Requirements at the Object Level**

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notified, they cannot always ensure that notification is accomplished in a timely or accurate manner. When requirements are considered as individual objects, it is easier to identify who is responsible for each requirement and who should be notified when it changes. Using an electronic form of notification, such as E-mail, to distribute changes ensures that notification is accomplished in a timely manner. The electronic change notification should inform the stakeholder of who made the change, what was changed, why it was changed and when it was changed. This approach ensures that all stakeholders promptly learn about all changes that affect them. When this approach is combined with requirements traceability, impact analysis of the change can be accomplished easily.

### ***Applying Technology to the Process***

The next step in the re-engineering process, after the “outside-the-box” thinking has concluded and an improved process is defined, is to address how technology can enable the new process. If the new process is based on treating requirements as objects, defining requirements at their source, storing requirements in a centralized repository and automatically notifying all affected stakeholders any time a requirement changes, the next step is to consider what technologies will support its implementation. Consider the four factors described below when making technology selection decisions.

First, the technology selected must support an organization’s best practices for system development. Every organization handles requirements management differently. Based on the scope and complexity of a project, the time and activities allocated to requirements management can span a wide spectrum.

Second, since the project manager is ultimately responsible for all requirements, the technology must not add to an already daunting list of tasks and activities. The technology must allow the project manager to effectively control the scope of the project and easily assess the impact of changes to requirements and the project schedule.

The third criterion is that the technology is easy to use. If the project involves business managers and end users in the requirements management process, the tool must fit into a familiar context. If it is to be used by developers, it must be robust enough to support daily usage.

The fourth criterion for the technology is that it must simplify generating and distributing specification documents. Every organization has unique formats for their specification documents, and the technology should easily support generation of any style of document. Distributing documents in electronic form via the Internet is essential to the way distributed development teams work today.

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A requirements management tool that tightly integrates these four criteria will provide the project team with an efficient and effective way of managing all requirements from inception through deployment.

### ***Benefits of the improved process***

Implementing the re-engineered process changes our definition of requirements management and our perception of requirements. In addition to defining and documenting requirements, our new definition of requirements management now includes controlling, managing, tracking and communicating **changing** requirements. Instead of perceiving requirements as specification documents, requirements are viewed as reusable objects that can be assembled into a specification document at any point in time to accurately reflect the current version of requirements. Such an approach helps support a collaborative process for distributed development teams by providing an “electronic meeting room” for reviewing, collaborating and approving. It can speed up the development process through reuse of requirements and can minimize the number of times a requirements specification is reviewed before it is approved. It provides a basis for test planning to begin in the early stages of the systems development life cycle and provides a repository for standardizing cross-project reporting. Finally, an object-oriented approach provides an automated means of doing impact and “what-if” analysis.

Changing the requirements management mindset of an organization from being document-centric to object-centric requires time and commitment to re-engineering the process and training the organization in the new process. However, the long-term benefits to the organization far exceed the time and effort spent in getting there. 📖

## **Certification Prep Courses**

There are a number of chapters that have certification prep courses scheduled this year. Anyone can attend – they are not limited to chapter members. Below is a partial listing:

**Sept 21-22** Overland Park KS; CQA Prep Course  
Contact Julie Lindsey 913-339-1271

**Sept 21-22** Valley Forge PA; CSTE Prep Course  
Contact Donna Della Buono 610-669-1570

**October (TBD)** Charlotte, NC; CQA/CSTE Prep Courses  
Contact Beverly Kopelic 704-236-0712

### **Message from the President**

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the job with QAI and will continue my work on behalf of the Federation while I am out. However, I will not be able to be as prompt in my responses to you as I have been in the past. I appreciate your understanding during this time. 📖