



Ohio Chapter Meeting

October 22, 2021

Virtual Meeting

The following members attended via ZOOM:

Donna Baker	MMNT, LLC
Charles Caldwell, Jr., CPA	Silas Simmons, LLP
Ali Carbo	Copeland Buhl & Co PLLP
Maureen Compton	Oles + Associates
Tammy Daniel	Antares Group, Inc
Thomas Fadeley	Ciuni & Panichi, Inc.
Guy Gage, III, LPC	Partners Coach
Margaret Gothot, CPA	Tax & Wealth Management, Inc
Daniel Gray	Dean Dorton Allen Ford, PLLC
Lisa Green	Holtzman Partners
Lorin Hamilton	BNA CPAs & Advisors
Michelle Holmes, PAFM	Martinet Recchia, Inc
J.D. Hurley	McClintock & Associates
Patti Ianni, PAFM	HW&Co.
Rita Keller, PAFM	Keller Advisors, LLC
Phil Knufmann	Greenstein, Rogoff, Olsen & Co. LLP
Patty Perkins	Hantzmon Wiebel LLP
Jenny Plummer	Whitcomb & Hess, Inc
Kathy Pool, CPA	Rudler, PSC
Roberta Reidy	Avaition CPAs
Leisha Rospert	Payne, Nickles & Comoany
Michelle Rush	Firley Moran Freer & Eassa, CPA, P.C.
Mary Schiffer, CPA	Wilkin Guttenplan CPAs & Advisors
Jennifer Singleton	Antares Group, Inc
Tiffany Taft, PAFM	Baker Holtz, CPAs & Advisors
Danielle Thatcher	Cullari Carrico LLC
Angelica Vaquera, SHRM-SCP	PKF Texas
Carly Valentine	Nietzke & Faupel, PC
Stacy Vernier	Mahe Duessel
Jen Zarins	Tidwell Group
Kayleigh Delaet	CPAFMA
Fred Dillon	Retired

Chapter Event:

**An Enlightened Conversation with an Expert- Fred Dillon
Interviewed by Rita Keller, PAFM**

Business Meeting

Leisha Rospert, Ohio Chapter President opened the business meeting.

The minutes from the June meeting as posted were approved. If you have any changes, contact Patti Ianni, Chapter Secretary.

Leisha Rospert stated no new activity therefore no treasurer's report.

Michelle Holmes, Chapter Vice President reported there were four new members to the chapter.

Maureen	Compton	Oles + Associates	mcompton@oles-cpa.com
Valerie	Fogle	Shultz, Huber & Associates VonLehman & Company	valerie.fogle@sha-cpa.com
Patty	Kautz	Inc.	pkautz@vlcpa.com
Tyson	Stuckey	Shultz, Huber & Associates	tyson.stuckey@sha-cpa.com

A warm welcome was extended to all new members!

Leisha Rospert reported that we are still in need of a Program Chair. Leisha notified all attendees of the vacant position and invited all to reach out to her if they were interested in becoming Program Chair.

Leisha Rospert confirmed the dates for the 2022 meetings

February 18, 2022

May 20, 2022

July 15, 2022

September 16, 2022

Leisha Rospert- launched a survey monkey survey in the fall the results relayed that 77% will meet attend remote meeting, 8% said no they would not.

The survey question and answers received:

What topics would you most like to learn about or discuss at our meetings?

- Helpful software and integrations. Tips & tricks for Microsoft Teams and effective training ideas.
- Rapid changes to the work environment and strategies to help firms address them. Remote work,
- Flexibility, mental health and well-being of their teams, impact of technology, new pandemic related programs and how best to manage them, etc.
- HR ideas -attracting and retaining talent
- Policy and benefit updates as a result of pandemic.
- Impacts on metrics (I.E. were expectations lessened b/c of WFH, are you keeping metrics lower moving forward, have you removed hours expectations, etc.)
- CPE and training resources -does anyone have a "trainer" or dedicated resource?
- Licensing -is anyone using software or outsourcing the process?
- Data analytics -has anyone hired for a PM or other "non-traditional" CPA roles?
- Topics could include how to manage resources i.e. scheduling; how to on board team members; how to onboard clients. Also, like hearing about software applications: knowledge base software, practice management software, people development/training, prospects/new clients.
- Talent management.
- Remote work and firm culture.
- If wages have changed across the firm, from receptionist to management/partner, and if anyone is willing to share an updated wage range. Do firms have internal or external HR/onboarding/payroll, etc. Have any firms experienced situations where accountants, CPA's cannot work together, and if so, how that was resolved and is there policy outlining such matters.
- Leadership/Coaching-Action coach or other speakers on leadership/culture, etc.
- Current status of workplace re-entry. OSCPA can enhance our relationship with your firms and CPAFMA and increase experience and engagement with you.
- OSCPA can assist with speakers.
- Staffing, what kind of insurance benefits are firms offering and what is the level of cost coverage.

Leisha Rospert reminded all that the 2022 CPAFMA Practice Management Conference will be held solo for 2022 in Portland, Maine from June 21-24, 2022. Rita Keller commented she had attended a previous meeting in Portland, Maine and it was a great area to hold conference.

Meeting concluded.

Roundtable and discussion items following Fred Dillon and Rita Keller

- Thomson AdvanceFlow- for audits and reviews- Michelle Holmes would like to connect with someone who uses.
- Paid Parental Leave
- Outsourced Workers- So Africa, Philippines, Romania
- Referral bonuses for staffing
- Difficulties staffing
- Learning Management System for meeting employee objectives and training- Matrix software
- Paro.com- to obtain outsourced employees
- Hoteling software
- Office spaces changing-hybrid model-permanent?
- Vaccine mandates?