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In Atlanta, a scientific approach...

The CPA and Community Involvement
Question: How do you develop and implement a program to increase a firm's visibility and name recognition in a community if the program must...

...offer the opportunity for personal and professional growth to the individuals participating,

...offer the potential for short- and long-range benefits to the firm itself,

...be of substantial assistance and benefit to the community in which that firm is located?

For the Atlanta office of DH&S, the answer was a broad-scale community-involvement program enlisting the services of a paid outside consultant and a program that management both supported strongly and in which it participated fully.

Has the effort been successful? According to Atlanta partner in charge Curtis Cadenhead, partner Bill Gaik and consultant Barbara Asher, the people most directly involved from the start, it is still too early to say anything — except that there has been very real, very solid and very satisfying progress to date.

The community-involvement program in Atlanta had its genesis several years ago with concern on the part of the office practice-development committee that the firm did not have the visibility and degree of name recognition in the community that it should have, considering our strong position in Atlanta.

At about the time when the PD committee was evaluating possible steps to be taken to remedy the situation, partner Jim Copeland, who played a key role in initiating the community-involvement program, was serving with Barbara Asher on a committee of the United Way. He had first met Mrs. Asher while with Leadership Atlanta, a prestigious group made up of people from the professions, business and the civic and cultural segments of the Atlanta community.

Barbara seemed the ideal person to fill the pivotal role of outside consultant in the Atlanta office’s community-involvement effort. Widely traveled and with a working background in personnel and marketing with large retail stores in New York City and Atlanta, she has a long and solid record of volunteer work. Presently active with some thirty organizations in Atlanta, where she has lived for more than sixteen years, Barbara has been a member-at-large of the Atlanta City Council since January 1978. Barbara Asher, the DH&S people in Atlanta soon realized, is a woman who not only is deeply committed to volunteerism but also is "wired in" to the individuals and organizations that the Atlanta office wanted to reach.

"Let me make one thing clear," Curtis Cadenhead said. "We knew our people are active in the community; that wasn't the problem. The questions facing us were, first, how much benefit was being derived from this involvement — benefit to the individual, the firm and the community — and, second, whether all this time, effort and money could be employed more effectively."

Indeed, in the spring of 1978 when it was first decided to have Barbara Asher prepare a proposal for a community-involvement program, a preliminary survey of DH&S people by Bill Gaik found that they were members of more than one hundred different organizations. "Our early studies revealed that the heaviest involvement of our people was in professional, alumni and church-related activities," Bill said. "This wasn't really surprising, although it did point up the need for increased participation by our people in a broader range of community groups and activities. Our early surveys also tried to determine whether our people believed that their participation in outside groups aided their self-development and whether they thought these activities increased recognition of the DH&S name. Finally, we tried to get a clear fix on an individual's level of activity in an organization," Bill added.

It soon became apparent from the early studies by both Barbara and Bill that a methodical approach was necessary if the program was to achieve maximum effectiveness. Curtis agreed. In effect, the question was one of most efficient allocation of time, resources (man- and woman-power) and money, and this demanded a reasonable degree of supervision and direction by office management working with Barbara.

"I think the nature of volunteerism has changed and is changing dramatically," Barbara said, "especially within the business environment. Take the question of contributions, for example. You don't get the mileage out of money that you once did — people expect this from business today. You can get as much or more recognition by supplying talent, people with ability, because this often is needed much more than money.

"You also find that businesses now tend more and more to view the community-involvement activities of their people as their own. That is, the current corporate view is that you cannot dissociate a person's employment relationships and his community service activities. An individual's performance invariably reflects on his or her firm or corporation. And that doesn't even take into account the free time people are often given by their employer for community activities, or the additional support in the form of money, supplies or use of facilities. In our increasingly competitive society," Barbara pointed out, "businesses are becoming more aware of the effect that the community activities of their people have on their image in that community, that an uncontrolled and undirected approach may not be to their advantage. As a result, you are seeing more and more businesses instituting structured and controlled community-involvement programs."
According to Bill, the early stages of the Atlanta project — surveys of partners, managers and seniors by Bill Gaik and Barbara Asher, and consultations between these individuals and Barbara — shifted the focus of the effort to the importance of individual self-development as the major objective of the program.

"I suppose it can sound somewhat self-serving for us to claim that our prime goal is maximum self-development of our people, but that’s what it is. And the fact of the matter is that not only does it meet all our objectives but it also makes good business sense," Bill insisted. "Concentrating on the individual ultimately works to the best advantage of the firm and the community — about as ideal a situation as one could want."

It was decided fairly early that efforts would be concentrated on partners, managers and seniors. More-junior staff personnel, it is believed, still need time to establish their professional credentials. They are, of course, discouraged either from joining outside organizations or from seeking advice from more-senior personnel in the office.

Barbara’s consultations with DH&S people were aimed at determining their current level of activity in community groups and their interests, as well as suggesting possible changes in their activities or directing them to other groups on the basis of these discussions. The conferences had other benefits, according to Barbara.

"I found in a very few cases," she said, "that there was concern about the program, because these people were going to school in the evening and felt they had little enough time to spend with their families. Or, in one or two cases, people believed that their workloads were too heavy to allow enough time for outside activities. In cases like these we usually simply suggested that the individual do no more than maintain membership in organizations of his or her choice. More-active participation can come later, when the time situation improves."

The main thrust of the program, however, was to place the maximum number of DH&S people in key roles in as broad a spectrum of important organizations as possible. "Numbers in themselves don’t really mean that much," Curtis pointed out. "We wanted DH&S representation in all organizations where it would be to the benefit of the individual, the organization and the firm. But we want to have as many people as we can in decision-making roles, high-profile leadership positions in these groups, because this is where they can do the most good all around.

"As Barbara indicated earlier, the field of volunteerism has changed — it’s more of a quid pro quo situation today. Outside organizations need and want professionals and business executives because of the talent and resources they can supply in addition to donations. They need us and we need them for the good they can do the community in which we live and work. And what’s good for the community is good for us all. That’s not misty-eyed idealism — it’s hard-headed realism and good business.

"The outside groups that depend on volunteers have come to realize that we are willing to commit these resources but that we expect a reasonable degree of recognition of our contributions — and here degree is the operative word. All it might take, for example, is an individual’s affiliation with Deloitte Haskins & Sells noted on a dinner program or in a press release."

"The fact of the matter is that many of these organizations just don’t know how to show their appreciation," Barbara added, "at least in the ways that will help the firm. They want to be told, to be shown. It is, in fact, in their own interest, because the use of firm and corporate identification when an individual’s name is used indicates the level and extent of support the organization is receiving from the business community. Most volunteer organizations today recognize that fact and are anxious to cooperate with the business community in this respect as much as possible. They’re very anxious to receive as many practical suggestions as possible on how these ties can be strengthened."

The office took three steps to ensure participation by DH&S people in the broadest possible range of community activities. The first was the consultation with Barbara and her recommendations based on a determination of the individual’s interests matched against Barbara’s knowledge of community groups. "Certain organizations have a higher prestige factor, a higher profile in the volunteer community than others," she said. "As a consequence, the better groups often have a more select membership, and so these are the groups we would recommend that DH&S people join. After all, if you’re going to invest the time and effort, you might as well go with the best."

The second step was all partners in the office conferring with Curtis and selecting two organizations in which they expect to reach leadership positions. Here, too, the objective was not only to avoid an overload of DH&S people in any one organization, but also to ensure that our people were represented in all important groups. Finally, managers and seniors were required to notify Henry Asher, personnel partner in Atlanta, as to the groups they wanted to join.

Other factors are considered. Spouses have not been made a formal part of the office community involvement program, but they do receive advice and assistance if it is requested. In addition, Barbara found that it was preferable in some cases to recommend neighborhood involvement. "A typical case," she said, "might be someone who just transferred to Atlanta. Joining neighborhood groups — a civic association or PTA, for example — is a good way to learn about your neighborhood and your neighbors, a good way to begin to feel at home — and it is the type of activity
Everyone involved in the program in Atlanta emphasizes how valuable working with volunteer organizations can be to the development of the individual. "It's a great training ground, a marvelous learning experience in what you could call a low-risk environment," Curtis pointed out. "The individual has a chance to test his or her ideas on management, on leadership, to learn how to work with people, and how not to work with people. It broadens that person's exposure to different types of people, to different situations and provides an opportunity to experiment, to test your wings in a situation where there will be minimal damage if a mistake is made. The lessons learned in this environment obviously can be applied in work with clients and others.

"I think there's another feature of the program that's not as obvious, perhaps, but equally important," Curtis added. "Our emphasis right from the beginning was on how the community-involvement program was designed to further..."
the development of the individual, and that's how the program is seen by our people. It says to them, in effect, 'We care about you as an individual, as a professional; we want you to grow as fast as you can and go as far as you can.' And this they recognize, too."

For Bill Gaik, another important advantage of the program has been the expansion it has permitted in the office's work with minorities. "Not surprisingly," he said, "we found that minority groups need capable volunteers, and they don't worry about the color, race, religion or sex of the volunteer. They're no different from other organizations — they have objectives and want the help of anyone who can lend assistance. In fact, because some 35 percent of our professional staff are women, DH&S in Atlanta has been one of the major sources of professional women for community activities."

Barbara Asher's original proposal called for a series of what were termed "outreach seminars," meetings designed to have DH&S people addressed by spokesmen for various community groups looking for volunteers. The meetings are designed to permit them to outline their activities, objectives, methods and needs. Several of these have been held and more, including a broader spectrum of organizations, will be held in the future. However, Bill did point out that the office has already begun receiving a larger number of direct requests for volunteers from the community. Indeed, this is one of the reasons the office has not made any major effort to publicize the community-involvement program in the local communications media.

"We're very pleased with the progress of our program," Curtis explained, "and we know where we want to go in the future. Frankly, we don't want to be swamped by appeals for money and help from those who might read about our program in the local press. We've got great people here, but there still are limits to the time we give to outside activities. Particularly at this stage of the program, we prefer to exert careful control over its direction and size."

If they had to do it over again, would Curtis and Bill go outside for a paid consultant to structure the program for them? Both agreed that they would — if that individual was a Barbara Asher. "You need someone who has the contacts and the knowledge of the volunteer groups and their activities," Bill said. "Barbara's political ties in this case proved a plus for us, but it was her strong background in volunteerism that attracted us. If you want to do it yourself you first have to select a person who can give the proper amount of time; there's just no way you can get a program like this off the ground unless that person can put in all the time it takes. And then you really have to know the community and the volunteers working there. I might also point out that there is a tremendous range of organizations, everything from the Chamber of Commerce, United Way and Boy Scouts, to art and music, religious and minority groups."

"I'm sure there are offices where the partner in charge and other partners are really in touch with community volunteer activities," Bill added. "In those places it might not be necessary to go outside for a consultant. In most other locations, it might be the preferable course of action."

"Another advantage of using someone like Barbara," Bill said, "is that she continues to monitor the volunteer community for us. Volunteer activities, like anything else, change with time and with the changing needs of the community. What might be a 'top-rank' group this year might not be that visible or prestigious a year or two down the road. Or the reverse could be true — a low-profile organization now could be very important in a year or two. Barbara keeps track of these and advises us on which we should be with, which might be better in the future."

According to Barbara, a woman with a strong record in volunteerism is the best candidate for the role of consultant. "You don't want a politician," she said, "because politicians rarely have the extensive background in volunteer work that you need and want. My political position, for example, grew out of my volunteer activities. I also say a woman because it's more common for a woman to have the time necessary to obtain the depth and extent of community-involvement experience you want in a consultant. We're simply talking the realities of life."

What lies down the road? "I think we have to sit back for a bit and take stock of where we are," Curtis said. "We do know that the program has been successful so far; at least it has met and perhaps exceeded our initial expectations. We want to set up systems for measuring our progress. As you might imagine, it isn't that easy to gauge the progress you've made in a program of this type in only a year or so.

"On the other hand, we have learned that you can do the most good for your people, for the community groups and for the firm by approaching the problem in a very scientific, objective manner. I think it's safe to say that this is the direction we're going to be taking in the near future — targeting the goals we want to achieve in terms of what people we want to place with which groups, because that will result in the maximum benefit for all."

"You have to see it as a long-term project," Curtis said, "but if your people understand what you are trying to do, that your interest lies in their growth as well as helping the firm and the community, then there are immediate benefits. People, time and money — these are our most valuable resources. I think the major advantage of the community-involvement program is that it permits us to use these resources most efficiently — to do the most good with what we have."