

Breakout Group #1

Moderator:

Stewart Carlin

Group members:

Ron Bobo

Julian Deal

Robert Minnear

Harvey Tarpley

Jim Underwood

Scribe:

John Giddens

Question #1

It is predicted that in the next five years, CPE will be delivered more through technology and less through seminars and conferences.

- Do you agree with this prediction?
- Do you see webcasts as continuing to gain popularity in the CPE marketplace?
- What other type of technology delivered CPE is appealing to you?

Comments

1. The group agrees the trend is delivering CPE through technology.
2. Yes webcast will continue becoming more popular because of cost and convenience (on-demand).
3. Select group of people will still want to do in house CPE because of dialog between participants.
4. Conferences with specific current topics from various speakers.
5. A GSCPA TV with specific topics at a specific time would be appealing.

Question #2

Is CPE the leading member service offered to members by the GSCPA?

Comments

Yes

Question #3

What is most important to members when selecting CPE?

Comments

1. Value Received
2. Cost
3. Compliance with CPE requirement
4. Content
5. Area of work (job related)

6. New Development
7. Location of presentation

Question #4

What is the primary appeal for members to join a chapter?

Comments

1. Fellowship
2. To advance in Society
3. Networking
4. Outside the metro area chapters are more important to members. Local area firms encourage participation which is not so in larger areas.

Question #5

For years chapters have sought ways to improve attendance at chapter meetings, yet attendance is relatively flat overall. Is this an irreversible condition based on current business trends and lifestyle changes?

Comments

1. Yes, younger staff does not want to give up any more of their personal time (nights). Change in lifestyle – no value to them personally.

Breakout Group #2

Moderator:

Mike Cauley

Group members:

Bill Bomar

John Cook

Sam Johnson

Mike Verner

Scott Voynich

Scribe:

Bill Schneider

Question #1

It is predicted that in the next five years, CPE will be delivered more through technology and less through seminars and conferences.

- Do you agree with this prediction?
- Do you see webcasts as continuing to gain popularity in the CPE marketplace?
- What other type of technology delivered CPE is appealing to you?

Comments

1. The group agrees with trend, but question is how much will technology take over (50%, 75%, 100%). The trend is to use technology delivered CPE to “fill in” the minimum requirements while picking a few key in person opportunities for learning. There is a big generational difference in desire. Technology is changing to allow more interaction, but it’s not the same as an in person seminar. On the other hand, the generational difference is a preference of the way to interact.

Question #2

Is CPE the leading member service offered to members by the GSCPA?

Question #3

What is most important to members when selecting CPE?

Comments

The group answered both questions two and three together.

1. How does this impact the revenue stream to the Society? If this is a member service does it matter to monetize the web based CPE and should we? If it is really a service then does no or low revenue matter? If we lose CPE revenue, how do we fund operations – how do we fund operations today? The issue is your relevance if you are not a center for member education. We have to be seen as a central plugger for member training and competence or we lose our members to other draws.

2. The mission should be to educate and provide knowledge to CPAs in Georgia. This is what makes us different from being a trade group.

Question #4

What is the primary appeal for members to join a chapter?

Question #5

For years chapters have sought ways to improve attendance at chapter meetings, yet attendance is relatively flat overall. Is this an irreversible condition based on current business trends and lifestyle changes?

Comments

Question 4 and 5 were answered together.

1. The trend is the trend. The new generation is not interested in going to chapter meetings. They would rather meet via facebook, etc.
2. Very regional focus – people will give up a lunch, but not an evening.
3. Fewer chapter meetings make it more important to meet when they do.
4. Chapters – good chapters will survive and should, but bad chapters should dissolve.
5. It gives individuals a chance to participate who may have never gotten that chance any other way.
6. Chapters that have firm involvement and smaller focus are more successful. Bottom line – chapter attendance won't improve – at best it will hold steady.
7. Concern raised over chapters competing with Society. Is this an issue or not – are chapters "stealing" revenue from the Society by taking advantage of state relationships with instructors, etc.
8. We need to focus on quality CPE for all members.
9. What is the goal and purpose of the chapters v. the GSCPA State Society?
10. What is the mechanism for having members get involved – drawing them together at chapters, CPE?

Breakout Group #3

Moderator:

Colin Blalock

Group members:

Rod Adair

Walt Bryde

Callaway Dorsey

Tom Fuller

Ben Lee

Margaret McConnell

Geoff Rhines

Mike Skinner

Brandon Verner

Kirk Jarrett

Scribe:

Donna Heavener

Question # 1

It is predicted that in the next five years, CPE will be delivered more through technology and less through seminars and conferences.

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- Do you see webcasts as continuing to gain popularity in the CPE marketplace?
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Comments

- Question – When will the Society start “tweeting” CPE sessions?
- Most people agree with the prediction
- Interaction/discussion is still important to some members; they don’t get that with online CPE
- AICPA has good, cheap CPE online
- Suggested cooperative/joint programs with other professional groups
- Younger members are more comfortable with online CPE & webcasts
- Webcasts work for shorter programs, but not for 8 hours of CPE

Question #2

Is CPE the leading member service offered to members by the GSCPA?

Comments

- Perception is that CPE is the leading member service.
- Is there a way to turn cancelled CPE courses into webcasts?
- Legislative representation and presence is an important member service.

- Society is known for producing quality CPE; issue is the cost. Firms will send several staff to less expensive programs. Example – not going to Don Farmer this year, but went to a less expensive option.
- Society needs to be more aware of competition and should try to compete with others.
- Joint program with other professional groups; expand our CPE to qualify for other designations.
- Work more closely with firms

Question #3

What is most important to members when selecting CPE?

Comments

- Topic
- Relevancy
- Location – bring CPE to more chapters
- Cost

Question #4

What is the primary appeal for members to join a chapter?

Comments

- Networking
- Leadership Development
- Visibility in Community
- Chapter involvement comes from the “tone at the top”
- Members want affordable (cheap) CPE; especially when they have to pay for it themselves as many industry members do.
- Leadership in chapters – chapters need to do a better job following-up with members to retain members
- Too many chapters in Atlanta area
- Some people want to go to other types of meeting, not just CPE
- More initiatives and directives should come down from the Society to help chapters. Focus all membership efforts on one area; example – one year mentorship, another year community service.
- Chapters should be active in community service; show CPAs being more involved in their communities. Get business word out to local communities.
- Question – Is the Society supporting chapters to the same extent they are supporting sections? Sections and chapters are not mutually exclusive, but complimentary.

Question #5

For years chapters have sought ways to improve attendance at chapter meetings, yet attendance is relatively flat overall. Is this an irreversible condition based on current business trends and lifestyle changes?

Comments

- Firms do not know enough about the Society and what is available; need to get staff into the firms; present GSCPA 101 and other programs about Society, including chapters.

Breakout Group #4

Moderator:

Larry Cohen

Group members:

Jenny Barber

Scott Collins

Mary Jo Duffy

Wendy Gates

Chris Miller

Perry Rountree

Margaret Waldrep

Scribe:

Deborah Reeder

Question #1

It is predicted that in the next five years, CPE will be delivered more through technology and less through seminars and conferences.

- Do you agree with this prediction?
- Do you see webcasts as continuing to gain popularity in the CPE marketplace?
- What other type of technology delivered CPE is appealing to you?

Comments

1. Webinars are cost effective and time efficient, but you lose the face-to-face interaction.
2. Excellent instructors are enjoyed in face-to-face.
3. When hosting webcasts provide an option to attend in person and online. Webcasts should not be longer than two hours.
4. Group prefers webinar technology.
5. Breakdown eight hour courses as stored two hour increments to broadcast later on demand with existing content.
6. Create a pause feature to start and stop for discussion purposes at remote locations.
7. Believe conferences will increase in popularity.
8. International standards courses will become more popular.
9. Podcasts with after tests to allow credit should be utilized.
10. Do not stop providing courses outside of metro Atlanta. These need to continue even if they get lower attendance. Expand the CPE delivery.
11. Partner with universities. The group was divided on this idea. The people who did not agree thought the instructors might not be at the level the Society is used to.
12. Create higher level CPE, but use Society training offices or the Galleria. Don't use the Ritz Carlton.

Question #2

Is CPE the leading member service offered to members by the GSCPA?

Comments

1. The leading member services are CPE, insurance, legislative and networking opportunities with other firms.

Question #3

What is most important to members when selecting CPE?

Comments

1. Topic, price and location are important to members when selecting CPE. It is too costly to travel.
2. CPE credit crossing over to other designation requirements, such as CFP and CIA requirements.

Question #4

What is the primary appeal for members to join a chapter?

Comments

1. Community awareness. The Columbus Chapter does not just offer technical CPE, but also covers local and political issues.
2. Networking and CPE

Question #5

For years chapters have sought ways to improve attendance at chapter meetings, yet attendance is relatively flat overall. Is this an irreversible condition based on current business trends and lifestyle changes?

Comments

1. Change what the chapters offer and focus on networking.
2. Alternate locations
3. Should section members be charged ten dollars because the Society serves them with staff, listserv and publications?
4. Chapters are still viable. Chapter officers are the key to keeping them viable.

**Breakout Group #5
(Industry/Education)**

Moderator:

Michael Levine

Group members:

Alyssa Belcher

Pam Clinard

Jack Hawkins

Patrick Hill

Tim Minster

Kathy Moffeit

Howard Mosby

Abbie Gail Parham

Jennifer Wilson

Ron Wrenn

Scribe:

Lydia Rosencrants

Question # 1

It is predicted that in the next five years, CPE will be delivered more through technology and less through seminars and conferences.

- Do you agree with this prediction?
- Do you see webcasts as continuing to gain popularity in the CPE marketplace?
- What other type of technology delivered CPE is appealing to you?

Comments

1. Two to three day conferences will continue face to face, but one day tax will go away.
2. Tough to get 40 hours of CPE online, so conferences will still be needed.
3. Many groups already offering CPE online and much is free.
4. Society needs to focus on making CPE affordable.
5. Webinars are very useful.
6. Everyone agrees that technology is the trend.
7. Everyone agrees that webcasts are gaining popularity.
8. New generation likes webcasts.
9. Affordable
10. Emerging economies are using webcasts.
11. Atlanta is too far for many Georgians.
12. Other forms of CPE that may be appealing are reading a book and taking a test or podcasts.

Question #2

Is CPE the leading member service offered to members by the GSCPA?

Comments

1. It's changing. Everyone needs CPE, but it is not as important to those in industry.
2. Like being able to keep up with CPE on web site, but would be nice to have all CPE on there, not just GSCPA.
3. Advocacy is becoming more important.

Question #3

What is most important to members when selecting CPE?

Comments

1. Fits into schedule
2. Relevance
3. Cost
4. Travel
5. Will it actually be beneficial?
6. Schedule
7. Quality/Entertainment value of speaker
8. Reputation of provider, knowledge increase, and price are the three most important factors when selecting CPE.
9. Convenience

Question #4

What is the primary appeal for members to join a chapter?

Comments

1. Atlanta members do not see appeal of chapters.
2. Those in smaller markets see it as a connection to other CPAs and the Society.
3. Social interaction
4. Speakers
5. Good ideas
6. Good meal/one hour of CPE for reasonable price
7. Enhance leadership opportunities for young CPAs

Question #5

For years chapters have sought ways to improve attendance at chapter meetings, yet attendance is relatively flat overall. Is this an irreversible condition based on current business trends and lifestyle changes?

Comments

1. No, chapters are fighting.
2. Firm support is crucial (partners and staff come).
3. Create a networking environment (invite other professionals).
4. Hard to appeal to the needs of everyone.
5. Delegate responsibilities so members feel that they have a role/purpose.
6. Extra topic: State Society no longer helps chapters publicize events.

Breakout Group #6

Moderator:

Darrell Thaw

Group members:

Herb Barnes
Lisa Conti-Bacon
Lee Ellen Fields
Bill Godshall
John Masters
Jack Milner
Terry Parker
Brian Rutledge
Randy Whitelock

Scribe:

Denise Grove

Question #1

It is predicted that in the next five years, CPE will be delivered more through technology and less through seminars and conferences.

- Do you agree with this prediction?
- Do you see webcasts as continuing to gain popularity in the CPE marketplace?
- What other type of technology delivered CPE is appealing to you?

Comments

Factors that influence CPE choices are:

1. Time; Convenience; lack of conflict with schedule
2. Relevance to job/content
3. Cost (including expenses of travel and hotel); plus lost billable time

Computer based, interactive webinars with good speakers appear to be the wave of the future. Ninety percent of our group have used online CPE and believe the trend is towards online CPE. However, conferences are still of interest for networking and targeted topics. Online lunch and learns would be a good service (lunch at your desk while learning).

If the topic is relevant to the person's job, time will be sacrificed to attend. Location is a factor due to metro Atlanta traffic and/or time away from work due to need to travel out of town for CPE.

Conference fees may be too high due to location (e.g., MAP Conference held at Ritz)
Topics that pander interests are more in-depth v. general courses.
CPE delivery should be pushed outside Atlanta.

The more technical the topic – learning is better “in person” to allow for Q&A. Webinars may be harder to follow on technical topics; thus, the topic should be considered when deciding the best method of delivery for a course.

Suggestion: Video and audio recording of courses and conferences indexed for easy “fast forward” to a specific topic should be considered; revenue stream can be generated by offering for sale on the GSCPA web site.

A variety of delivery methods are appealing.

Conferences: consider recorded or live feed to provide more delivery options.

Increase use of technology for convenience is a benefit to members.

Question #2

Is CPE the leading member service offered to members by the GSCPA?

Comments

No. CPE is viewed as a revenue generator (50% margin required). There are many competitors (including the AICPA) that offer CPE, and in many cases at a lower cost. GSCPA CPE is a service when it covers relevant topics not offered elsewhere. CPE is measured by “hours” vs. quality of materials learned.

Question #3

What is most important to members when selecting CPE?

Comments

1. Topic – relevant topic is most important factor
2. Convenience
3. Instructor
4. Location
5. Price

Question #4

What is the primary appeal for members to join a chapter?

Comments

1. Community
2. CPE
3. One hundred percent of our group belongs to a chapter. Networking is primary appeal to attend chapter meetings. However, the appeal of chapter meetings is different outside metro Atlanta. Outside metro Atlanta, chapter meetings are considered well attended for interaction with “comrades”. Members share problems and solutions. Attendance may be down due to the fact people are busy. Virtual chapter concept has merit and may appeal to younger generations more. A change to an internet format might work if topics discussed were relevant. The

group considers the appeal to attending a chapter meeting is the opportunity to gather with other CPAs in the area, to learn news and hear a relevant topic.

4. Chapters tend to have a meal and a speaker.
5. Sometimes A&A updates are provided via tapes.
6. Key to attending is relevant topic.
7. Many chapters actively support nearby colleges and college programs.
8. CPE is offered from other ways and is not a requirement of chapter meetings.
9. Chapter meetings are a good opportunity to mingle with other professionals.
10. Statement made that the Society and its directors have a love/hate relationship with chapters.
11. Statement made that state sent a message that chapters were not important and decreased support for chapter when the chapter funding formula changed.
12. Statement made concerning chapters may no longer offer more than four CPE hours (advised to follow the GSCPA request process).

Question #5

For years chapters have sought ways to improve attendance at chapter meetings, yet attendance is relatively flat overall. Is this an irreversible condition based on current business trends and lifestyle changes?

Comments

1. If chapter has leadership, each chapter should set forth what is relevant for their regional membership.
2. If the chapter does not have officer volunteers, the lack of willing leaders is an indicator that the chapter should be retired.
3. How does the state measure attendance if no CPE is offered? Advised in Annual Reports from chapters and referred to chapter leadership information.
4. Chapter representatives are not allowed to attend the Chapter Presidents' Breakfast at 2009 Fall Council. Advised no change from past practices.
5. Statement made that state directors did not support the chapters. Again, group viewed a difference between metro Atlanta and outside Atlanta participation.
6. CPE is not necessary to draw members to chapter meetings, but a good speaker with a topic of interest is needed.
7. Atlanta meetings are difficult to attend due to the commute and traffic. If the meeting takes too long (4 hours) plus commute, it takes too much time from the day.

Group did not get to discuss if metro Atlanta has too many chapters.

Group ran out of time to discuss if the GSCPA should continue to prioritize infusing technology into sections.

Breakout Group #7

Moderator:

Scotty Jones

Group members:

Bonnie Cox

Jeff Forrestall

Jay Green

Tracy Mathews

Beth Morrison

Ed Pease

Emily Sanders

Debbie Thaw

Alex Williams

Question #1

It is predicted that in the next five years, CPE will be delivered more through technology and less through seminars and conferences.

- Do you agree with this prediction?
- Do you see webcasts as continuing to gain popularity in the CPE marketplace?
- What other type of technology delivered CPE is appealing to you?

Comments

1. Trend is going towards the web. Cost and travel time is a factor, but quality v. content is the driving factor. Both seminars and webcasts have their audiences. Webcasts should be used for popular seminars. Networking with other CPAs will always have value.
2. For in-depth eight hour courses, seminars are better because most people can't watch a screen that long. Webcasts need to be interactive to be effective. Don't charge less because quality needs to be there. Some younger members don't have a problem with the long hours in front of the screen, but older members may need an incentive to switch to web cast.

Question #2

Is CPE the leading member service offered to members by the GSCPA?

Comments

1. It is our moneymaker, but not necessarily our leading service. The Society is the "face" of the profession to the public. The GSCPA courses should be brought into the firms (use their facility, coffee, etc.)
2. Insurance is important to some.
3. Networking Opportunities.

Question #3

What is most important to members when selecting CPE?

Comments

1. Location
2. Instructor
3. Topic
4. It would be great to know how speakers rank in surveys if you are not familiar with a particular speaker.

Question #4

What is the primary appeal for members to join a chapter?

Comments

1. Interesting Topics (good speakers and content)
2. Area and distance is a factor for larger chapters.
3. Older members need to encourage younger members.

Question #5

For years chapters have sought ways to improve attendance at chapter meetings, yet attendance is relatively flat overall. Is this an irreversible condition based on current business trends and lifestyle changes?

Comments

1. Lifestyle certainly has an influence. As long as a chapter is revenue neutral it should continue. Basically chapters should continue for the purpose they serve to those who choose to attend. May need to do away with monthly meetings and switch to events such as CPE days.

Breakout Group #8

Moderator:

Joe Spradlin

Group members:

Ron Thomas

Brad Reeder

Jennifer Birtz

Jerry Maxwell

Richard Hlozek

Brad Dickson

Scribe:

Don Cook

Question # 1

It is predicted that in the next five years, CPE will be delivered more through technology and less through seminars and conferences.

- Do you agree with this prediction?
- Do you see webcasts as continuing to gain popularity in the CPE marketplace?
- What other type of technology delivered CPE is appealing to you?

Comments

1. When CPE is taken depends on the time of year.
 - Did a presentation at HAW and they recorded it to parcel out to staff afterwards. This brings up a good point/idea. More and more people are becoming very "on demand" oriented and expect things to be delivered in this fashion. This might be a way for CPE to be delivered.
2. There needs to be a balance between in person events allowing for networking and web based CPE. However, on demand CPE does need to be looked at.
3. Firm is using webcasts through CPA America where an attendee can do the webcast during certain time slots or you can buy a disc and take the course at your leisure. Something like this does need to be offered in order to compete in the marketplace.
4. Networking, lobbying, and CPE are the three pillars which drive membership. More inclined to pay for Society CPE vs. CPE offered through other organizations. Society CPE seemingly stands above the rest and is more universally recognized. An attendee of Society CPE will not have any issues with the State Board as far as it being recognized either.
5. The theory of doing webcasting is good. Someone attending a webcast doesn't have to sit through an eight hour session typically to hear an hour sound byte. They tend to be more focused events and less time intensive.
6. The younger generations have really taken to the CPE online. They definitely seem to be very comfortable fulfilling most of their CPE requirements online.

7. At bigger firms webcasts tend to be a relatively small percentage of the CPE taken. Some of these firms do have CCH registrations where staff can sign in and take CPE at their leisure.
8. The consensus of the group is that they agree. In the next 5 years CPE will be delivered and received more through technology.
9. Why doesn't the GSCPA provide these opportunities? They need to.
10. The networking opportunities at conferences need to be beefed up.
11. Podcasts are also an option for audio only. The Taxation Section has done this in the past.
12. There is a group of members who need basic CPE and are looking. This will fill this need.
13. The Southwest Chapter offers an 8 hour A&A session every year for \$125. They only get 20 attendees on average every year. This begs the question – what is everyone else in Southwest Georgia doing to earn their CPE.

Question #2

Is CPE the leading member service offered to members by the GSCPA?

Comments

1. The small firms in the group said yes. CPE is the leading benefit and most of it is taken through the GSCPA.
2. The bigger firms said the leading benefit is the networking.
3. Advocacy another leading benefit.
4. Some said networking, advocacy, then CPE – in that order. No clear consensus on this question.

Question #3

What is most important to members when selecting CPE?

Comments

1. Topic
2. Relevancy
3. Updated/timely/fresh content and material
4. cost/location
5. Knowing that the CPE really does count as CPE – they know this with the GSCPA CPE. This could potentially be used in the marketing.

Question #4

What is the primary appeal for members to join a chapter?

Comments

1. Networking – it is good to get together with your peers in your same area.
2. Student Nights – these offer an opportunity to give back to the profession.
3. Can hear community leaders come speak at events.
4. Firm sponsorship – free lunch

5. More seem to show up when CPE is not offered. This shows the importance members place on networking.
6. The appeal is really the networking. When CPE is offered it's only one hour and doesn't seem to appeal to the masses as much.
7. The Southwest Georgia Chapter is going to "Networking Only" lunches with no CPE being offered and no speakers.
8. The appeal is really the networking and the ability to give back through scholarships.
9. Networking is the appeal.
10. More networking and getting to know people in the area.

Question #5

For years chapters have sought ways to improve attendance at chapter meetings, yet attendance is relatively flat overall. Is this an irreversible condition based on current business trends and lifestyle changes?

Comments

1. Whether something works or not is dependent on the chapter's leadership.
2. Local firm involvement in chapters is the key for good attendance/involvement.
3. Recommendation has been made to reach out to local firms in the area to get them more involved with their chapter.
4. An effort should be made to pull in more students to chapter meetings. Since cost has come up as an obstacle for students in doing this, then chapters should offer scholarships so they can attend chapter meetings throughout the year.

Joe Question Number 6

If you had a million dollars to spend towards something what would it go towards?
Would it be spent on adding technology to CPE?

Comments

1. Should not be spent on the hard costs of implementing this. Should be spent on outsourcing this option.
2. Should be donated to the Georgia Tech Foundation or UGA with the thoughts of them making their facilities available to us whenever we need to produce a webcast.
3. The consensus of the group was that it should be spent wisely, but should be spent towards technology.