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3-12-1996

AICPA News & Views, March 12, 1996

American Institute of Certified Public Accountants (AICPA)

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IN THIS ISSUE...

- Rumor Busters
- New Supplemental Insurance
- The Paperless Office
- Message from the President
- A Word from the Communications Implementation Team

The Paperless Office: How Far Away Are We?

Imagine an uncluttered desk. Imagine a compact disc that houses information originally stored in two filing cabinets. Imagine all memos, all letters, all written news, all phone messages, circulating on computer networks. This environment is known as the paperless office. It exists in few places today, if indeed in any. But is it impossible to imagine ourselves working in an environment like this in the future? Not according to Louis Matherne, Director of the Institute's Information Technology Team.

"Ten years ago, the paperless office was a pipe dream, but today we are right on the edge of it," he says.

Matherne scans the newsletters he receives into his computer, and he throws the hard copies away. His team deals closely with three AICPA Committees, the Information Technology Executive Committee, the Information Technology Research Committee, and the Information Technology Practice Committee. All written communications between his team and these committees, with the rare exception of the transmittal of very long docu-

ments, are sent by electronic mail. When his team is looking for a document, using a word search function, it is only a few key-strokes away. Matherne feels that his job is made much easier by operating this way. "The computer allows you to organize things in a free form

way," he explains, "It improves your organization in that it requires less organization. It enhances retrievability."

Irene Taylor of the Micro-computer/LAN Support Team agrees, but she recognizes that there are some steps we must

continued on page two



Meetings & Travel Beats the Paper Chase with a New In-House Electronic Form

The Meetings & Travel Team is beginning an introductory program for an electronic form with approximately 125 members of Team AICPA who regularly book meetings at the Institute. They will soon send out an e-mail to those who have been selected to participate in the program, asking them to answer some questions about their proficiency with computers. They will then be grouped into two different levels of "comfort" with technology and given a two-hour training designed to make using the new meeting request form easy.

Doris LeMaire, who books the meetings in the New York office, gives the new system a thumbs-up. "It will make things easier for people because they won't have to pick up the phone or write on a piece of paper and mail it to me. It will all be taken care of electronically."

LeMaire explains that Team AICPA members won't have to worry about sending the form to anyone, that it will automatically arrive at the right person's desk if they follow the instructions. She says that after the training, all participants will walk away with two and a half pages of instructions to which they can refer if they have any questions. Anyone with questions regarding the pilot program should e-mail or call her at extension 6240. In the Washington office, the person to contact is Ela Work, who can also be reached by e-mail or at extension 4260.

Human Resources Posts No Paper on its cc:Mail Bulletin Board

The Human Resources Team has established a bulletin board on cc:mail for Team AICPA members who want to access benefits facts, job postings, training updates, and other kinds of information. It's easy to use, and people should check it periodically to see if there is anything new and useful to them.

Selmo Alamilla, the Human Resources Team's HRIS Coordinator, explains, "This is important because we will cut away from using paper. It's the future, and it's easy. All you have to do is point and click."

Instructions for using the Human Resources Bulletin Board:

- 1 Log on to cc:mail. In a Windows environment, one will see on the left side of the screen a series of icons. One of these will be marked "bulletin board."
- 2 Click twice on the "bulletin board" icon. A "Human Resources" bulletin board icon should appear.
- 3 Click twice on the "Human Resources" icon. A list of documents should appear, much like one's cc:mail in-box. Read as one would read letters in one's in-box. This information can be printed and/or forwarded.

IMPORTANT NOTE: *Please do not post anything on the Human Resources Bulletin Board. Bulletin Board messages can only be deleted by the Human Resources Team. People with questions should either call or e-mail a member of the Human Resources Team.*

News & views would like to hear from your team about its efforts to achieve a paperless work environment. Periodically, this publication will print updates on the Institute's work to implement electronic methods for in-house operations. Please e-mail Anne Rothkopf or call her at extension 3357 if you would like News & views to spotlight your team's innovations.

The Paperless Office, *continued*

take before entering a phase where the AICPA is paperless. "I think [the paperless office] is a great idea, but we are not there yet by any means. We don't have the mind-set yet."

Taylor, like Matherne, acknowledges all the benefits that a work environment without paper would confer on the Institute, including the easier access to information, the space saving, and the time and cost savings. However, she feels that the most significant gap between us and the paperless office is not so much technological as personal. She mentions how reflexive it is for so many of us, even those of us with access to state-of-the-art technology, to pick up a pencil and pad before logging on a computer.

"It's a question of retraining our work habits," she explains. "Training has to be involved in it to educate people."

Stan Zarowin of the *Journal of Accountancy* concurs that when it comes to breaking paper-related habits of note-taking, record-keeping, and message-forwarding, "It's going to be a very slow change." However, he adds, "But we need to change, because we're going to get swallowed up by paper."

Zarowin is a member of the Operation ACCESS SWAT Team, and one of the goals of their project of developing a new "one-stop shopping" information system for the Institute is to implement a document imaging system, which will allow letters and other paper documents to be scanned, indexed and stored electronically. This will allow Team AICPA to do its work more quickly. Operation ACCESS will give more details regarding their work in the next edition of *News & views*.

Two Day-to-Day Work Teams are taking initiatives to end the paper chase. The Meetings & Travel Team is starting a pilot program for an electronic form to request meeting space (see sidebar on cover page). And the Human Resources Team has put a bulletin board on the cc:mail system for Team AICPA members (see other sidebar). These are small steps, but they are important ones. Other teams may begin to rethink their operations based on the concept of the paperless office.

Matherne, meanwhile, looks ahead and offers the following advice to anyone who doesn't yet feel at ease using a keyboard instead of a pen and a disc instead of a cabinet: "[The computer] is just a tool like any other. The focus is not on the technology. It is about making your life easier and better, and that's what it's all about."

... And Now, a Word from the Communications Implementation Team

Team. Team AICPA.
Day-to-Day Work Team.
CROSS-FUNCTIONAL TEAM.
PIP Team. **Implementation Team.**
**Market Segment
Team.**

We've all heard these words countless times over the past several months and yet many of us are still trying to figure out what they mean. What is a team? Why do we need teams? Who belongs to a team? Why are we a team? What's so great about a team-based environment? Where is this team concept taking us? . . . Sound familiar? And just how many times do you hear the word "team" in an average day? (*It must be well over 100 times!*)

Webster's defines a team as "a group organized to work together." Here at the AICPA, a team is, "**a group of two or more people coming together to achieve a common goal.**" Understanding what a team-based environment means is a challenge, and defining the word "team" is just the tip of the team iceberg, so to speak, but taking that first step really wasn't so bad.

The Communications Team is here to work together to help each employee (*including ourselves*) understand what the Institute's new team-based environment means and how it is affecting us today and what it means for the future. This includes keeping you up to date on who's on what team, why the various teams were formed, what they are doing, and how their activities can help make our "Values & Visions Statement" a reality. We met for the first time at the end of January and were introduced to the dynamics of working as a team and learned some important skills to help us

achieve our goals. In the three meetings that followed, we devoted our time to developing a plan for addressing the questions and concerns that we all have (*and we know there are many!*) in a manner that is timely and, most importantly, meaningful and understandable to each and every member of Team AICPA.

By now, you're probably thinking, "Yeah, yeah, yeah, we already know one thing teams do is have weekly meetings. But what have any of them done for me lately?" Well, as part of our effort to communicate *facts* and dispel rumors, the Communications Team unanimously agreed to run a "Rumor Busters" column in *News & views* in the February 9th issue and our second column appears on page 4. "Rumor Busters" is just the beginning. From here on in, we'll be communicating different issues and information about Team AICPA on a regular basis.

We want you to know that the Communications Team is not only here to provide information—we're also here to listen. If you have any questions, comments, or concerns, PLEASE call us, send a note, send an e-mail, stop in. . . . However you prefer, please get in touch and let us know how we can help you understand our new team-based environment.

Stay tuned! We'll be back with more in the next *News & views!*

Rumor Busters

from the Communications
Implementation Team

RUMOR #1: *Is it true that the AICPA is going to cut 15% of its staff in the near future?*

Absolutely not. In September last year, an article in the *Wall Street Journal* mentioned that the Institute had a plan to cut 15% of its workforce as part of its reorganization plan. At that time, Barry Melancon told the staff that the AICPA would move to a team-based environment, and that would mean the Institute would gradually transform itself to make better use of its resources to serve its members. Although the future never provides absolute guarantees to any organization, including the AICPA, no layoffs are currently planned.

As the Continuous Process Improvement Team reexamines how the Institute allocates its time and energy in the service of our members, some of us may be asked to perform different work, and all of us will be asked to change our approach to our work, to take on new challenges, and to receive training that will expand our skills. Attrition combined with the Continuous Process Improvement efforts will probably create workforce changes, but those changes will be managed with our Values & Visions Statement in mind.

Team AICPA should know that over the past year, normal staff turnover created over 65 position openings. The Institute is philosophically committed to making sure that any necessary workforce reductions will occur through the non-filling of those positions.



RUMOR #2: *Some people say that if you're not on a team, your performance evaluation won't be as good as someone's who is on a team. Is that true?*

No. First of all, we are *all* on teams. Each person who works at the Institute is on a day-to-day work team. In the past, it was referred to as a cost center. While it may not be obvious to many people yet, the Institute is undergoing a massive change in work culture. Each person who works at the Institute is being asked to approach his or her work differently so that he or she is empowered to make appropriate decisions about how the work gets done. It is not just a new name for an old thing.

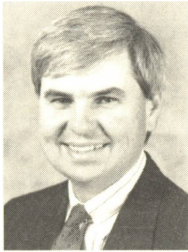
Furthermore, about one-quarter of the staff is a member of a cross-functional work team, such as the Market Segment Teams, Operation ACCESS, or the Implementation Teams. These teams will rotate to include other members, and other cross-functional problem-solving teams will be formed as needed to improve the quality of our service to members. Still, at any given moment, most members of Team AICPA belong to their day-to-day work team alone. No bias in evaluations will be held against anyone at the Institute who has not yet had the opportunity to belong to a cross-functional team. In the new team environment, performance evaluations will be based on:

- 1) Work contributions as an individual employee,
- 2) Work contributions as a member of a day-to-day work team, and
- 3) Where appropriate, work contributions as a member of a cross-functional team.

The Alignment Team is actively seeking a more team-like, equitable performance evaluation system for Team AICPA, one that fosters participation, diversity, differences of opinion, and a commitment to excellence.

Editor's Note: *The Communications Team wants to hear from people about rumors that they would like to see addressed by this feature of News & views. Anyone who has heard a rumor that ought to be confirmed or dispelled here should contact one of the members of the Communications Implementation Team: Roseann Beni, Leslie Billera, Carmella Chinnici, Doug Kadow, Krissy Korte, Joanne Lindstrom, Ron Piccin, Moe Powell, Anne Rothkopf, Kim Shapiro, Nelson Stephens, or Louise Williamson.*

Message from the President



I apologize for not having written to you for the past two months. I have been, as many of you have been, extremely busy. My work has taken me all over the country in an effort to reach out to our members, and I understand that many of you have also been quite busy receiving team training, joining Implementation and Market Segment Teams, and supporting the extra efforts of your Day-to-Day Work Teams as we move to a new way of thinking about the Institute and its mission.

While these things are important, I understand that even change for the better is difficult. Change means having to learn new skills. It means taking risks in order to grow. If I can use my own schedule as a measure for the work of the Institute as a whole, I know we are all working as hard as we can. I realize that integrating Cross-Functional Work Teams into the way we get things done is a challenge for everyone, whether or not one belongs to one of them. The people on Cross-Functional Teams have added new tasks to their workloads. While they are in meetings or are focused on these new tasks, other members of their Day-to-Day Work Teams are taking on additional responsibilities as well.

Since none of this is easy, let me remind us why we are working so hard. Remember that in early October, the Institute was still a hierarchy based on a military model. In that model, the President of an organization is a “general,” one whom “good soldiers” obey unquestioningly. At that time, I told you that my vision for the Institute was a different one, one where all of us are empowered to use our experiences and our common sense to find better solutions to our problems together. By allowing every person in the Institute to have a hand in the decision-making process, I know that we will come to the best decisions possible, because the sum of our knowledge and experience is more reliable than the expertise of any single one of us alone.

Developing a team culture takes time, and confusion is an inherent part of the transition process between hierarchy and teamwork. It will take a while for each and every one of us to feel how different it is to be on a team from working in an old-style management organization. But those who have experienced the difference will tell you that teamwork is both exhilarating and rewarding. Teamwork makes all staff members understand that their opinions matter. It makes appropriate staff members feel liberated from the constraints of certain kinds of decision-making so that they can use their time to focus on “the big picture” and can set the course for the organization’s future.

In order for this to happen, we all need to rethink the way we operate. Managers need to allow the people they supervise make decisions collectively about the ways their work gets done. Once decisions are made by the people who perform the tasks, managers will be able to devote more time to thinking strategically, the very skill that makes them indispensable to the Institute. This process enriches the jobs of everyone who works for the AICPA, including my own. To our members, it guarantees the best service we can possibly give.

I continue to be impressed by the talent and dedication of the members of Team AICPA. I am confident that this transition period, which will continue for some time, will bring results that will make us proud. I appreciate how hard everyone is working, and I am humbled by your support. Please accept my thanks for your efforts.

Team AICPA Anniversaries

Congratulations to the following members of Team AICPA who recently celebrated various anniversaries with the Institute:

Hal Dietrich	
Purchasing	34th
Richard Rickert	
Technical Publications	26th
Yolanda DeJesus	
Examinations	15th
Gerry Yarnall	
Audit & Accounting Guides	15th
Betty Betances	
Professional Ethics	14th
Tracy Argenzio	
Facilities Management-NY	10th
Irene Kassimis	
Facilities Management-NJ	10th
JeanPierre Mascetti	
Information Systems	10th
Jeann Smolka	
Direct Sales	10th
Ed Lanigan	
Marketing Services	9th
Joyce Chaney	
Library Services	8th
William Free	
Marketing & Product Management	8th
Coleen Katz	
Journal of Accountancy	8th
Lee Knopf	
MPO	8th
Ramon Bonilla	
Distribution Services	7th
Rachel Lester	
Taxation	7th
Lazaro Millares	
Accounts Receivable	6th
Edwin Ortiz	
Printing Services	6th
Matilda Rubino	
Subscriptions Administration	6th
Ina Walker	
Examinations	6th
Wendy Jones	
Information Operations	5th
Diego Ledesma	
Printing Services	5th

New Supplemental Insurance Available to Team AICPA

In the last issue of *News & views*, an article appeared about the life insurance that every member of Team AICPA receives as part of his or her benefits package. Starting May 1, Team AICPA members who would like to purchase three kinds of additional insurance will be able to do so through payroll deductions. These kinds of insurance are:

- 1 A flexible life insurance plan, which allows a person to purchase up to one million dollars worth of term life insurance coverage, includes a cash accumulation fund, and can also work as "paid-up" life insurance coverage.
- 2 Term life insurance for one's spouse of up to one million dollars worth of coverage.
- 3 Long-term care coverage for both one's self and one's family, including coverage for one's parents or one's parents in-law of up to \$150 per day for up to ten years.

This supplemental insurance coverage is available at an additional cost to Team AICPA. All Team AICPA members already receive life insurance and long-term disability insurance, for which the Institute pays the entire premium.

Informational meetings regarding this new program will be held on Wednesday, March 27 at noon and at 1:00 pm at Harborside. To sign up for this meeting please e-mail or call Kim Hines at extension 3350. Look in the next issue of *News & views* for more information regarding this program and for meeting dates in the New York and Washington offices.

Where are the Answers to Guy Provenzano's Oscar Quiz?

The celebrities fidget in their velvet seats in the auditorium as the sequin-covered starlet at the microphone fingers the red wax seal on the white envelope that might conceal their names. All of a sudden, the microphone goes dead and the lights black out. What happened?

News & views would like to apologize for the technical difficulty. As even the most temperamental superstar can see, this issue of *N&v* is packed with information, and when it came time to choose whether space should be used for answers to a trivia quiz or for messages from an implementation team and the president, well. . . We realized that the champagne would stay cold if we put it back in the ice box, the dancers would have more time to rehearse the opening sequence, and the cue cards would stay in order if we just found a big enough rubber band to hold them together.

Look for the answers to Guy Provenzano's Oscar Quiz in the next edition of *News & views*.