

**CHAPTER LEADERSHIP MANUAL**  
**2006**

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Dear Chapter President and Officers:

Thank you for agreeing to serve as the president or officer of your chapter. Like many of you, I began my involvement with the Georgia Society of CPAs by serving in my local chapter. In fact, local chapters have always been and will continue to be an integral part of the Georgia Society of CPAs. Many of today's Society leaders began by first serving in local chapters and tomorrow's leadership may well come from your chapter.

The mission of the Georgia Society of CPAs is to help members achieve their vision of the future by providing leadership in a changing environment; offering opportunities to learn and demonstrate skills critical to success; promoting and advancing the accounting profession; and fostering high standards of integrity and objectivity. That means the Georgia Society of CPAs is here to provide members with opportunities for success.

Success, however, must be defined and one of the best ways to define it is by setting goals. As president, you are responsible for setting the goals of your chapter for the next year and helping the chapter reach these goals. This manual is designed to help you be successful in this role.

Take advantage of every opportunity that may be presented; continue programs that have been successful in the past. But also don't be afraid to try a new program, plan a new event, promote the chapter in a new way; reach out to new members. Whatever your goals, I hope that you achieve success.

If you need assistance, certainly feel free to contact me, one of the Chapter Advocacy Subcommittee members, or any of the staff at the Society office. I look forward to meeting with you and your chapter members in the coming year.

Sincerely,

William D. Schneider  
GSCPA President, 2006-2007

# **GSCPA MISSION STATEMENT & CORE PURPOSE**

## **MISSION STATEMENT**

**THE MISSION OF THE GEORGIA SOCIETY OF CERTIFIED PUBLIC ACCOUNTANTS IS TO HELP MEMBERS  
ACHIEVE THEIR VISION OF THE FUTURE BY...**

- Providing leadership in a changing environment,
- Offering opportunities to learn and demonstrate skills critical to success,
- Promoting and advancing the accounting profession, and
- Fostering high standards of integrity and objectivity.

## **Core Purpose**

**GSCPA...PROVIDING MEMBERS WITH OPPORTUNITIES FOR SUCCESS.**

# EXECUTIVE SUMMARY

The Georgia Society of CPAs 2005 Leadership Manual is a tool to help you prepare for and manage your time as an officer in your chapter. The manual will cover how the Georgia Society of CPAs can assist you and what is expected of you in your role as an officer.

The Chapter Advocacy Sub Committee is your direct communication to the Society's Board of Directors, however, any member of the board or GSCPA staff is available to assist you. A complete listing of board members and GSCPA staff can be found in the chapter support section of this manual. Questions about chapter operations and special funding requests can be directed to them.

Each chapter officer has specific responsibilities to ensure that the chapter runs effectively and efficiently. Chapter officers should work closely with committees to provide the necessary information and support to chapter members. A suggested list of committees can be found on page 17. The manual also contains information on public relations, chapter financial responsibilities, resources available to the chapter and a recommended program to be used to install the chapter officers and representatives.

CPE is an important function and service for some chapter meetings. Information for hosting CPE programs is provided on page 30. All CPE programs must conform to the regulations of the State Board of Accountancy.

The GSCPA web site is a great tool to communicate with your members. Registration for meetings, new members and meeting updates can all be found on your chapter page. The chapter advocacy committee also has a page for chapter officers to find current information from their meetings.

Chapters are an important partner with The Educational Foundation of the Georgia Society of CPAs. Awarding scholarships is vital to the future of the profession and the Society. Information on the chapter matching funds program is available on page 37.

# 2006-2007 BOARD OF DIRECTORS

## **President –**

Bill Schneider 770-352-3352  
[bill.schneider@bellsouth.com](mailto:bill.schneider@bellsouth.com)

## **President-elect –**

Paula Mooney 912-852-3313  
[pmooney@bulloch.net](mailto:pmooney@bulloch.net)

## **Immediate Past President –**

Denise Mummert 404-898-2000  
[dmummert@windhambrannon.com](mailto:dmummert@windhambrannon.com)

## **Treasurer –**

Stewart Carlin 770-509-9800  
[scarlinacc@aol.com](mailto:scarlinacc@aol.com)

## **Secretary –**

Gary Julian 404-504-2932  
[gjulian@gscpa.org](mailto:gjulian@gscpa.org)

## ***Statewide Directors***

Colin Blalock 770-449-6695  
[ceb@joneskolb.com](mailto:ceb@joneskolb.com)

Scott Collins 706-546-1439  
[scollins@collinscpa.com](mailto:scollins@collinscpa.com)

Barbara Evans 770-431-3300  
[barbara.evans@thomasconcrete.com](mailto:barbara.evans@thomasconcrete.com)

Denise Grove 770-253-1974  
[dwgrove@cfo-support.com](mailto:dwgrove@cfo-support.com)

Scotty Jones 478-272-2030  
[sjones@tjscpa.com](mailto:sjones@tjscpa.com)

Joanne Kelly 404-627-1917  
[atljoanne@aol.com](mailto:atljoanne@aol.com)

Bob Prator 770-447-2703  
[rprator@t-u.com](mailto:rprator@t-u.com)

Donnie Roland 229-924-4456  
[dcroland@americus.net](mailto:dcroland@americus.net)

Richard Ross 404-832-8925  
[rross@branchprop.com](mailto:rross@branchprop.com)

# CHAPTER ADVOCACY SUBCOMMITTEE SUPPORT

The Chapter Advocacy Subcommittee has a responsibility to the chapters to give support whenever necessary, encouragement, and to assist in promoting the image of the profession. The Board has put together this subcommittee to serve as an advocate for all chapters. The following information outlines how the GSCPA is available to assist chapters.

- Help the Society and local chapters to accomplish their goals.
- Communicate Society goals to the entire organization.
- Monitor and evaluate accomplishments of goals.
- Communicate current legislative issues to chapters.
- Meet with presidents as a group.
- Communicate pertinent information from Board of Directors meeting.
- Be available to assist chapter presidents, when needed.
- Attend chapter meetings (upon request).
- Attend chapter executive meetings (upon request).
- Coordinate personal visitation by members of the Board of Directors to local chapters (upon request).

## CHAPTER ADVOCACY SUB-COMMITTEE

	<b>PHONE</b>	<b>EMAIL</b>
	_____	_____
Barbara Evans (Chair)	770-431-3300	barbara.evans@thomasconcrete.com
Denise Grove	770-253-1974	dwgrove@cfo-support.com
Joanne Kelly	404-627-1917	atjoanne@comcast.net
Donnie Roland	229-924-4456	droland@americus.net

# 2006 GSCPA STAFF

404-231-8676 or 800-330-8889 • Fax 404-237-1291 • [www.gscpa.org](http://www.gscpa.org)

	Ext.	
Gary Julian, Executive Director/COO	2932	<a href="mailto:gjulian@gscpa.org">gjulian@gscpa.org</a>
Donna Heavener, Associate Executive Director	2943	<a href="mailto:dheavener@gscpa.org">dheavener@gscpa.org</a>
Jan Roberds, Receptionist	2990	<a href="mailto:jroberds@gscpa.org">jroberds@gscpa.org</a>

## Accounting

Deborah Reeder, Director	2936	<a href="mailto:dreeder@gscpa.org">dreeder@gscpa.org</a>
Doris Almond, Accounting Manager	2954	<a href="mailto:dalmond@gscpa.org">dalmond@gscpa.org</a>
Pelar McDowell, Accounting Specialist	2955	<a href="mailto:pmcdowell@gscpa.org">pmcdowell@gscpa.org</a>

## CPE

Katrina Street, Director	2949	<a href="mailto:kstreet@gscpa.org">kstreet@gscpa.org</a>
Brian Abram, Exhibitor/Mail Services Coordinator	2951	<a href="mailto:babram@gscpa.org">babram@gscpa.org</a>
Alicia Atwater, Coordinator/Registrar	2944	<a href="mailto:aatwater@gscpa.org">aatwater@gscpa.org</a>
Lynne Carr, Conference Manager	2945	<a href="mailto:lcarr@gscpa.org">lcarr@gscpa.org</a>
Erin Mason, Meetings Coordinator	2950	<a href="mailto:ewolk@gscpa.org">ewolk@gscpa.org</a>
Lamar Chaney, Conference Center Maintenance	2947	<a href="mailto:lchaney@gscpa.org">lchaney@gscpa.org</a>

## Member Services

Shelly Grunbaum, Manager	2956	<a href="mailto:sgrunbaum@gscpa.org">sgrunbaum@gscpa.org</a>
Jennifer Poff, Coordinator	2939	<a href="mailto:jpoff@gscpa.org">jpoff@gscpa.org</a>
Don Cook, Sections Manager	2935	<a href="mailto:dcook@gscpa.org">dcook@gscpa.org</a>
Paige Brooks, Sections Coordinator	2937	<a href="mailto:pbrooks@gscpa.org">pbrooks@gscpa.org</a>

## Peer Review

Honorene Hazeur, Director	2940	<a href="mailto:hhazeur@gscpa.org">hhazeur@gscpa.org</a>
Donna Gould, Coordinator	2958	<a href="mailto:dgould@gscpa.org">dgould@gscpa.org</a>

## Public Relations/Communications

Betty Breen, Director	2941	<a href="mailto:bbreen@gscpa.org">bbreen@gscpa.org</a>
Jamie Etzbach, Manager	2933	<a href="mailto:jetzbach@gscpa.org">jetzbach@gscpa.org</a>
Sharon Woods, Coordinator	2934	<a href="mailto:swoods@gscpa.org">swoods@gscpa.org</a>



# 2006-2007 CHAPTER OFFICERS

<p><b>ALBANY</b>  <b>President: Brandi B. Ivy</b>            229-883-7878            BIvy@draffin-tucker.com  <b>Vice President: Ryan Inlow</b>            229-446-3600            rinlow@mjcpa.com  <b>Secretary: T. Heath Fountain</b>            229-420-0000            hfountain@eheritagebank.com  <b>Treasurer: Shawn Hendley</b>            229-883-7878            shendley@draffin-tucker.com</p>	<p><b>ATLANTA</b>  <b>President: Mike Levine</b>            678-461-0590            mlevine_us@yahoo.com  <b>Vice President: Lawrence Allen</b>            770-603-6122            lawrence.allen.cpa@gmail.com  <b>Treasurer: Steve Wakefield</b>            678-524-3100            steve.wakefield@legacybusinesspartners.com  <b>Secretary: Kris Clark</b>            770-980-1760            kjclark@gsu.edu</p>	<p><b>AUGUSTA</b>  <b>President: Lynda Curd</b>            706-724-2063            lynda@fullerfrost.com  <b>Vice President: Amy Horne</b>            706-868-5916            ahorne@clevelandanderson.com  <b>Secretary: Chris Etterlee</b>            706-724-2063            chris@fullerfrost.com  <b>Treasurer: Jenny Howard</b>            706-724-3557            jhoward@cbh.com</p>
<p><b>BUCKHEAD</b>  <b>President: Patti M. Richards</b>            404-846-3351            prichards@richardslawfirm.com  <b>Vice President: Geoffrey M. Rhines</b>            404-995-3698            geoffrey.m.rhines@marsh.com  <b>Secretary: Marcia M. Murray</b>            404-264-1400            murray@homrich-berg.com  <b>Treasurer: Julie E. Lamers</b>            404-250-4050            julie.lamers@reznickgroup.com</p>	<p><b>COASTAL GEORGIA</b>  <b>President: Angie Heys</b>            912-265-1750            aheys@mstilller.com  <b>Vice President: Penny Lumpkin</b>            912-267-0211            pennycb@bellsouth.net  <b>Secretary/Treasurer: Edward Bland</b>            912-265-7536            ebland@havencut.com</p>	<p><b>COLUMBUS</b>  <b>President: Kim Wise</b>            706-257-1153            kwise@thejordanco.com  <b>Vice President: Chris Miller</b>            706-324-5435            cmiller@robinsongrimes.com  <b>Secretary: Brad Clements</b>            706-571-9288            bclements@ajkllc.com  <b>Treasurer: Mary Ellen Heuton</b>            706-568-2144            heuton_mary@colstate.edu</p>
<p><b>DEKALB</b>  <b>President: Mary Rodriguez</b>            770-934-0568            mrodriguezcpa@yahoo.com  <b>Vice President: James Warren, Sr.</b>            770-922-4907            jimwarren@jimwarren-cpa.com  <b>Secretary: Jamie Musselwhite</b>            404-885-2123            jamie.musselwhite@turner.com  <b>Treasurer: Beverly Cox</b>            770-454-9307            b-cox@mindspring.com</p>	<p><b>WINNETT</b>  <b>President: Jack Milner</b>            678-473-0363            jmcballc@earthlink.net  <b>Vice President: Carlos Villegas</b>            770-945-8328            cvillegas@4estall.com  <b>Treasurer: Ed Holloway</b>            770-513-1573            echris82@aol.com</p>	<p><b>HEART OF GEORGIA</b>  <b>President: Spencer L. Tydings</b>            478-272-2030            stydings@tjscpa.com  <b>Vice President: Dana W. Ingrondo</b>            478-272-2030            dana@cktcpa.com  <b>Secretary/Treasurer: Carole G. Goings</b>            478-275-1163            cgoings@nicholscauley.com</p>

<p><b>MIDDLE GEORGIA</b>  <b>President: Holly McDowell</b>  478-722-6254  mcdowell@securitybank.net  <b>Vice President: Pamela Woodell Patterson</b>  478-994-2112  pwpcpa@aol.com  <b>Secretary: Pat Muse</b>  478-746-6277  pmuse@mmmcpcpa.com  <b>Treasurer: Kevin Lipford</b>  478-953-0125  Kevin@clhp.com</p>	<p><b>NORTH ATLANTA</b>  <b>President: Denise O'Connell</b>  770-422-0500  denise@moore-cubb.com  <b>Vice President: Bruce Clements</b>  678-787-0630  aclement@kennesaw.edu  <b>Secretary: Kathleen Ottman</b>  770-422-0500  ottman@moore-cubb.com  <b>Treasurer: Jim Ray</b>  404-630-1059  jim@raycpa.bix</p>	<p><b>NORTH PERIMETER</b>  <b>President: Brandon Verner</b>  770-457-7624  bverner@vpccpa.com  <b>Vice President: Richard Negus</b>  770-392-1541  negusandassoc@aol.com  <b>Treasurer: Larry Cohen</b>  770-801-0681  tax@wsatl.com  <b>Secretary: Kelly Cranford</b>  678-947-1799  kcranfor@gpc.edu</p>
<p><b>NORTHEAST GEORGIA</b>  <b>President: Jay Green</b>  706-886-7143  jaycpa@alltel.net  <b>Vice President: John Holden</b>  706-546-6194  jholden@rushtonandcompany.com  <b>Secretary: Darla Shuler</b>  770-534-7288 ext. 222  darlashuler@gibsondental.com  <b>Treasurer: Lee Ellen Fields</b>  706-886-3173  lefcpa@alltel.net</p>	<p><b>ROME</b>  <b>President: Earl Williamson</b>  770-382-3361 ext. 114  earlw@wcpas.com  <b>Vice President: Molly Edwards</b>  770-748-0910  rms_mhc@bellsouth.net  <b>Secretary: Jill Maslanka</b>  706-234-7571  maslanka@wjcpas.com  <b>Treasurer: Brad Reeder</b>  706-234-7571  brad@wjcpas.com</p>	<p><b>SAVANNAH</b>  <b>President: Cindy Wilson</b>  912-236-9100 ext. 104  Cwilson1978@g-net.net  <b>Vice President: Joe Farr</b>  912-844-0944  Jfarr844@comcast.net  <b>Secretary: Rob Cordasco</b>  912-719-5794  r.cordasco@comcast.net  <b>Treasurer: Lisa Conti-Bacon</b>  912-527-1324  lcontibacon@hancockskew.com</p>
<p><b>SOUTHEAST GEORGIA</b>  <b>President: Danny Key</b>  912-842-9547  dkeycpa@hotmail.com  <b>Vice President: Jill Buff Boykin</b>  912-486-1702  jill.boykin@egrmc.hma-corp.com  <b>Secretary/Treasurer: Perry Rountree</b>  912-489-8756  perryrountree@yahoo.com</p>	<p><b>SOUTHSIDE</b>  <b>President: Janis Phillips</b>  770-969-9712  jdphillips@ajc.com  <b>Vice President: Mario Heard</b>  404-763-9445  heard78@yahoo.com  <b>Secretary: Raelene Swordsma</b>  770-251-2288  rswordsma@cbh.com  <b>Treasurer: Tom Bailey</b>  770-898-4284  tbailey@bfwcpa.com</p>	<p><b>SOUTHWEST</b>  <b>President: Jerry D. Maxwell</b>  229-246-9700  maxcpa@bellsouth.net  <b>Vice President: Roy Long</b>  229-228-5537  roylong@perkinslongcpas.com  <b>Secretary: James H. Douglas</b>  229-377-0020  jdouglas@syrupcity.net  <b>Treasurer: Ashley Gardner</b>  229-246-1511  ashley@youmansgardner.com</p>
<p><b>VALDOSTA</b>  <b>President: Ginger Keesling</b>  229-247-6314  gkeesling@svacpa.com  <b>Vice President: Rebecca Brice</b>  229-242-2233  rbrice@awgpc.com  <b>Secretary: Arden Deloach</b>  229-244-1559  adeloach@valdostacpa.com  <b>Treasurer: Kevin Hiers</b>  229-245-6040  khiers@hgncpa.com</p>	<p><b>WAYCROSS:</b>  <b>President: Larry Taylor</b>  <a href="mailto:lct@byrt.com">lct@byrt.com</a>  912-283-8889  <b>Vice President: Eddie Thomas</b>  efthomas@accessatc.net  912-632-7222  <b>Secretary: Debra C. Yonz</b>  dcy@byrt.com  912-283-8889  <b>Treasurer: Earl Spivey</b>  espivey@wayxcable.com  912-283-3903</p>	<p><b>WEST GEORGIA:</b>  <b>President: Sondra Smith</b>  770-258-0429  sondras@westga.edu  <b>Secretary: Kathy Moffeit</b>  770-214-8979  kmoffeit@westga.edu  <b>Treasurer: Trent Marlow</b>  770-214-9301  marlcpa.yahoo.com</p>

# CHAPTER SUPPORT RESOURCES

The following information is designed to enable the officers of the various chapters of the Georgia Society to more effectively use the resources and services of the Society office in their year of service. If you have any questions or concerns, please do not hesitate to call Jennifer Poff at 800-330-8889 or 404-231-8676, ext. 2939; email [jpoff@gscpa.org](mailto:jpoff@gscpa.org) or Donna Heavener, ext. 2943; email [dheavener@gscpa.org](mailto:dheavener@gscpa.org).

## Chapter Information Forms

The Chapter Information Form should be completed following the first meeting of the chapter to provide the latest contact information for the GSCPA staff. The form is on page 8.

## Chapter Officer Plated Name Badges

The GSCPA will order plated name badges for chapters who request them for their officers. The cost is \$10 per badge which includes shipping. If you are interested in purchasing badges for your officers, please contact Jennifer Poff at [jpoff@gscpa.org](mailto:jpoff@gscpa.org).

## Chapter Snip-Its

A monthly e-mail will be sent out to all chapter officers with current Society information to keep you informed of current happenings at the GSCPA. This information can also be used in your monthly newsletters for your members.

## Promotional Items

The GSCPA will assist chapters in obtaining promotional items to distribute at chapter events. If you are interested in purchasing promotional items for your chapter, please contact Jennifer Poff. The form is on page 9.

## Label Request Form

The person designated on the Information Request Form will receive the labels automatically each month. Please complete this form and return to Jennifer Poff as soon as possible. We will not send more than one set of labels at a time because of the frequency of address changes. If you need an extra set at any time, call Jennifer Poff. The form is on page 10.

## Chapter Name Badges & CPE Credit Forms

Stick on name badges are available for the chapter to use at any time. CPE credit forms and backup sheets are also available upon request at no charge.

## New Chapter Members

A list of new members in your chapter will be sent each month. We encourage each chapter to form a membership committee to welcome new members and encourage their involvement.

## Change of Address

When a chapter member gives you a change of address or company/firm name change, please forward this information to the Society office to the attention of Member Services Department. If you have a situation where someone has moved and did not leave a forwarding address, we cannot take them off our computer system completely because they are still Society members.

## **Membership Applications**

These applications are available at any time from the Member Services department. Also available are complete brochures that can answer questions concerning membership in the Society.

## **Student Membership Applications and Student Outreach Materials**

GSCPA Student membership includes freshman, sophomore, juniors, seniors, and fifth year students. Student applications for membership are available at any time from the Member Services department. Also available are student related brochures and handouts.

## **Chapter Deadlines to the State Society Office**

New chapter officers should be reported to Jennifer Poff by March 1, each year. Nominations for new officers should be held at your chapter meeting in January. Information on the new chapter officers needs to be sent as soon as possible after that date. The chapter officer form is on page 11.

Some chapters do not meet during tax season; so if your chapter falls into that category, please make arrangements to take care of this matter before March 1.

When you submit your chapter officers to the Society office, please include the following information:

- President
- Vice President
- Secretary
- Treasurer
- Chapter Representative
- Chapter Nominee to the State Nominating Committee

Also include mailing address, phone number and email address.

## **Leadership Academy**

In the spring the chapter will be asked to nominate someone for the Leadership Academy. This highly successful program, modeled after "Leadership Georgia", teaches participants leadership skills and expertise that they will use in their firms and their communities as they advance in their career. Skills taught in this program are not learned in traditional programs; they are unique to the leadership training program.



## 2006-2007 Chapter Information Form

Chapter: \_\_\_\_\_

Chapter Address: \_\_\_\_\_

City: \_\_\_\_\_ Zip: \_\_\_\_\_

Meeting Place: \_\_\_\_\_ Meeting Cost: \_\_\_\_\_

Meeting Day(s): \_\_\_\_\_ Meeting Time: \_\_\_\_\_

Chapter Email Address: \_\_\_\_\_

Person that receives email registrations: \_\_\_\_\_

Web-site Content Contact Person: \_\_\_\_\_

Newsletter Contact Person: \_\_\_\_\_

New Member Contact Person: \_\_\_\_\_

Student Member Contact Person: \_\_\_\_\_

Label Contact Person (if you do mailings): \_\_\_\_\_

Program –CPE Contact: \_\_\_\_\_

Special Events held by your chapter: (Please add any additional information that is unique to your chapter)

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**Please fax completed form to Jennifer Poff by June 28, 2006.**

FAX: 404-237-1291



## CHAPTER PROMOTIONAL ITEMS Order Form

If your chapter is interested in ordering any of the following promotional items, please indicate the quantity needed. All items will have the GSCPA logo imprinted, except for the highlighter that will only have Georgia Society of CPAs. GSCPA will pay for initial order and set-up charges: chapters will only be billed for the number of items ordered plus tax and shipping.

<u>Item</u>		<u>Quantity</u>	<u>Total Cost</u>
Notepads 8 1/2" x 5", silver spiral bound, lined	\$1.82 ea	_____	\$ _____
Highlighters*	\$.90 ea	_____	\$ _____
Coffee Mugs*	\$2.50 ea	_____	\$ _____
Mint Tins	\$3.00 ea	_____	\$ _____
Tumblers	\$4.50 ea	_____	\$ _____

\*Minimum total order for highlighters is 200 and for coffee mugs is 144. If we cannot make the minimum order with all chapter orders, we will not be able to order these items.

**DEADLINE FOR ORDERING:      September 24, 2006**

**Please fax completed form to Jennifer Poff by September 24, 2006.**  
FAX: 404-237-1291



CHAPTER LABEL REQUEST FORM  
DUE BY JUNE 20

CHAPTER: \_\_\_\_\_

LABELS:

- All Members
- Members without e-mail
- Excel Spreadsheet (will print labels on own)

Mail to: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Labels will be sent at the end of the month.

**Please fax completed form to Jennifer Poff.**  
FAX: 404-237-1291



**CHAPTER OFFICERS 2007-2008**  
Due March 1, 2007\*

**CHAPTER:** \_\_\_\_\_

**PRESIDENT:** \_\_\_\_\_

ADDRESS: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_ EMAIL: \_\_\_\_\_

**VICE PRESIDENT:** \_\_\_\_\_

ADDRESS: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_ EMAIL: \_\_\_\_\_

**SECRETARY:** \_\_\_\_\_

ADDRESS: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_ EMAIL: \_\_\_\_\_

**TREASURER:** \_\_\_\_\_

ADDRESS: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_ EMAIL: \_\_\_\_\_

**CHAPTER REPRESENTATIVE TO COUNCIL:** \_\_\_\_\_

EMAIL: \_\_\_\_\_

**NOMINEE FOR STATE-NOMINATING COMMITTEE:** \_\_\_\_\_

EMAIL: \_\_\_\_\_

**\*Nominations for Chapter Officers should be held during the January meeting.**

**Please fax completed form to Jennifer Poff by March 1, 2007.**

FAX: 404-237-1291



# CHAPTER PRESIDENTS' RESPONSIBILITIES

Chapter presidents have a responsibility to their members and to the Society. Listed below is an outline of duties to assist presidents in the upcoming year.

- Meet with the Leadership Team to plan the coming year.
- Plan and hold regularly scheduled meetings.
- Represent chapter at semi-annual Council meetings.
- Communicate with, and welcome, new members to the chapter.
- Implement new ideas and programs to move chapter forward (i.e. promotional endeavors).
- Recommend a replacement for officers who are unable to complete term.
- Report incoming officers and any replacement throughout the year to the Society office.
- Organize and hold elections for the next year.
- Serve as a conduit for disseminating information on important issues facing the profession (i.e. Peer Review, etc.).
- Promote Society objectives (i.e. Educational Foundation, CPE, etc.).
- Notify Society office of news about members (i.e. deaths, mergers, etc.).
- Plan participation in Educational Foundation Scholarship and Awards programs.
- Provide reports of chapter activities and/or impending events to the Chapter Advocacy Sub-Committee.
- Communicate chapter problems to the Chapter Advocacy Sub-Committee in a timely manner.

# OFFICERS & EXECUTIVE COMMITTEE DUTIES

The record of your administration will depend somewhat upon the successful completion by the officers, executive committee and committee chairmen of their various responsibilities. Since you and the other officers were chosen on the basis of demonstrated ability and your interest in promoting the professional interests of CPAs, you are aware of the challenge. Moreover, remember that the status of your chapter in the community and the effect of its entire public relations program depend to a great extent upon the energy and performance of the officers, executive committee and committee chairmen.

Following is a listing of suggested functions and duties of the officers. These job descriptions may vary depending upon the size of your chapter and specific provisions of your chapter's bylaws; however, they are somewhat typical and present a guide to follow.

## **President:**

You are the chief executive officer of your chapter and have the direct responsibility to coordinate the functions of all chapter activities and see that goals and objectives are implemented in a successful manner during the chapter year. Following is a partial list of repetitive duties:

1. Preside at all chapter meetings.
2. Issue calls, plan the agenda and conduct the meetings of chapter's executive committee.
3. Appoint the committee chairpersons (and suggest committee members), and constantly monitor and evaluate the progress of all committees, either directly or through other chapter officers having direct coordination responsibilities.
4. Represent your chapter at the Society Council meetings and the Society annual meeting.
5. Work closely with the Society staff.
6. Assist in the transition of your successor in office at the end of your chapter year.

## **Vice President and/or President-elect:**

A good chief executive officer learns that delegation with proper follow up is a key to successful chapter operation. In smaller chapters, it may be desirable for the chapter vice president to be chairman of the program committee -- an important assignment befitting the office and encouraging participation. In larger chapters, the vice president should have direct coordination responsibilities over certain committees. In all chapters, the vice president is considered the secondary executive officer and acts for the president in case of absence or disability.

## **Secretary:**

The main duties of the secretary are:

1. Maintain the chapter membership records and assist the Society staff in maintaining an up-to-date record of all members' mailing addresses, firm affiliations, and other pertinent information.

2. Record the minutes of all board meetings and distribute copies to all officers and board members.
3. Issue notices for the chapter and executive committee meetings and other special meetings as may be necessary.
4. Maintain chapter files and supplies.
5. Provide to (a) the Society office and (b) the current Chapter Advocacy Chair, on a timely basis, a report of chapter activities that includes information on recent and future chapter meetings, professional development programs, membership statistics, public relations activities, materials and other information that communicates all chapter activities.

**Treasurer:**

The specific duties of the treasurer are:

1. Deposit receipts and issue all checks.
2. Maintain financial records.
3. Reconcile bank statements.
4. Furnish a financial report at all executive committee meetings.
5. Prepare a budget prior to the beginning of the year for approval by the executive committee. In larger chapters, the budget preparation may be a joint effort with a finance committee.
6. Provide the Director of Finance and Administration of GSCPA with chapter annual financial statements, including year-end bank reconciliation(s) and a copy of each year-end bank statement no later than one month following fiscal year-end. Note that this information is used to file a group tax return.
7. Provide to the Director of Finance and Administration of GSCPA, no later than March 1, a confirmation of chapter dues to be invoiced for the following year or the new amount, if changed.
8. Confirm that all bank accounts are held under the correct Federal Identification Number previously issued to the chapter as kept on file with the GSCPA Director of Finance and Administration.

**Executive Committee:**

The chapter's executive committee is responsible for establishing policies of the chapter and representing the membership. Specific responsibilities of executive committee members are:

1. Attend all meetings and constructively consider the chapter's activities.
2. Keep informed as to the purpose of all meetings and act as liaison between the membership and the officers.
3. Assist in the operation of executive committee meetings by speaking on the major purposes as outlined in the agenda.

# COMMITTEE ORGANIZATION & OPERATION

The success of your administration will largely be measured directly by the work of the committees you appoint. Committees are the motivating force that enables the chapter to function effectively. They develop ideas for carrying out existing policies, framing new policies and implementing the program of activities that falls within their scope of interest and responsibility.

## 1. Responsibilities of Committee Chairmen

Each committee chairman should be selected with great care. Generally, the president and other officers spend several hours, sometimes days, selecting the best-qualified person to exercise leadership in a specific area. Where applicable, it is usually a good idea for achieving maximum coordination that you appoint as committee chairmen those members who are serving on a corresponding Society committee.

Good chairmen reflect confidence and act in a positive manner. In addition to being organized, their actions reflect sincerity, enthusiasm, fairness and decisiveness. Their job is to preside rather than be opinionated, and the success of their committee's activities is measured by the extent to which they are able to lead the committee members to the completion of specific projects.

To discharge their responsibilities properly, committee chairmen must hold meetings and organize and conduct those meetings in a manner similar to that prescribed for other professional meetings. Members should be given adequate notice together with a definite agenda. Aimless discussion should be avoided.

Some of the essential elements of completing a productive committee meeting are:

- a. Calling the meeting to order on time.
- b. Maintaining order and proper dignity.
- c. Insuring that everyone has the opportunity to speak.
- d. Deciding points of order promptly and fairly.
- e. Giving proper credit for assistance received.
- f. Knowing when to call the meeting over at an appropriate time.

## 2. Responsibility of Committee Members

Committee members should be selected because of an expressed interest in a particular phase of the chapter's work. You will find that the contributions are greater if the members have a direct interest in a particular committee's scope of responsibilities. They should consider it their duty to participate in meetings, to keep in touch with their chairman and to be careful at all times that they do not speak for their committee unless so authorized.

A committee member should be appointed secretary of each meeting so that minutes can be compiled. Copies of these minutes should be distributed to the president of the chapter and the director at large of the state Society coordinating the chapter activities. In addition, all committee members should receive copies. These minutes, together with any other files and materials, should be passed to the chairman of the succeeding committee in order that there will be a continuity of effort.

Some of the necessary and important committees (or committee groups), together with comments as to their responsibilities, are listed in the following sections.

### 3. **Chapter Meetings - Arrangements, Attendance, Reception and Programs:**

Chapter meetings should be held monthly, at least during the period beginning September and ending in May of each year. A desirable practice is to establish specific meeting dates; e.g., the third Wednesday of each month. More than any other chapter activities, these meetings are a means of bringing members together to exchange personal views and enjoy good fellowship.

The responsibilities in this area can be divided among several different committees.

- a. Responsibility for arrangements. They should arrange for the meals including guaranteeing the number thereof, insuring adequate bar facilities, handling the sale of meal and drink tickets, accounting for the receipts and disbursements and report to executive committee as to attendance, financial results and any problems encountered regarding the facilities, etc. Specifically, this committee should be responsible for the head table - nameplates and seating arrangements, particularly.
- b. Another committee could be charged with attendance and reception, including promoting attendance at all chapter meetings by writing letters, articles in a newsletter, personal telephone calls, etc. They should greet members and guests as they arrive and continually suggest methods of improving attendance at all chapter functions. This committee should specifically be responsible for all guests, except the speaker.
- c. The program committee should plan and coordinate the programs for the ensuing year and secure the speakers. In planning the program and selecting speakers, the committee should secure approval of the chapter's officers and/or executive committee. The committee should see that all arrangements for speakers are made, secure pictures and biographical materials and handle the hospitality for the speakers. Finally, this committee should arrange for a person to introduce the principal speaker.

### 4. **Membership, Newsletter and Entertainment:**

- a. One of the more important committees for your chapter is Membership. This committee should continually work at increasing your chapter membership. The committee should contact those members who do not pay their Society and chapter dues within a reasonable time and encourage them to retain their membership. They should contact other members who resign and also assist the Society in collecting delinquent dues. Lists of new members in your chapter are sent to you on a monthly basis from the Society office, and contact should be made with these members encouraging them to become active in your chapter.
- b. A chapter newsletter is a valuable means of stimulating interest among members. A monthly publication is usually desirable, but it may be published at other intervals best suited to your individual chapter. This newsletter should report on upcoming events, provide biographical sketches of speakers and new members, outline the subject of the next chapter meeting and relate current professional news or personal items concerning members.
- c. A chapter may have an Entertainment committee that plans social activities suitable to and acceptable by the chapter's membership. As with any other chapter activity, the arrangements and costs should be submitted to and approved by the chapter's executive committee.

## 5. **Continuing Professional Education (CPE) and Related Committees:**

Continuing education and professional development is probably one of the largest areas of participation by the members of your chapter. The chapter CPE committee should be responsible for the planning and promoting of an active chapter CPE program to serve local members. Each chapter committee chairman shall work in close cooperation with the Society's CPE coordinator to determine the number, subject and dates of chapter seminars to be scheduled at local levels.

The chapter CPE committee chairman and/or their committee members should perform the following functions:

- a. Recommend and secure hotel, motel or other meeting facilities to be used for each chapter seminar to be conducted.
- b. Provide liaison and active channels of communication between chapter and Society office staff or the state CPE committee on all professional development details concerning seminar presentations or other matters.
- c. Provide, in a timely manner, attendance lists of chapter programs that qualify for CPE credit to the Society's CPE department for maintenance of CPE credit.
- d. The chairman of the chapter CPE committee should consult with the chapter president in the selection of course topics to be offered, establish tentative dates for courses so selected and evaluate and report on completed courses and discussion leaders.

**Please refer to the CPE section of this manual for additional information related to continuing professional education credits.**

In keeping with the directive to provide CPE for chapter members, no chapter may promote its CPE activities outside its own members unless the chapter receives permission from the other chapters. Chapters may not promote its CPE to GSCPA Members-at-Large.

## 6. **Public Relations and Cooperation with Others:**

One of the more important activities in your chapter should be in the area of public relations. This area includes cooperation with attorneys, bankers, educational institutions, Internal Revenue Service employees, legislators, etc. Many chapters have separate committees for each of the areas of cooperation, aiming to invite certain groups as guests to specific chapter meetings, in addition to cooperating with them in other joint and mutually beneficial endeavors.

The members should be made aware of their responsibilities to the community and other professions as well as the client. Many times a program of news releases, prepared articles, an organized speaker's bureau and specially prepared public service brochures are of help. In all of these activities, the facts about the profession should be emphasized and the prestige accentuated. Members should be encouraged to participate in the affairs of other professional societies, civic organizations, as well as national, state and local chambers of commerce.

A planned program for releasing items to newspapers in your area on chapter meetings, new members and other matters of interest to the profession is important. The more interesting the information is to a wide readership, the better its news value. Events at a chapter meeting may be good news for the Society news publications and for the hometown newspaper. Information or advice on news releases and media contacts can be received from the Society's public relations department. (See Exhibit A)

Your public relations committee chairman will find it very helpful to coordinate the committee's activities closely with the efforts of the Society public relations department.

**7. Nominating Committee:**

The Nominating Committee nominates candidates for the officers of the chapter, directors to the Society Board of Directors and a representative for the Society nominating committee.

In many chapters, the chairman of the chapter Nominating Committee is the immediate past president, and the other members are two (or more) other active past chapter presidents. The committee should develop and study a list of members who have made outstanding contributions to the profession and who have demonstrated interest and leadership in chapter or Society activities.

**8. Other Possible Committees:**

There are certain other committees to handle areas of responsibility that may be needed to complete the overall program for your chapter year. Either a committee, or at least one member in your chapter, should be responsible for practice continuation. If one member is appropriate in your chapter, assistance may be gained from the Society in giving emergency assistance to those interested in a deceased member's practice in your chapter area.

Additionally, there should be a Public Affairs committee to encourage interest in governmental affairs and to promote the acquaintance of members with representatives in your area. Proposed legislation affecting the profession should be studied and commented upon.

There may be other committees necessary to disseminate information on professional ethics and the like. Another important committee is Members in Industry, Government and Education. This committee's charge is to encourage attendance of members in industry, government and education in all chapter functions, emphasizing meeting attendance, committee involvement as well as promotion and development of technical meetings particularly benefiting their area. Additionally, many chapters have some type of long-range objectives and planning committee.

Perhaps the last committee to suggest is one for awards and special projects. In establishing your chapter's goals and objectives for the coming year, a method should be devised to recognize those members performing an outstanding service to the profession. Excellence in motivation is a rare quality among leaders. Methods of recognizing outstanding time, effort and thought contributions make your job as chief motivator simpler.

# EXHIBIT A

## NEWS RELEASES

There are three ways to present news to the media:

- a. Inviting a reporter to be present at the event to be covered.
- b. Writing and submitting a news release.
- c. Calling the editor or a reporter to pitch them the story. Good judgment must dictate which method should be used. The direct call should be used as little as possible and only when there is spot news, such as the results of an important chapter meeting.

The writing of a news release is the most desirable. Here are a few simple rules for the preparation of releases:

1. Double-spaced, using one inch margins on all sides.
2. State at the top of the page the name, address, telephone number and web site of the organization or the name of the organization, your own name, address, telephone number and email address.
3. Indicate the date to be released or write "For Immediate Release".
4. Include in your opening statement answers to the five W's - who, what, when, where, and why.

Newspapers want facts, but they should be made interesting as the facts themselves permit.

Observe these simple rules when preparing releases or articles:

1. Use ingenuity.
2. Strive for the unusual in subject matter and treatment.
3. Avoid run-of-the-mill handouts.
4. Remember reader interest.
5. Prepare the release in standard Associated Press style.
6. Quote an authority for every statement made.
7. Fact check that all your information is true and valid.
8. Avoid evaluating publicity in terms of free advertising.
9. Put yourself in the role of the readers, and angle your copy to their viewpoint.



Remember that an editor's test for publicity is: Is it news? Does it contain the same factual material we might have obtained if we sent our own reporter? Do we believe it to be as truthful and accurate as if our own reporter had obtained the story direct from the principal?

Building rapport with you local media contacts is equally as important as correctly preparing your release. Know which reporters cover what beat. Be aware of journalists' deadlines. Use the media list prepared by the Society's public relations department for contact information of local publications.

In your area, there are undoubtedly trade and organization publications that would welcome articles from the profession. Some of these articles might be general in nature, designed to tell about the accounting profession; others might be pointed to specific problems incident to the publications in which they appear. As you discover the need and desire for such articles, the committee may wish to call on members of the chapter to prepare the material for publication. This activity is extremely important.

# INSTALLATION OF CHAPTER OFFICERS & REPRESENTATIVES

## Guideline

I WOULD LIKE TO ASK THE FOLLOWING ELECTED OFFICERS FOR 20\*\* -20\*\* OF THE \_\_\_\_\_ CHAPTER TO COME TO THE FRONT OF THE ROOM:

President:  
Vice President:  
Secretary:  
Treasurer:

Chapter Representative:

Congratulations to each of you!

Your fellow members have expressed their confidence in you by electing you to positions in your chapter for the coming year. It is both an honor and a responsibility. The job is a demanding one, but the time, effort and thoughts you contribute will be more than rewarded by the satisfaction of completing a job well done.

Fortunately, plenty of help is available. The other members of your chapter, together with the officers and directors of the Georgia Society, are willing and able to assist you. Perhaps the most immediate and direct help will be gained from your predecessor in office, the Society's Chapter Advocacy Sub-Committee and your Society staff. The Society staff will be helpful as they are trained to provide assistance to insure maximum coordination.

I would like to remind each of you of the objectives of this chapter before instating you in your position. Those objectives are:

1. To advance the interests of Certified Public Accountants of the State of Georgia
2. To cultivate a spirit of fellowship and professional cooperation among its members
3. To provide continuing professional education to its members
4. To promote high standards of professional practice and ethical conduct
5. To promote the study of accountancy and of laws appertaining thereto
6. In general, to promote the better recognition of the practice of accountancy as a profession.

I charge each of you to strive for the fulfillment of these goals in this chapter this year.

I now proceed to install you into your respective offices.

<<State Name>>, as President, you are the chief executive officer of the chapter and are responsible for its successful operation during your term of office. The President shall preside at all meetings of the chapter and of the chapter's Executive Committee. The President shall also appoint committee chairpersons, represent the

chapter at meetings of the Council of the Georgia Society of CPAs, enforce the bylaws of the chapter and shall perform such other duties as appropriate to this office. If you will accept this responsibility, say I will.  
(response – “I will.”)

<<State Name>>, as Vice President of the chapter, you shall in the absence of the President, carry out all of the duties of the President and perform such other duties as are designated by the President. The Vice President shall be designated as President-elect. If you will accept this responsibility, say I will.

<<State Name>>, as Secretary, you shall be responsible for the maintenance of chapter membership records, minutes of meetings of the chapter and of the Executive Committee and carry out such other duties as are designated by the President. If you will accept this responsibility, say I will.

<<State Name>>, as Treasurer, you shall have the responsibility for all securities and funds of the chapter. The Executive Committee shall designate the depository bank and investments shall be made only after approval by the Executive Committee. You shall keep an account of all receipts and disbursements and shall render a full report annually or more often as requested by the Executive Committee. When directed, you shall prepare the budget for the fiscal year of the chapter. You shall provide your full annual report to the GSCPA Director of Finance and Administration so that the group tax return may be filed. If you will accept this responsibility, say I will.

<<State Name>>, as Representative of the chapter, you will serve a one-year term on the Council of the Georgia Society of CPAs and will carry to that body the concerns and desires of your chapter. It is your responsibility to represent your chapter, along with the President, at each of the two Council meetings during the year. If you will accept this responsibility, say I will.

As a representative of your State Society, I declare each of you duly instated to your respective position and wish you much success this year.

# FINANCING FOR LOCAL CHAPTERS

Chapter officers need to have a clear understanding of the funds that are available from the GSCPA for chapter operations. Funding for chapter activities is provided through direct allocation (matching funds for chapter dues), chapter dues and special event funding. The matching funds and special event funding is approved by the Board of Directors.

Each local chapter will receive a minimum allocation of \$2,000. Chapters that charge chapter dues will receive up to \$10 matching funds for each renewing member or new member who pays their chapter dues. For example, if a chapter charges chapter dues of \$20 per member, the GSCPA will forward the chapter \$20 for the collected dues plus pay \$10 matching funds. If a chapter charges \$10 or less chapter dues, the Society will match the amount charged for dues. If a chapter charges no dues, they will receive the minimum allocation of \$2,000.

Chapter dues and the matching fund allocation will be forwarded to the chapter treasurer by July 31 each year, for all dues received by June 30. All members who have not paid their dues in full will be dropped by September 30. The final payment, for dues received between July 1 and September 30, will be forwarded to the chapter treasurer by October 31.

## Requests for Additional Funding of Special Events

There are certain events for which chapters may request additional funding from the Georgia Society of CPAs. The Board of Directors approved a general description of those events as follows:

Events that are considered for funding by the Board will include events that are of value to the chapter, that coincide with the chapter's/society's mission and vision, and that are beneficial to the community and/or the accounting profession. For example, a program or event used for student outreach would likely be approved. Chapters will need to use their own judgment as to what programs are of value to their particular chapter.

Requests for approval of funding should be submitted in writing to the GSCPA office **in advance** of the event. The form can be found on page 27. The request should define what the chapter is trying to accomplish (i.e. purpose), how the chapter will accomplish said task, event cost, and how they will measure the results. If funding is approved, the chapter should submit a follow up report summarizing the effectiveness of the program. The form is on page 28. Approval of special event requests is not guaranteed. The Chapter Advocacy Subcommittee will review all requests and make recommendations to the Board for approval.

Funding is decided prior to the event and is based upon the projected cost of the event. To receive these funds:

1. All requests for approval of funding for special events should be submitted to Jennifer Poff at the GSCPA office. You may email Jennifer at [jpoff@gscpa.org](mailto:jpoff@gscpa.org) or you may mail them to her at 3353 Peachtree Road NE, Ste 400; Atlanta, GA 30326-1414.
2. **All requests for approval of funding should be submitted to GSCPA in advance of the event.**
3. When funding is approved, the chapter should submit a follow up report summarizing the effectiveness of the program including the request for reimbursement. The form is included on page 28.

## Chapter Financials

Each year the executive committee of the chapter should approve a budget projecting cash receipts and disbursements for the ensuing year. The chapter treasurer should present financial statements reflecting the cash receipts, disbursements and balance for the preceding month and for the year-to-date. All transactions should be within the budgeted amount or should be approved in advance by the executive committee.

Chapter officers are the trustees of the funds for the chapter. The treasurer is responsible for handling all financial records and should retain documentation supporting both receipts and disbursements. Two officers should sign checks.

Chapter financials may be prepared during the year on a cash basis. Year-end financial statements should be prepared on the cash basis.

Each chapter should submit their Annual Statement of Receipts and Disbursements for the fiscal year ending May 31, along with a copy of the bank statement(s) for the month ending May 31, and a copy of the bank reconciliation(s) for the month ending May 31. This information is required to file the Society's Form 990.

### **Chapter Federal ID#**

Each chapter has their own Federal ID# which begins with a 91-XXXXXXX. This number should be used as the FEI number on the bank account. If you do not know your chapter's FEI number, contact the Director of Finance and Administration at the GSCPA office.

### **Form 990 Group Return Authorization**

The GSCPA files Form 990 as a group for the chapters. Each year an officer of the chapter must sign Form 990 giving authorization for processing the tax return on their behalf. The form is on page 25. The Director of Finance and Administrations will forward the required form to chapter treasurers for completion toward the end of the fiscal year.

All chapter addresses are listed with the IRS as The Georgia Society of CPAs address: 3353 Peachtree Road NE, Suite 400, Atlanta, GA 30326-1414. **Do not change this address with the IRS.** Should you receive any correspondence from the IRS, please forward it to the Director of Finance and Administration at the GSCPA.

*All items due by June 30<sup>th</sup> each year.*

**AUTHORIZATION FOR INCLUSION  
IN FORM 990 GROUP RETURN**

You, the Georgia Society of Certified Public Accountants, Inc., are hereby authorized to include us, the \_\_\_\_\_ Chapter, in a group return of Form 990 for the year ended May 31, 2007.

Signed \_\_\_\_\_ Title \_\_\_\_\_

Print Name \_\_\_\_\_



**Request for Approval of Funding for Chapter Special Events  
(to be submitted prior to event)**

<b><i>DATE OF REQUEST</i></b>	
<b><i>NAME OF CHAPTER</i></b>	
<b>PRESIDENT</b>	
<b>PRESIDENT PHONE #</b>	
<b>PRESIDENT E-MAIL</b>	

<b>PROGRAM OVERVIEW</b>
<b><i>PROGRAM TITLE</i></b>
<b><i>PROGRAM DATE</i></b>
<b><i>OBJECTIVE</i></b>
<b>EXPECTED NUMBER OF GUESTS</b>
<b><i>EXPECTED NUMBER OF ATTENDEES</i></b>
<b>EXPECTED COSTS – Provide detail of all costs expected (food, beverage, giveaways, publicity, etc.)</b>

Please fax completed form to Jennifer Poff.  
Fax: (404) 237-1291



**GSCPA REQUEST FOR REIMBURSEMENT  
OF CHAPTER SPECIAL EVENT**

DATE OF REQUEST: \_\_\_\_\_ REQUESTED BY: \_\_\_\_\_

DATE OF EVENT: \_\_\_\_\_ DESCRIPTION OF EVENT: \_\_\_\_\_

(A) Total Cost of Special Event:

(B) Cost of Food & Beverage: \_\_\_\_\_

(C) Total number of persons in attendance: \_\_\_\_\_

(D) Chapter Members: \_\_\_\_\_

(E) Guests: \_\_\_\_\_

(G) Cost per person in attendance: \_\_\_\_\_

(H) Total reimbursement request:

(I) Total reimbursement approved\*:

CHAPTER: \_\_\_\_\_

MAIL REIMBURSEMENT TO: \_\_\_\_\_

\_\_\_\_\_

**\* Reimbursement based on pre-approval of event.**

**Please fax completed form to Jennifer Poff.**

**Fax: (404) 237-1291**



# ELECTRONIC COMMUNICATION

## \*Chapter Website Updates

Jennifer Poff, GSCPA Member Services Coordinator, is the contact for all changes and updates to the chapter web pages. All files and changes must be submitted with a **three day advance notice**. Documents to be updated should be in the following formats: Word document \*.doc; Adobe Acrobat \*.pdf; Text Document \*.txt.

The main page for all of the Georgia Society of CPAs chapters will be standardized to include the following information:

- A summary of the chapter history, members, location, etc.
- Student/New Member Contact information
- Chapter officers and directors along with contact information
- Chapter State Representative along with contact information
- Summary of chapter meetings: usual date, time, and location
- Current meeting information including speaker bios and meeting topics
- An online registration form for chapter meetings and/or events
- Directions to the current meeting location

In addition, the home page will include links to the following:

- CPE Courses offered by the chapter
- Chapter newsletter
- Meeting or speaker outlines
- Student outreach information
- A listing of new associate and fellow members
- A GSCPA Membership Application as well as a GSCPA Student Member Application
- Chapter recommended links ('Our Favorite Links')

All of the above information is not *required* on individual chapter websites. However, chapters can not add additional information to their home page besides what is listed above.

All chapters' home pages will have a link to an 'Additional Chapter Information' page. This page can contain any information that is not listed above. Some topics to incorporate on this site, suggested by the Georgia Society of CPAs, include:

- Chapter sponsored events
- Committee chairs and committee sign-up forms
- Community involvement information
- A listing of upcoming chapter meetings or events

All requested updates should be sent directly to [jpoff@gscpa.org](mailto:jpoff@gscpa.org). Please ensure that all requests contain specific directions as to what information needs to be added or removed. **Requests will be completed and uploaded onto the website two-three days after they are received.** Chapter website administrators are encouraged to occasionally check their site to ensure up-to-date and correct information. Information will be removed or updated **ONLY** when requested by the chapter website administrator.

If you have any questions, please contact Jennifer Poff at 404-504-2939 or [jpoff@gscpa.org](mailto:jpoff@gscpa.org).

### **\*Chapter Email Notifications**

Jennifer Poff, GSCPA Member Services Coordinator, is the contact for all emails to be sent to individual chapters. Please submit emails to [jpoff@gscpa.org](mailto:jpoff@gscpa.org); **emails will be sent two -three days after they have been received.**

All requests should contain specific information regarding the content of the email, attachments to the email, and a contact person for responses to the email.

All chapter emails must include the unsubscribe line as follows: To unsubscribe to future email messages similar to this, please send an email to [memberservices@gscpa.org](mailto:memberservices@gscpa.org) with “Unsubscribe from chapter emails” in the subject line.

If you have any questions, please contact Jennifer Poff at 404-504-2939 or [jpoff@gscpa.org](mailto:jpoff@gscpa.org).

**\*If the website or email contact person will be out of the office for an extended period of time, you will be notified of the procedure in order to have your updates made or emails sent in a timely fashion.**

# CPE OPTIONS AVAILABLE TO CHAPTERS

The GSCPA CPE Committee is charged with the responsibility to present educational programs which conform to the rules of the State Board of Accountancy. It is especially important that all administrative procedures are followed and that proper documentation is given to each participant of any CPE program. The chapter hours are entered in the Society's database and appear on each attendee's CPE Hours Report. As chapters are an organizational entity within the GSCPA, their CPE programs fall within the responsibility of the CPE Committee for proper documentation. The CPE Committee reviewed the programs currently being offered by chapters and found no issues with the quality of the programs. However, there are several documentation items which the State Board requires that are not being consistently met by all chapters. **Beginning in May, 2003 the CPE Committee requires that any chapter CPE event of four or more CPE hours be submitted *in advance* to the CPE department for approval.**

*Before any promotional information is distributed about an upcoming chapter CPE event, the appropriate person in the chapter will send to the CPE department the following:*

1. Title of presentation
2. Speaker(s) name, firm name and contact information
3. Speaker(s) biographical sketch
4. Date and location of the program
5. Start and end time of the program
6. Number of CPE hours and A&A hours (if applicable)
7. A short description of the topic (as the program will be advertised to attendees)

*The CPE department has created a form which will help in the submission of the above. It is titled "Chapter CPE Review Form" and is included on page 33.*

Attendees at the chapter CPE program must be given the following:

1. A copy of the program materials prepared by the speaker
2. Biographical sketch of each speaker
3. Evaluation Form
4. CPE Verification of attendance form

*The CPE department has created a form entitled "Chapter Presentation Evaluation Form" which can either be used as is, or can be modified to solicit additional feedback from attendees. It is included in these materials. The CPE department will be happy to help if a chapter needs assistance with the design of the CPE Verification of attendance form.*

After the CPE program the following items must be forwarded to Alicia Atwater in the Society office.

1. A copy of the program materials
2. The biographical material
3. A list of participants claiming CPE credit *or* copy of the actual CPE credit form filled in by the attendees
4. Tabulation of the evaluation form results

If you have any questions about these procedures please contact Alicia Atwater at 404-504-2944 or 800-300-8889 ext 2944, e-mail: [aatwater@gscpa.org](mailto:aatwater@gscpa.org).

# CHAPTER CPE PRESENTATIONS

Chapters, as a branch of the state society, may provide programs, which qualify for continuing education credit. The CPE Committee encourages the participation of chapters in providing education to their members. The CPE Committee is charged by the State Board of Accountancy for compliance with rules governing which programs qualify for credit and how records must be maintained. Because the CPE Committee is responsible for all programs that qualify for CPE credit, all documentation of CPE programs must be forwarded to the CPE department.

As CPE demand increases, it is imperative that chapters coordinate their longer CPE programs with the CPE department. **Beginning in May, 2003, the CPE Committee requires that all chapter CPE events of 4 or more CPE hours be reviewed by the CPE staff before the program is advertised.** In addition to the items required for one and two hour CPE programs, longer Chapters programs must be evaluated by attendees and submitted as part of the documentation. Specific instructions for the review process and necessary documentation are found on a separate page in this section.

## *Programs that Qualify*

The overriding consideration in determining whether a specific program qualifies as acceptable continuing education is that it be a formal program of study which contributes directly to the professional competence of an individual licensed to practice by the State Board of Accountancy.

### General Requirements

1. An outline of the program is prepared in advance by the speaker and retained by the student.
2. The Program is conducted by a person whose formal training and experience qualify as a competent instructor. The way to substantiate the instructor's ability is to provide biographical information.
3. The program must be at least 50 minutes in length. Every 50 minutes of instructional time qualifies for one credit of CPE. If there is any fraction left over, you must round down. See attachment A page 32.
4. A record of registration and attendance is kept on file for presentation to the Board if necessary. This is provided by having the members sign in at the chapter presentation.
5. A certificate of attendance must be given to participants.
6. At the conclusion of the program, forward the following to Alicia Atwater at the Society office:
  - a. a copy of the outline
  - b. the biographical material
  - c. the list of participants
  - d. tabulated evaluation results (for programs of four or more CPE hours)

In order to fulfill the requirements mandated by the State Board of Accountancy, each attendee and program sponsor must have a copy of the outline and a certificate of attendance (credit form) for their CPE records. Each person as well as the program sponsor should maintain documentation of the CPE event for five years. By sending the CPE document to the CPE department, chapters do not need to maintain additional CPE attendance files. The GSCPA has chapter credit forms available for your meetings.

# Attachment A

## **How to calculate credit hours**

*In June of 2004, the Georgia Board of Accountancy amended their rules to allow half hours of credit. All credit will be rounded to the nearest half-hour of credit.*

All programs will be measured in terms of twenty-five minute segments or one-half contact hours. The shortest recognized program will consist of one contact hour. A contact hour is 50 minutes of continuous participation in a group program. For example, a group program lasting 75 minutes would count for one and one-half hours; however, one lasting between 50 and 75 minutes would count for only 1 hour.



## Chapter CPE Review Form for Programs of Four or More CPE Hours

This form is to be completed:

- For any chapter presentation of four or more hours.
- By the person responsible for the presentation.
- Returned to Alicia Atwater 30 days before the presentation.
- Before any promotional information is released.
- Speaker's Biography must be attached to this form.

Please complete or attach the following:

Chapter Name: \_\_\_\_\_

Name of Presentation: \_\_\_\_\_

Date of Presentation: \_\_\_\_\_

Location of Presentation:

Facility: \_\_\_\_\_ City: \_\_\_\_\_

Number of CPE Hours: \_\_\_\_\_ Number of A&A Hours: (if applicable) \_\_\_\_\_

Speaker's Name: \_\_\_\_\_

Company Name: \_\_\_\_\_

Speaker's Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Speaker's Telephone/Fax: \_\_\_\_\_

Speaker's Email Address: \_\_\_\_\_

Attach:

- Completed Form
- Description of Presentation (description as you would put on the promotional items)
- Speakers Biography

Mail or Fax to:

Alicia Atwater

Georgia Society of CPAs

3353 Peachtree Rd NE Ste 400

Atlanta, GA 30326-1414

Fax: 404-237-1291



## CHAPTER PRESENTATION EVALUATION FORM

Chapter Name: \_\_\_\_\_ Date: \_\_\_\_\_

Name of Presentation: \_\_\_\_\_

Speaker Name: \_\_\_\_\_

Speaker Address: \_\_\_\_\_

\_\_\_\_\_

Name of Participant (optional): \_\_\_\_\_

EXCELLENT = 5, VERY GOOD = 4, AVERAGE = 3, FAIR = 2, POOR = 1

Quality of materials: \_\_\_\_\_

Overall rating of course: \_\_\_\_\_

Speaker's knowledge of the subject matter: \_\_\_\_\_

Speaker's presentation skill: \_\_\_\_\_

What other type of courses would you like offered by the Chapter?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Additional Comments:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



## INFORMATION REQUIRED FOR RECORDING OF GSCPA CHAPTER HOURS

**This form must be submitted after the presentation of all CPE chapter events.**

1. Chapter Name: \_\_\_\_\_
2. Name of Presentation: \_\_\_\_\_
3. Date of Presentation: \_\_\_\_\_
4. Number of CPE Hours: \_\_\_\_\_
5. Number of A & A Hours: (if applicable) \_\_\_\_\_
6. Facility/Address: \_\_\_\_\_  
\_\_\_\_\_
7. Speakers Name: \_\_\_\_\_
8. Speakers Address: \_\_\_\_\_  
\_\_\_\_\_

**Attach Speakers Biography (unless already submitted), Outline of the Presentation and Verification of Attendance Forms (Chapter Hours can not be recorded without this information)**

**Please mail information as soon after the meeting as possible.**

**If you have any questions call: 404-504-2944 or email [aatwater@gscpa.org](mailto:aatwater@gscpa.org)**

Mail completed information to:  
Alicia Atwater  
Georgia Society of CPAs  
3353 Peachtree Rd NE Ste 400  
Atlanta GA 30326-1414



# EDUCATIONAL FOUNDATION OF THE GEORGIA SOCIETY OF CPAs

## MISSION STATEMENT AND OBJECTIVES

The mission of the Educational Foundation of the Georgia Society of Certified Public Accountants, Inc. (Foundation) is to encourage the best and the brightest individuals in Georgia to become Certified Public Accountants.

The objectives of the Foundation, to accomplish its mission as stated above, are as follows:

1. Inform individuals about the breadth of opportunities provided by the CPA profession.
2. Provide financial incentives to individuals seeking to enter the CPA profession.
3. Provide financial support to schools or educators at Georgia educational institutions that are educating individuals to enter the CPA profession.
4. Recognize excellence demonstrated by accounting students and educators in Georgia.
5. Recognize excellence in passing the CPA examination.
6. Raise funds to support programs.

The Foundation encourages all members of the Georgia Society of Certified Public Accountants (Society) to participate in its activities and to support its objectives throughout their careers and beyond.

# CHAPTER FUNDED SCHOLARSHIPS & PROGRAMS

## Matching Funds Program:

The Scholarship and Support Committee of the Educational Foundation offers chapters the opportunity to award their own scholarships through the Matching Funds Program. Chapters can submit funds, up to a pre-determined amount, that will be matched by The Educational Foundation. The combined total amount is then returned to the chapter to be used for scholarships to students and/or financial support to local college and university accounting programs

## Scholarship Timeline:

- Fall:** Chapter presidents will receive information regarding the Educational Foundation's scholarship as well as a Request for Matching Scholarship/Support Funding form. The chapter will also receive a copy of the Educational Foundation's scholarship application with blanks allowing for personalization of contact information and deadlines. The chapter is asked to fill in this section of the application prior to distributing scholarship applications. The chapter can use the same requirements as outlined by the Educational Foundation or they may determine their own requirements. Chapters will need to begin contacting institutions in their area.
- Winter:** A check will be mailed to the chapters for the Scholarship and Support Matching Funds Program.
- Spring:** Chapters are required to distribute their funding to students or universities and report back to the Society identifying the recipients of their respective scholarship money

## Resources Available to the Chapters:

Chapters are asked to localize their scholarship recruitment efforts. Some suggestions offered to the chapters as to recruitment are as follows:

- Distribute scholarship information to local colleges and universities
- Issue scholarship applications to chapter's student members
- Contact local colleges and universities regarding funding for their respective accounting departments

Information regarding local colleges and universities as well as student members in your area can be obtained from Shelly Grunbaum at [sgrunbaum@gscpa.org](mailto:sgrunbaum@gscpa.org) or 404-504-2956.

The following are requirements used by the Educational Foundation in regards to scholarship eligibility. Chapters may want to use these requirements as guidelines in selecting scholarship participants.

- a. Resident of the state of Georgia;
- b. Enrolled during the period the scholarship funds are to be used in an accounting program at an accredited senior college or university;
- c. Enrolled in a minimum of six semester hours (ten quarter hours) beyond the sophomore level during the period scholarship funds are to be used; and
- d. Maintain an overall grade point average of 3.0 (on a 4.0 scale) or above or an accounting grade point average of 3.0 (on a 4.0 scale) or above.

Chapter should follow the same criteria for awarding scholarships as listed below.

- A. The scholarships awarded may be used by the student for tuition, books, room and board, supplies, and other expenses associated with the cost of education.

- B. Awards for support to educational institutions may be made for hardware and software additions or other needs that are not being funded through the college budget, in accordance with the Foundation's mission. All matching grants must be for accounting department support and scholarships at degree-granting institutions accredited by the Southern Association of Colleges and Universities. The Foundation will not match funds for support of technical schools.

The Educational Foundation will distribute their standard scholarship applications to the chapters with blank areas allowing for personalization. (Form is included) Please be sure to change the contact information and chosen deadlines for your individual chapter. Any scholarship applications received by the Society office will be included in the Educational Foundation's direct scholarship program.

The sponsoring chapter is expected to be actively involved in the award process. Your chapter may want to appoint one or two chapter members to serve as chapter scholarship liaisons to organize the chapter's scholarship efforts. Suggested activities for the chapter officers and scholarship liaisons are:

1. Overseeing the recipient selection.
2. Presenting the award either at a chapter meeting or joint chapter-college function.
3. Publicizing presentation of the award in local new media.
4. Furnishing the Society with a press release and black and white glossy photograph for inclusion in news media sponsored by the Society, such as *Current Accounts* or the Society's web site.

The recent audit prepared for the Educational Foundation resulted in a Management Letter from the auditors based on insufficient follow-up documentation from chapters regarding disbursement of funds for the Matching Scholarship Program. The auditor recommended that chapters identify students and institutions that receive funds. Once you have selected the recipients of the scholarship(s) and support, it is imperative that you forward their name(s), address(es), amount given, and when the scholarships were presented to the Educational Foundation staff liaison by May 15.

**Chapter**  
**of the Georgia Society of Certified Public Accountants**

**Scholarship Application Form**

**Qualifications**

- Demonstrated commitment to pursuing a career in accounting;
- Applicant must be a rising junior or senior undergraduate accounting major or a graduate student enrolled in a master's level accounting or business administration program at a public or private college or university accredited by the Southern Association of Colleges & Schools;
- Resident of the state of Georgia;
- Enrolled in a minimum of six semester hours (ten quarter hours) beyond the sophomore level during the period scholarship funds are to be used;
- Maintain an overall grade point average (GPA) of 3.0 or higher (on a 4.0 scale) **OR** an accounting grade point average of 3.0 or higher (on a 4.0 scale) or above;
- Demonstrate financial need (Required for Advantage Payroll Scholarship and for others with financial need - To establish financial need, applicants must complete the "Free Application for Federal Student Aid" available in the school's financial aid office.)

**Instructions**

- Complete this application form in its entirety. Note that you will need the assistance of an accounting administrator and may need a financial aid officer from your school to assist you in completing the application.
- Attach the following items to your application:
  1. A sealed transcript obtained directly from your school's Registrar's Office;
  2. Your resume;
  3. An essay on your personal career goals and how this scholarship will help you attain these goals, in 250 words or less.
- Mail your completed application and all attachments to: **Scholarships,** \_\_\_\_\_
- **Application Deadline: April 15, 200\_\_.** Applications must be received complete with all attachments to be considered. The recipients will be named in May and will receive a check, payable to his or her school. Please contact Shelly Grunbaum with the Georgia Society of CPAs at 800-330-8889, ext. 2956 if you have any questions.

Name: \_\_\_\_\_

SS#: \_\_\_\_\_

Phone No.: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

**PERMANENT ADDRESS**

Street \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_ Zip \_\_\_\_\_

Phone Number \_\_\_\_\_

Email \_\_\_\_\_

**CAMPUS ADDRESS**

Street \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_ Zip \_\_\_\_\_

Phone Number \_\_\_\_\_

Scholarship Application for \_\_\_\_\_  
Last Name First Name

School Attending Now: \_\_\_\_\_

Expected Graduation Date: \_\_\_\_\_ Expected Degree: \_\_\_\_\_

GPA Accounting: \_\_\_\_\_ GPA Overall: \_\_\_\_\_ (must reconcile with transcripts from all institutions attended)  
(For GSCPA Office Use Only: GPA Verified By \_\_\_\_\_)

School where scholarship will be used (if different from above): \_\_\_\_\_

I attest to the accuracy and completeness of the information contained in this application and I authorize the student financial aid officer to provide the information requested.

Applicant Signature \_\_\_\_\_ Date \_\_\_\_\_

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**To Be Completed by the Accounting School**

Accounting Major: \_\_\_\_\_ Yes \_\_\_\_\_ No  
Classification: \_\_\_\_\_ Rising Junior \_\_\_\_\_ Rising Senior \_\_\_\_\_ Masters  
(Fifth Year)  
Enrollment Status: \_\_\_\_\_ Full-time \_\_\_\_\_ Part-time

\_\_\_\_\_  
Signature of Faculty Advisor or Department Head Date

\_\_\_\_\_  
Institution

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*Required for Advantage Payroll Scholarship and for others with financial need.*

**To Be Completed by the Student Financial Aid Officer**

Establish Financial Need: \_\_\_\_\_

**Aid Student Has Been Awarded**

Scholarships: \_\_\_\_\_

Grants: \_\_\_\_\_

Loans: \_\_\_\_\_

WorkStudy: \_\_\_\_\_

Other: \_\_\_\_\_

\_\_\_\_\_  
Signature of Financial Aid Officer Telephone Number Date

**To Be Completed by the Student**

*List any additional scholarships or awards you have applied for or received this year. Indicate if you have received notification regarding these.*

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# NOTES