



# TSCPA Annual Meeting of Members & Board of Directors Meeting

By RHONDA LEDBETTER, TSCPA Chapter Relations Specialist

**E**nergizing!" "Lots of valuable information." "Best yet!" This was the buzz at the 2018 Annual Meeting of Members held at La Cantera Resort in San Antonio. We set the tone with a more casual atmosphere, which generated a palpable feeling of excitement and connectivity that lifted individuals to a higher level of engagement with each other and with TSCPA. A new generation of the Society's volunteers was there in a two-day Leadership Development Institute. The Leadership Development Institute is a dynamic and engaging program focused on building confident, strong and effective leaders. The attendees' enthusiasm was contagious and their fresh perspectives sparked an energy surge among the other Annual Meeting participants.

Our menu of learning opportunities included a CPE seminar on the changing face of internal fraud, led by [Steve Dawson, CPA-South Plains](#). Four 15-minute "power sessions" guided members in exploring [TSCPA Exchange](#), tapping into social media, maximizing CPE resources and getting involved in TSCPA advocacy for the profession.

TSCPA Exchange is the virtual community where members share information and interact statewide. It's an important part of our toolkit connecting members regardless of geography or other challenges. There's a growing group of power users helping it flourish with hundreds of discussions so far.

Friday's general session opened with a conversation about the state of the Society, led by our Immediate Past Chairman Jim Oliver, CPA-San Antonio, CGMA, [Chairman Stephen Parker, CPA-Houston](#), and President and CEO Jodi Ann Ray, CAE. They opened by outlining the vision articulated in TSCPA's [strategic plan](#), which is to empower members to lead and succeed.

Addressing the Community and Connection pillar of success, Oliver commented, "Sometimes you have a great plan – then you get a curveball." Hurricane Harvey hit much of the Texas Gulf Coast three months into the fiscal year, affecting 9,000 members. Because we had a great plan in place, we were able to use the strategic plan's guiding principles to frame our organization's response to the disaster.

Commenting from the audience, Executive Board member Josh LeBlanc, CPA-Southeast Texas, told how his firm appreciated TSCPA's outreach to ask what help was needed. They gathered the [information provided by the Society](#) and shared it with their clients, making an impact beyond members to taxpayers and the community.

We are in a time of enormous growth in services to our [20 chapters](#), the places for members to connect locally. Leveraging the power of technology, TSCPA and chapter resources are being integrated to build websites and expand use of the joint database. A task force will recommend further actions enriching members' experiences at the state and local levels.



## CONTINUOUS LEARNING

A culture of continuous learning is a key element of the Professional Excellence pillar in TSCPA's strategic plan. We are on top of trends, such as personalized learning, microlearning, interactive video-based learning, performance support and gamification. A learning management system focused on competency, not just compliance, is being developed to bring more content online with flexible, engaging formats for live programming.

We are providing just-in-time resources for members, such as 38 tax reform courses that were quickly developed and made available in 15 chapters. We're constantly scanning the horizon for developing issues and can turn on a dime to put together additional learning options.

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Promoting the value of the profession to [future CPAs](#) – and those who educate them – is a key initiative. There are campus and faculty ambassadors, CPA2B boot camps, and TSCPA is nourishing relationships with accounting educators around the state. A hot spot for students of all ages is at [www.txcpa2b.com](http://www.txcpa2b.com).

### Accounting in Extraordinary Times

AICPA Vice Chairman [Bill Reeb, CPA-Austin, CGMA](#), opened with a fast-paced video touching on the fourth industrial revolution, reimagining the CPA profession, seismic shifts in society, regulatory

this arena and are concerned about protecting their personal liability for breaches. Sustainability reporting is an emerging field, as is integrated reporting.

A survey indicates that 65 percent of members plan to acquire new skills to enhance their career in the next 12 months. The key is to learn, unlearn and then relearn. Start with an agile mindset and focus on gaining competency-based knowledge.

### Leadership in the Digital Era

[Charlene Li, with Altimeter](#), talked about the changing face of leadership. She said that being a great leader

### Your “And”

[John Garrett, “The Recovering CPA,”](#) is on a mission to help CPAs prevent professionalism from suffocating their personality. Your “and” is the part of you outside of work – your hobbies, activities, the things that complete your whole self. They give you a sense of identity and make you memorable. The more “ands” you have, the less likely you’ll be prone to work-related anxiety or even depression.

Sometimes being the best professional isn’t about your technical skills. It’s good to a point, but the teeter-totter can tip and your work life get out of balance.



## External forces driving change include geopolitical instability, technology and cyber issues, workforce changes, regulatory complexity, and financial challenges worldwide.

complexity and new services. The message is that extraordinary times demand extraordinary leadership.

He said it’s difficult to initiate change when things are going well. By 2027, 75 percent of companies in the S&P 500 might no longer be there. Legacy enterprises that are doing well have initiated their own reinvention.

The accounting profession must prepare for the future. Accounting firms can do that by nurturing their planning and tax advisory services. Market demand is soaring, while client needs are changing.

Top skills financial executives look for in auditors include technology, communications and critical thinking. AICPA is working to transform the audit process, addressing the vital need for secured data and creating a pathway that recognizes the changing skills required. Beyond the financial audit lie assurance opportunities in new areas.

Cybersecurity risk management will be an explosively growing CPA service. Board members are more aware of their fiduciary duty in

is about relationships. Traditional hierarchies defined relationships, but now they arise from how work gets done.

In disruptive times, leaders create movements and inspire others to change. Any of us can become a leader of a movement; the key is to inspire followers. Leaders must be visible and easy to follow. They do this by extending themselves into the digital space and can use technology – like TSCPA Exchange or social media channels – to deepen business relationships.

Our important audience is online. We can’t afford to pass up a digital link with those important to our success: coworkers at all levels, colleagues in our field and others.

Li challenged the group to look at the beliefs that are keeping us from a digital presence and ask ourselves what new beliefs we must adopt to succeed, moving from our comfort zone to the place where the magic happens.

### TSCPA’S FIVE AREAS OF FOCUS

#### Successfully Navigate Sunset Review

Continuation of an independent board governing CPAs keeps the focus on the high standards necessary to protect the public.

#### Engage and Grow Our Community

We need to continuously evolve to welcome the next generation of CPAs. We’ll increase the strength in our numbers and boost members’ engagement.

#### Fuel Our Chapters

Our strong chapter network sets us apart and allows us to provide uniquely local connections. We are focused on providing resources to fuel our chapters to provide additional value to our members.

#### Reenergize Our Brand

We must have a clear message and presence as we demonstrate our value proposition to our current and future members.

#### Advance the Future of Learning

We’re all about helping CPAs be the best they can be and adapt to a changing environment. The learning landscape has changed dramatically and we will lead the way.

As you're letting people get to know what you bring in addition to professionalism, you can start to show a genuine interest in others. Start by conversing about work and then ease into asking about their hobbies. Do you know what 91 percent of your coworkers do for fun?

It's never too late to start. If you're in management:

- encourage others to open up by having photos in your workspace that show your hobby;
- when you're giving an employee a gift card, connect it to what they like – not just a generic one to a coffee chain, but maybe to a pet store, golf course, etc;
- have company events to create easy shared experiences where people can be comfortable opening up; and
- include a spotlight in the company newsletter or updates on employees' activities.

The tone at the top matters.

### CPE Foundation

The annual meeting of the CPE Foundation was held. Ryan Bartholomee, CPA-Permian Basin, CGMA, reported that online program revenue was up almost 50 percent and Summer Cluster attendance was very strong, while seminars and conferences have declined. At the CPE Strategic Planning meeting, it was recommended that the focus be on customer service, proximity and a holistic approach.

There will be continued investment in developing chapter relationships to support differentiation. The Foundation has partnered with several chapters to co-host programs and will look for more opportunities to do so.

A host of initiatives is planned, including:

- enhance the learning experience by incorporating more engagement into programs;
- continue to explore different pricing strategies to be more competitive in the marketplace;
- work with TSCPA's Business Development team to broaden our sponsorship reach; and
- develop and curate content for TSCPA online programming.

### PROFESSIONALISM And Your Personality

What if professionalism:  
Stifles your career?  
Turns you into a stock image on a  
business website?  
Makes you a stereotype?  
Don't let that happen to you.

### Accounting Education Foundation

The President of the [Accounting Education Foundation](#) Board of Trustees, Fred Timmons, CPA-San Antonio, CGMA, provided an update on the work of the Foundation. Some of the projects include:

- underwriting the Accounting Education Conference, an event where educators network and obtain relevant continuing professional education;
- making a contribution to the AICPA Minority Scholarships, which were given to seven students in Texas; and
- awarding \$2,500 scholarships to 50 qualified accounting students at Texas universities.



### CHAPTER CHALLENGE GOLF TOURNAMENT

*The golfers were:*

**Austin Chapter**  
Jesse Dominguez  
Jeremy Myers  
Joyce Smith  
Rick Smith  
Steve Wesling

**Central Texas Chapter**  
Alton and Twila Thiele

**East Texas Chapter**  
Ron Cook  
Randall Noe  
Keith Pfeffer  
Royce Read

**Houston Chapter**  
Billy Atkinson  
Mark Lee

**San Antonio Chapter**  
Chuck Clark  
Fred Timmons

**Southeast Texas Chapter**  
Josh LeBlanc

**TSCPA**  
John and Carolyn Sharbaugh

### 2018 LEADERSHIP DEVELOPMENT INSTITUTE PARTICIPANTS

Omolara Akinboye  
Michelle Barton  
Cristina Baumgardner  
Kelly Boswell  
Kathryn Devey  
Kay Dixon  
Kelly Fisher  
Kimberly Green  
Harrison Haake  
Andrew Hughes  
Rosalinda Marikar  
Nancy Meza  
Shawnee Miller  
Bryan Morgan  
Whitney Murley  
Lisa Pitts  
Pamela Rodriguez  
Lauren Seaux  
Stephanie Shaner  
Samuel Teichelman

To help fund its work, the Foundation held a silent auction during the Annual Meeting. The net raised was almost \$13,000, significantly more than the previous event. There are several ways to donate throughout the year, including purchases through Amazon Smile.

Charlotte Jungen, CPA-Houston, and Ed Polansky, CPA-San Antonio, were recognized as Kenneth Hurst Fellows for being outstanding supporters of the Foundation.

### Peer Assistance Foundation

Steve Mize, CPA-Fort Worth, CGMA, conducted the annual meeting of the Peer Assistance Foundation. He shared the purposes of the [Accountants Confidential Assistance Network \(ACAN\)](#), which are to:

- inform students and professionals about common performance-impairing problems, such as alcoholism and mental health issues;
- motivate affected persons to seek help;
- support affected persons in their recovery;
- encourage recovering accountants to share their experience.

As the Peer Assistance Foundation moves toward celebrating its 25th anniversary, it has a vision to be a champion of wellness resources for all current and future CPAs.

### CPA-PAC

Jesse Dominguez, CPA-Austin, chair of TSCPA's [CPA-PAC](#), showed where accountants ranked in contributions to the 2016 elections compared to other groups in Texas – and encouraged more members to participate. He also asked for members to serve as key persons to legislators.

### Business Matters

The 2017-2018 financial report was presented. Our 2018-2019 Treasurer Ben Simiskey, CPA-Houston, presented the new fiscal year budgets, which were approved.

During the annual meeting of the [Accountancy Museum of the Texas Society of CPAs](#), Inc., directors were elected.

### Plan Now for Future Gatherings

The Midyear Board of Directors and Members Meeting will be held in Austin Jan. 29-30. Watch the weekly *Viewpoint* e-newsletter for information.

New Orleans is the site for the 2019 Annual Meeting of Members and Board of Directors Meeting, June 21-22. We'll reach out to our Louisiana neighbors to make new connections and strengthen friendships. *Laissez bon temps rouler!*

Visit [www.tscpa.org](http://www.tscpa.org) for:  
[2018-2019 Executive Board](#)  
[2017-18 Award Recipients](#)  
[Awards Criteria](#)

Please also see the Chapters column in this issue for highlights from the Outstanding Chapter Awards. ❁

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