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Horizon Perspectives

CPA/SEA Task Force
Introduction
Update for State Society
Coordinators & Execs
External Advisory Council
Introduction
State Society
Coordinators & Execs
Update

Videos, Videos, Videos!

We have two videos available to states regarding the project. You should have previously received a copy of the introduction to the project. That is suitable for general audiences and is about 10 minutes in length.

We are sending copies of a video introduction of the consultation team. This video runs about 10 minutes and is suitable for leadership audiences and CPAs interested in how the project is going to be managed. We recommend that you show this video to your Board of Directors and Executive Committee at their next meeting.

The consultation team introduction video contains footage of the principle consultant, Gideon Malherbe, of Virtual Consulting Inc. There are also interviews with the two of Yankelovich Partners employees assigned to the project who are working on the External Advisory Council interviews, focus groups, and external market research functions.

There are short segments from Jim Kurtz,

representing the CPA/SEA task force viewpoints on the project, and a clip of Eric Schindler, the volunteer chair of the External Advisory Council.

The video closes with a short clip of Barry Melancon encouraging States to participate in the project as it progresses.

If you have not received a copy of the introduction video by June 10, please contact Leigh Knopf, at 212-596-6132.

An additional copy of the project introduction video will be tagged to the end of the new consultation team introduction video. This new combined format may be useful for chapter meetings or other gatherings where the person introducing the video isn't familiar with the project.

If you have questions, please e-mail us at mail@cpavision.org



Password Protected Web Section Coming Soon!

By Friday, June 20, you should receive a password allowing you access to the password protected section of the vision project web site. (<http://www.cpavision.org>)

This will be the section where you can submit questions, update the master calendar and "whois" databases.

We will have a special forum for State Society Coordinators where we can post answers to the most common questions and

keep everyone up-to-date on changes to the project.

If you do not currently have e-mail (check the whois database on the web site), we highly recommend that you obtain one. We will do our best to keep you informed separately, but you will miss out on the forum sections and may not receive the most accurate and timely versions of information related to the project.

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Future Forums

We are in the process of allocating grassroots Future Forums by state. We are working on a basic formula of 2,500 members as a base for justifying a Forum. Every state will have at least one forum.

After taking into account that every state regardless of size will have at least one Forum, we will focus on determining how the additional forums will be allocated. We will be conducting "control forums" which will be segment and demographic specific forums. For example, sole practitioners, industry members, age group and gender specific forums, and a host of other factors to ensure that we capture the views of the entire profession.

You don't have to do anything right now!

The AICPA will be working on the recommendations for forum structure and we will consult with each state

as we factor in regional representation and other factors.

States will be asked to handle and pay for physical arrangements for the Forums. Forums will be held to 25 persons and will be conducted over a full day. We expect that members will receive CPE credit for participation in the Forums.

States will be asked to help select individuals to attend. States will also be asked to send initial letters of invitation (signed by the State Society President and Executive Director). Once we have acceptance from the attendee, the Vision Project will take over the communication with the attendee, which should eliminate more work for the State Society.

We expect to be able to give you more information including dates by July 15.

Ad Hoc Future Forums & Training Dates

In order to expand the audience of members who are exposed to the issues of the future, we are encouraging states to consider running additional forums in your states. These forums are being referred to as *Ad Hoc Future Forums*.

The project will provide training for a facilitator of your choice (training is tentatively scheduled for September 4-5). The states will be responsible for travel related expenses for that facilitator. The project will provide an original set of materials for the state forums (states would need to make copies for participants and provide physical facilities for additional forums).

The project will NOT be training facilitators in general

facilitation techniques, but rather on the specific techniques being utilized in the Forums to capture CPAs viewpoints and be able to standardize and summarize the results so that they can be incorporated into the results of the projects.

Why would states want to support additional forums? It will give you an opportunity to capture a broader perspective of your members views in a professional manner. The materials being developed for the Forums will give some assurance that the participants cover a broad view of the future. This will also give the Society an opportunity to position itself with members as being concerned and proactive about their future. Watch for more information on the web site about this option!

Project Resources for States — Ad Slicks and More

In the packet with the consultation team introduction video, you will receive ad slicks in various sizes that we are asking you to place in your publications to promote the web site.

We will be providing a series of newsletter articles over the next several months that provoke interest and discussion in the forces and trends of the future that will be impacting the profession. By July 1, we

will be able to give you a schedule of these articles and their subject.

We are also developing discussion guides and other materials as additional backup to the newsletter articles to provide multiple options for CPAs to discuss these horizon issues. More information will be sent in the July update.

Member Co-Facilitator Delegates

You will shortly be receiving a nomination form for the Member Co-Facilitator Delegate that will include specific recommendations regarding qualifications.

Briefly, the Member Co-Facilitator Delegate will be asked to attend the Future Forums in your states that are being professionally facilitated. Their duties will likely include introducing the professional facilitator, briefly introducing the concept of the project and the state society's position in support of the project. There may be other minor duties, but the most important is for the delegate to represent your state at the National Future Forum in Phoenix, scheduled for January 1998.

The two day National Future Forum will bring delegates from every states together to formulate the working hypothesis for the vision statement of direction.

Because the National Future Forum is going to play a major role in the formulation of the vision, it is important that the delegate pool be representative of the entire population of the profession. That means we will need representatives from all member segments and demographics. It is important that as you consider individuals for nomination, you keep this in mind.

We are also strongly recommending to states that they consider appointing the Member Co-Facilitator Delegate to either the chair position of the state's planning committee for 1998, or at least play a major role with that committee. This will ensure that the issues surfaced during the visioning phase will have a better chance of receiving action as it moves into the planning phase. More information will be coming with the nomination form which should arrive on or before July 1.

Web Site Basics

We have begun to flesh out the *cpavision.org* web site with more background information. Of particular interest to states will be the whois database, which will list state society coordinators, member co-facilitator delegates, consultation team members, and others associated with the project as it moves along.

The master calendar will begin to flesh out as we assign Future Forum dates and locations and states begin to add Ad Hoc Forums to the calendar. There will be forms to submit new information, make corrections and deletions to both of these sections. Details will be sent as these tools become available.

We also have a recommended bibliography companioned with an on-line bookstore option. This section is designed to give CPAs and state society personnel

access to additional resources on the future and the process of visioning and planning. If you have a favorite book or publication that you would like us to recommend, please e-mail us the name of the book or publication, the author, and if it is a magazine or periodical, either an address or phone number for subscription information.

We are also looking for future focused CPAs that would make good interviews for the Pathfinder Profile section. E-mail suggestions and a brief description of what is unique about this CPAs approach to the future.

If you have future focused items on your web site, please e-mail us the URL.

Council Communications

The vision project has a strong tie to the AICPA Council. The initial introduction was provided to Council at its May meeting in Washington, D. C.

Members of Council will be receiving the video introducing the consultation team, which also includes the tagged project introduction tape. We have encouraged Council members to share that video with other CPAs. You may receive questions from Council

members, but we are doing our best to keep them informed on a separate track. They are being given the opportunity to receive an e-mail update monthly on the progress of the project. At this point, that update is limited to Council members. However, you will be sent a copy electronically.

It is not necessary for you to sign-up to receive this e-mail update.



FOCUS ON THE HORIZON

CPA Vision Project
AICPA
1211 Avenue of the Americas
New York, NY 10036

**ATTN: CPA Vision Project State Society
Coordinator and Executive Director!**

Horizon Projects

Vision Project Time Table

The Vision Project is moving actively into the market research phase of the project. We had our first consultation team meeting the end of May .

Yankelovich Partners is proceeding with the External Advisory Council interviews, and scheduling the student and user focus groups. The internal AICPA project team will begin the internal market research in the next two weeks.

All of this information will be consolidated and begin to form the foundation for the background materials to be used in the Future and Ad Hoc Forums.

We expect to conduct the Ad Hoc Facilitator training and the professional facilitator training in early September so that Forums can get underway by the second week in September. All Forums will be concluded by December 15, 1997.

The National Future Forum will be conducted the second week in January 1998. The working hypothesis will be tested among the delegates, the External Advisory Council and other appropriate groups in late January and February.

The draft of the vision statement and report will be introduced during the regional Council meetings in March. The revised draft and report will be reviewed again by Council at the May meeting.

Immediately after the May Council meeting, the revised statement and draft report will be circulated to State Societies (summer 1998) for comment and endorsement.

The final report will be exposed during the October 1998 Council meeting for approval. After approval the final vision statement and report will be sent to the membership, and the alignment phase will begin.