

**Breakout Group Notes  
Spring Council Meeting  
Chattanooga Hotel  
Chattanooga, Tennessee**

**Group 1 ( Past Presidents):** Bill Schneider (Facilitator)  
Denise Mummert (Scribe)  
Ron Bobo  
Mike Cauley  
Julian Deal  
Harvey Tarpley  
Scott Voynich

Question 1: Is the GSCPA meeting your needs professionally and personally? What top three programs do you value; what are three programs that you do not feel are valuable? What additional programs would you like to see in the next 3-5 years?

Valued Programs – Current

- a. Legislative (Georgia) – Insights and participation with CPAs
- b. High level relationship with the Georgia Department of Revenue
- c. Technical high level conferences
- d. CPE – the price, quality and variety
- e. Leadership skills. Ability to serve as leader at early career stage. Training with the Leadership Academy.
- f. Community as a sounding board and support system
- g. Dynamics that permit younger professionals to be involved and move into leadership positions. Fostering leadership development.
- h. Branding of professional organization to clients and students

Less Valuable Programs

- a. Chapters – in areas where chapter is weak and is only GSCPA contact, member involvement may be weak.
- b. High School Residency Program – Are time and effort expended worthwhile? Need criteria to evaluate effectiveness. Track results.
- c. Need to continually evaluate programs - current (as opposed to former) for effectiveness. Better way to accomplish if still important. Need to formally review programs periodically.
- d. High School Honors Luncheon

Additional Programs

- a. GSCPA should have exposure at college/university honors programs (in addition to individual firms).
- b. New CPA Luncheon – Needs more promotion

Question 2: What is your viewpoint of CPE in the future? What delivery options will you be using in the next few years? How does or can the GSCPA play into that?

- a. CPE meetings and conferences are still important for personal interaction.
- b. Webinars – efficient and cost-effective
- c. Eight hour courses – option to attend in person or do online like a university course
- d. Remove A&A requirement

Question 3: What would cause you not to renew your membership?

- a. Death

**Group 2 (Past Presidents):** Paula Mooney (Facilitator)  
 Carolyn Riticher (Scribe)  
 Bill Bomar  
 John Cook  
 Charles Hendry  
 Allen Poole  
 Mike Verner  
 Bobby Whitmire  
 Jim Underwood

Question 1: Is the GSCPA meeting your needs professionally and personally? What top three programs do you value; what are three programs that you do not feel are valuable? What additional programs would you like to see in the next 3-5 years?

The Society is currently meeting our needs professionally, but it is too staff driven and needs to get back to being a member driven Society. Staff can assist, but not make decisions.

Needs are being met personally by social networking opportunities, but more opportunities to socialize such as hospitality suites need to be done.

Valued Programs

- a. CPE
- b. Leadership Academy
- c. Peer Review

Less Valuable Programs

- a. High School Residency Program – needs revamping
- b. Membership Recruitment and Retention Kit – not sure it is effective. Get managing partner support from firms.

Additional Programs

- a. New CPA Luncheon – bring back
- b. Revamp High School Residency Program
- c. Recruitment through managing partners

Question 2: What is your viewpoint of CPE in the future? What delivery options will you be using in the next few years? How does or can the GSCPA play into that?

CPE will move towards online courses, webcasts, etc. People will still want opportunities for interaction in CPE.

Suggestions for CPE are:

- a. Promote in house better
- b. Customize a course to meet specific firms needs
- c. Offer more advanced classes

Question 3: What would cause you not to renew your membership?

- a. Eliminating life membership
- b. Not being fiscally responsible
- c. Eliminate or greatly reduce opportunities for fellowship
- d. Not member driven enough or when I feel like no longer contributing value.

We want to keep convention. We want print copies of Current Accounts and Directory. It is a waste of money to print CPE book.

**Group 3:** Colin Blalock (Facilitator)  
Tom Fuller (Scribe)  
Rod Adair  
Adrian Loud  
Callaway Dorsey  
Tim Mason  
Dick Negus  
Darla Eden  
Randy Whitelock  
Chuck Dinkins

Question 1: Is the GSCPA meeting your needs professionally and personally? What top three programs do you value; what are three programs that you do not feel are valuable? What additional programs would you like to see in the next 3-5 years?

Valued Programs

- a. CPE quantities/reasonableness
- b. CPE variety and location
- c. Chapter support
- d. Leadership Academy
- e. Web site and technology
- f. Section membership
- g. Lobbying efforts
- h. Receptionist
- i. Conferences
- j. Advance Subjects

### Less Valuable Programs

- a. Annual Convention
- b. PR Awareness
- c. Chapter support sucks
- d. Leadership Academy is elitist
- e. Chapters need regional CPE support and need to be redistricted
- f. CPAs in Industry Section and Government Section
- g. Current Accounts publication is old
- h. Chapter member “discounts”
- i. Section membership

Question 2: What is your viewpoint of CPE in the future? What delivery options will you be using in the next few years? How does or can the GSCPA play into that?

CPE should be scattered more geographically. CPE is a general networking source. Need video conferencing or a satellite location. Large firms video conference. Value of CPE committee in that they can determine who is interested in what and where. Small firms need peer review. National conferences.

Question 3: What would cause you not to renew your membership?

- a. Dues increase.

### **Group 4:**

Larry Cohen (Facilitator)  
Jennifer Birtz (Scribe)  
Rebecca Boggs  
Lee Ellen Fields  
Perry Rountree  
John Masters  
Marlan Nichols  
Mike Skinner  
Michael Gardner  
Cindy Buie  
Brad Dickson

Question 1: Is the GSCPA meeting your needs professionally and personally? What top three programs do you value; what are three programs that you do not feel are valuable? What additional programs would you like to see in the next 3-5 years?

### Valued Programs and Suggestions:

- a. Feed the Pig – would like to change the mascot
- b. Chapters are becoming less important with Sections becoming more important. Chapters are still important for non-Atlanta members. Consider localized meetings for Sections. Would like more face to face networking and other meetings for Sections. Chapter attendance is dropping.
- c. CPE

- d. Peer Review
- e. Tax Section email blasts and listserves
- f. Conferences
- g. Insurance program with AICPA

Less Valuable Programs:

- a. To some – Leadership Academy expensive and not very valuable
- b. Affinity programs with exception of one with AICPA
- c. Feed the Pig
- d. Membership recruitment and retention – not very valuable because not being effectively used.
- e. Annual Convention needs to be added to Conference list.
- f. Job Bank and Career Resume posting – Is this still a program? Could be more effectively promoted and maintained

Additional Programs:

- a. Career Fair – publicize the College2Career event more
- b. Publicity and news releases – let people know what we do to give back to the community. PR, marketing function.
- c. Could the Leadership Council give chapters a project every year? For example, work with colleges to increase student membership.

Question 2: What is your viewpoint of CPE in the future? What delivery options will you be using in the next few years? How does or can the GSCPA play into that?

CPE should be kept in outlying areas as well as Atlanta. Webcasts from the Society and some outside the Society, face to face offered classes at the Society, conferences with networking opportunities, and CCH online will be options people look for.

Society will probably lose some revenue because members want CPE on their own schedule and convenience. Society should consider offering unique/focused CPE programs and be best in class.

AICPA provides more advanced level courses. Society seen as more beginner or intermediate level courses.

Society has trust factor; other vendors not as trusted.

Society should consider partnering with vendors, co-sponsor webcasts. Will give GSCPA seal of approval.

Can classes be less formally structured – less PowerPoint? Would like more updates/current events. Maybe the current events piece can be added to classes. CPE offerings are too structured; need more flexibility for classes in changing environment. Consider bringing back CPE committee. Need to be able to add a class with a few months notice, not wait until the next year.

Question 3: What would cause you not to renew your membership?

- a. Retirement, people leaving the profession
- b. No CPE
- c. Raise membership fees too high
- d. Loss of quality in CPE
- e. Adding non-CPAs to membership. Dilutes the brand.

**Group 5 (Industry):**

Barbara Evans (Facilitator)  
Lydia Rosencrants (Scribe)  
Bob Dow  
Alyssa Belcher  
Martha O'Brien  
Howard Mosby  
Jim Ray  
Christine Swanson  
Geoff Rhines

Question 1: Is the GSCPA meeting your needs professionally and personally? What top three programs do you value; what are three programs that you do not feel are valuable? What additional programs would you like to see in the next 3-5 years?

Valued Programs

- a. Leadership Academy and Alumni – creates a deeper level of connection, develops relationships for working together
- b. Networking – Know Society offers a lot even if we can't take advantage of all
- c. Committees – help enhance knowledge of professional environment, likes differing views, enhances communication skills
- d. Chapters – provides networking opportunities, CPE, leadership opportunities, and the chance to meet others in the same town or area
- e. CPE (tax update)
- f. Financial Institutions and Estate Planning Conferences
- g. Legislative Efforts
- h. Sections
- i. Student Outreach
- j. Educational Foundation

Less Valued Programs

- a. Student Outreach
- b. Some conferences – could we combine?
- c. Membership recruitment
- d. CPE at office
- e. Peer Review
- f. Membership rewards
- g. Location of office – rent
- h. Technology section
- i. Educational Foundation and Society overlapping on student outreach

### Additional Programs

- a. Self Study CPE
- b. Coordinate with other CPE requirements for other licenses and states
- c. Workers Comp health insurance for members
- d. Chatting, general forum
- e. Help connect job seekers/employers through job boards and networking
- f. Lobby Day (CPAs at the Capitol Day)

Question 2: What is your viewpoint of CPE in the future? What delivery options will you be using in the next few years? How does or can the GSCPA play into that?

CPE needs to be electronic with a flexible time schedule. There is still value in face to face CPE. Like conferences, but don't see value in coming to Society office with group of random people. Tag Leadership Academy events to current conferences. Like a Valuation and Fraud Conference.

Question 3: What would cause you not to renew your membership?

- a. Huge increase in dues.
- b. No reason – you need to be a part of the GSCPA if you are a CPA.
- c. Industry doesn't value as much.
- d. If not bringing unique learning experiences.
- e. If lose ability to interact with such a high quality membership.
- f. If not keeping up with change.

### Group 6:

Kay Proctor (Facilitator)  
Jill Boykin (Scribe)  
Walt Bryde  
Jeff Forrestall  
Tracy Mathews  
Denise O'Connell  
Debbie Thaw  
Alex Williams  
Jenny Barber

Question 1: Is the GSCPA meeting your needs professionally and personally? What top three programs do you value; what are three programs that you do not feel are valuable? What additional programs would you like to see in the next 3-5 years?

### Valued Programs:

- a. Leadership Academy
- b. Chapter meetings
- c. CPE programs
- d. Southeastern Accounting Show
- e. Convention
- f. Peer Review

- g. Ethics Committee
- h. Leadership Academy Alumni
- i. Financial Literacy Programs
- j. Communications
- k. Networking

Least Valued Programs:

- a. Student programs – too much focus – may need to redirect our resources
- b. Some conferences may not be as important as others.

Additional Programs:

- a. Would like to see the Distinguished Speakers Dinner come back. This program gives exposure outside of the profession. May improve attendance at this event if it was held in different areas of the state.

Question 2: What is your viewpoint of CPE in the future? What delivery options will you be using in the next few years? How does or can the GSCPA play into that?

Webcast – need to come up with a way to monitor if you are there – some use letters that you must record as you are watching the webcast, some have a test at the end. We should consider more conferences in webcast. It helps those located outside of Atlanta and may encourage them to sign up. Webcasts are a cheaper solution for both the CPA and the Society. However, you still need to have live instructors. Some of the older people would probably prefer a live seminar – many people actually prefer live, but they may be cost prohibitive (travel, registration, lodging, time away from town, etc.)

Most people agreed they would pay the same for live conference as they would for web cast.

Most firms are using in-house and GSCPA as a secondary choice. If they have 20 people attending a conference, they usually can hire the speaker directly for a lot less.

Would like to see more intro classes on work paper preparation.

The group does not think higher level classes are necessary even with budgets being tight.

Question 3: What would cause you not to renew your membership?

- a. Change in career
- b. If the GSCPA becomes too diluted – such as friends of GSCPA. Membership by too many non CPAs. We are currently well recognized by name. It will reduce our creditability.
- c. We are more experienced
- d. If we do not protect our brand.
- e. Dues are only a priority when it depends on who is paying.

**Group 7:**

Scotty Jones (Facilitator)  
Donna Heavener (Scribe)  
Scott Collins  
Alan Grothe  
Jerry Maxwell  
Terry Parker  
Ron Thomas  
Margaret Waldrep  
Ian Waller  
Barbara Borczak

Question 1: Is the GSCPA meeting your needs professionally and personally? What top three programs do you value; what are three programs that you do not feel are valuable? What additional programs would you like to see in the next 3-5 years?

Valued Programs

- a. CPE/Conferences
- b. Leadership Academy
- c. Technical Programs and Sections
- d. Succession Planning in co-committees – handled in MAP section
- e. Webcasts – positive – good for updated materials – easy to use
- f. Listserves
- g. Growth in student membership

Less Valuable Programs

- a. Conferences – down as compared to budget, but gross margin is lower

Additional Programs

- a. Need to expand membership recruitment – less than 60% of CPAs in the state are members
- b. Social Media – Linked In, Twitter

Question 2: What is your viewpoint of CPE in the future? What delivery options will you be using in the next few years? How does or can the GSCPA play into that?

CPE is changing trends based on cost versus benefit. Some firms are looking at less travel to CPE events. Webcast and online course enrollment is increasing. There are concerns that once firms go in this direction will it change back over the years. Firms are looking at lower cost options (course cost more important than number of options available).

Conference is preferred for CPE. The eight hours courses are seen as more general, not preferred. Motivational courses should be considered. Ethics courses should also be considered because licensed Florida CPAs need four hours plus exam.

Webcasts archives needed. Allow people to access this information at any time. Society needs to get the state board to approve credit for people who view archived webcasts. Should be considered self-study.

Onsite CPE costs for smaller firms are an issue.

Concerns with technology for video webcasts.

Question 3: What would cause you not to renew your membership?

- a. Members don't understand what the Society is doing.
- b. Concerns about generating revenue and supporting policy that doesn't support membership at local levels
- c. Support CPA brand – create ads for media. More needs to be done with this.
- d. Question about members selecting a chapter and getting members to participate

**Group 8 (Educators):** Joe Spradlin (Facilitator)  
Michael Broughton (Scribe)  
Kel-Ann Eycler  
Martha Merritt  
Kathy Moffeit  
Lowell Mooney  
Sondra Smith  
Ellen Sweatt

Question 1: Is the GSCPA meeting your needs professionally and personally? What top three programs do you value; what are three programs that you do not feel are valuable? What additional programs would you like to see in the next 3-5 years?

Valued Programs

- a. Accounting Institute Conference
- b. Governmental Accounting and Auditing
- c. Leadership Academy – needs to be re-marketed
- d. Student Membership Program
- e. High School Residency Programs
- f. Chapters (good education and firm networking)

Less Valued Programs

- a. Leadership Academy Alumni
- b. All other high school programs except High School Residency Program

Additional Programs

- a. New CPA Program (Lunch?)
- b. Chapter leadership program
- c. Distinguished Speaker (location and name recognition an issue)
- d. High School Residency Program expansion

Question 2: What is your viewpoint of CPE in the future? What delivery options will you be using in the next few years? How does or can the GSCPA play into that?

Society needs to be more flexible in delivery method of CPE. Firm paying versus out of pocket paying is an issue. Southeastern Accounting Show is great. Good cancellation policies for CPE courses. Mix live classes and webinar. Possible free usage of rooms at colleges, etc for CPE.

Question 3: What would cause you not to renew your membership?

- a. Huge increase in dues (over \$100 a year)
- b. Cutting Chapters
- c. Society takes a political position against beliefs
- d. If not welcomed by other members/chapters

**Group 9:**

Royce Duncan (Facilitator)  
Deborah Reeder (Scribe)  
Lisa Conti-Bacon  
Nina Daigle  
Kirk Jarrett  
Jill Maslanka  
Margaret McConnell  
Josie Miller  
John Holden  
Denise Grove

Question 1: Is the GSCPA meeting your needs professionally and personally? What top three programs do you value; what are three programs that you do not feel are valuable? What additional programs would you like to see in the next 3-5 years?

Valued Programs:

- a. CPE/Web-based CPE
- b. Chapters
- c. Sections
- d. The Society is meeting needs very well; most of table concurred that CPE is the most valuable program from both their standpoint and that of the general membership. The group also agrees that chapters are an integral part of the membership and should continue to play a major role in the Society.
- e. The group was in agreement that the pricing of conferences for members was a very good value and opportunity for CPE with a targeted focus. Several mentioned pricing was one of the reasons they were attracted to a conference along with the opportunity to network and listen to excellent speakers.

The group felt that CPE pricing was quite reasonable and competitive. CPE constituted a great value for the price.

Least Valued Programs:

- a. Did not identify any; felt all existing programs were necessary.
- b. Recommendation: the timing of courses related to Yellow Book Audits could be improved. Since the group believed that most of the auditors performing this service would not also be involved heavily in tax season, the request was to place more of YB Audits in the spring. Currently, most of these courses are later in the year.

Question 2: What is your viewpoint of CPE in the future? What delivery options will you be using in the next few years? How does or can the GSCPA play into that?

CPE of the Future

- a. Focus, Focus, Focus: on web-based delivery of all types of CPE. More availability.
- b. Higher quality web-based programming
- c. Post-Podcast of conference sessions (group agreed that payment for these downloads with CPE credit is necessary and would utilize. They often have a conflict with the date of a conference, but are interested in the materials/subjects).
- d. Business writing and speaking skill courses for young CPAs. Market this via the Young CPAs Section. The group communicated their concerns over the number of young accountants/CPAs that do not write or speak well although they just graduated from college. They feel there is a need to promote this education in order to create a more professional group of CPAs in the next generations.

Question 3: What would cause you not to renew your membership?

- a. Concerns voiced regarding the new category of membership (i.e. Friends of the Society, Other Finance Professionals, etc)
- b. Need to consider carefully what types of career paths fit into this group
- c. Do not lower professional standard of the Society
- d. Do not make the Society a conglomeration of too many professions.