

# Increased Advocacy & Awareness

## Extend the scope of advocacy-related initiatives beyond regulation/legislation

- Workload compression
- Firm culture
- Bridging generational gaps
- Succession planning
- Pipeline issues (5<sup>th</sup> year solution, on-campus presence, etc.)
- Diversity
- Soft issues that are more relevant to younger CPAs to get them involved earlier in their careers

## Enhance advocacy efforts

- Engage more members as opposed to NCACPA being the ones involved in advocacy
- Become more involved on a national level in order to strength relationships with national and larger regional firms
- Seek to have North Carolina representation on AICPA's boards, task forces, etc.
- Increase Advocacy & Representation Committee's efforts
- Work more with legislators who don't have financial expertise to expand our influence

## Increase the awareness of NCACPA's actions

- Create a list of the legislative bills and professional issues that NCACPA is monitoring.
- Create awareness of the advocacy being done by the Association's committees
- Incorporate advocacy into NCACPA's CPE initiatives
- Educate non-members on our actions and use as a recruitment tool

## Increase the financial support of the PAC, as money is needed to effect change

- Ensure we have a focus on multi-partner firms for donations
- When NCACPA incurs an expense in this area (e.g. amicus brief), let the membership know, as each member benefits from these efforts
- Increase member awareness of PAC by telling the story (Who is involved with the PAC? Who are we supporting? Why?)



# Governance & Operational Effectiveness

## Communication

- Stay on top of new and modern communication methods
- Learn how members and perspective members want to be communicated with
- Remove barriers to communication
- Consider an app for Connect
- Share lessons learned with fellow members so they don't repeat the same thing (maybe through Connect)
- Be transparent of any organizational changes/change management

## Data/BI

- How can we benchmark, leverage, and/or further mine data to share with our members
  - Aggregate responses to share with members
  - Ask members to share industry benchmarks
- Identify which metrics matter

## Association Governance

- Make a specific effort to identify where committees overlap on strategies/strategic initiatives
- Lack of awareness at committee level
  - Need focused, two-way communication efforts between the board and committees
  - Host a committee chair orientation similar to board orientation
  - Create a library for the notes from committee meetings
  - Set up a Connect community for committee chairs, board liaisons, etc.
- Mentor Young CPA Cabinet members and committee chairs for succession planning/leadership perspective
- Make sure everyone is clear on what they are supposed to do (i.e. expectations, roles and responsibilities)
- Create the expectation for leaders to not just to attend meetings, but to participate and share their voice, regardless of age, stage of career, etc.

## Financial Stability

- Explore other revenue streams beyond CPE
- Create and deliver a capsule of financial information
- Deliver certain financial information to committees (especially conference planning committees) with metrics like contribution margin, attendance, condensed P&L, etc

# Enhanced Member Engagement

## Engagement

- Offer opportunities (of varying time commitments) to get involved; seems to be directly correlated with membership experience
- Have board members call a firm partner and talk to them
- Offer firm membership/group invoicing/discounting
- Members expect access to all services (for free) with the payment of dues
- Address fears of posting on Connect due to the access by their competitors
- Partner with the Bar Association, Association of Corporate Growth, etc.
- Breakdown stereotypes of CPAs and help students understand what it is (this should help attract diverse CPAs)
- Membership diversification (e.g. military population, foreigners)

## Recruitment

- Reach multiple people within firms who may not know about NCACPA
  - Consider firm ambassadors or reach out to the existing contacts and provide them with resources to share information within their firm
- Phone calls to non-members from board members and committee members
- Invite a non-member to a CPE at the member price
- Charge non-members more for CPE so they see more of a value
- Engage past members with discounts or new benefits
- Offer membership discount for nonmembers
- Leverage the networks we have at the university level
- Attract non-CPAs/CGMAs as members

## Retention

- Address the loss of members around the 3 year mark due to career change
- Offer more resources to industry
  - We need to be seen as a highly valued CPE provider, but we should really be focusing on how to engage and provide resources for these types of members
  - What are competing organizations offering?

# Highly Valued Professional Development

## Purpose

- NCACPA needs to figure out who it wants to serve for CPE—define who we want our customers to be.
- Focus on what sets NCACPA apart /competitive advantage
- Market Analysis needs to include focus on non-members, B&I, young CPAs, larger firms (Ethics, soft skills, networking)
- Should programs focus on profitability or be offered as a member service?
- Identify and target the CPE needs of members
- Identify needs/pain points through committees and develop training to specific to them
- How do we predict what the needs will be in the next few years?
- Need better data on firm size (and firm focus areas) to see who our customers really are

## Programming

- Length
  - Fewer 8-hour seminars on one topic
  - Offer access to varying lengths of CPE (10 min, micro, podcasts)
  - Do better job of marketing availability of 30 minute CPE and expand library of these materials
- Timing
  - Need more CPE in June (according to Big 4 feedback )
- Topics
  - More specialized focus on B&I programming (too much of CPE is targeted to public CPAs)
  - Career development topics (soft skills, critical thinking)
- Speakers
  - Find new speakers by highlighting the "giving back" aspect
- Delivery
  - Timely, relevant, targeted topics delivered in short bursts (1-2hr)
  - NCACPA needs the same convenient format as its competitors
  - Increase online learning by focusing on live webinars
  - Delivery is very important—more and more demands on time, less time available for CPE during day/week
- Pricing
  - Offer conference packages--pay one price to attend multiple conferences (e.g., MIBIs)
  - If individuals go to a live event, offer an enriched experience (not 'just' learning, but networking/ connecting to people)



# Highly Valued Professional Development

## Experience

- CPE needs to be more interactive and would offer an opportunity for attendees to work on leadership skills. Include exercises and activities with thought-provoking examples.
- Want to have boutique CPE conferences at destination hotel. Nicer hotel in more central location with fun things to do after the CPE—dining, shopping, etc. (not necessarily golf and spa)
- Focus more on attracting younger CPAs
- If individuals go to a live event, offer an enriched experience (not 'just' learning, but networking/ connecting to people)

## Other Recommendations

- Ask members about their CPE needs (does their firm offer it already?). If you do not need CPE credit from NCACPA, opt them out of mailings as a cost savings.
- Is there a mechanism we can offer members where they can choose their communication method preferences?