

## **Ohio Chapter, Association for Accounting Administration July 15, 2011 Meeting**

The July 2011 meeting of the Ohio Chapter, Association for Accounting Administration was held at the Kroc Community Center and the office of Whitcomb & Hess in Ashland, Ohio on July 15, 2011.

The following members were in attendance:

Kelly Bates	Schlabig & Associates, Ltd.	Akron, OH
Paul Fellingner	Shriver & Co.	Cincinnati, OH
Michelle Johnson	Martinet Recchia, Inc.	Willoughby, OH
Kim Miller	Hall, Kistler & Company, LLP	Canton, OH
Susan Moon	Hall, Kistler & Company, LLP	Canton, OH
Kim Tanner	Whitcomb & Hess	Ashland, OH
Sharon Trabbic	William Vaughan Company	Maumee, OH
Barb Walker	Barnes Dennig	Cincinnati, OH
Anna Sary	Zinner & Co. LLP	Cleveland, OH
Jeff Shumway	Battelle & Battelle LLP	Dayton, OH
Marla Martin	Weber O'Brien Ltd.	Sylvania, OH
Patti Ianni	Howard Wershbaile	Cleveland, OH
Lisa Dunn	BCG & Co.	Akron, OH

### **Presentation**

This meeting's presentation was "Raising the Bar on Audit Efficiency, Compliance & Accuracy Using Technology Tools" presented by David Bergstein, CPA, CITP & Beth Bruck of CCH.

### **Business Meeting**

Minutes of the previous meeting were approved, as was the Treasurer's report, although it was not discussed in detail since Tammy Boring was not present.

Other items:

- One correction to May minutes – the spelling of Anna Sary's last name.
- The Network Summit will be held on September 9, 2011 from 9:30-3:00. All IT/Network Administrators are encouraged to attend.
- Special thank you's to Kim Tanner & Barb Walker as they step down from their well-served positions.
- New officers were inducted:
  - Sharon Trabbic – President
  - Kelly Nizzer-Bates – Secretary
  - Secretary – Anna Sary
  - Treasurer – Tammy Boring
  - Speaker Coordinator – Sarah Galley
- National Conference feedback:

- The card that was given to everyone to identify a “take away” from each session was very helpful
- The motivational speakers that were brought in were entertaining and effective, but seen as an unnecessary cost, especially when many would have rather heard someone from the AICPA speak on some political industry issues instead
- The outing to Churchill Downs (despite the excitement that night) wasn’t necessary in terms of keeping us entertained and some would have appreciated more designated time to get together informally to talk and share with each other
- The HR Fly-In with Jennifer Wilson was extremely beneficial, but by Friday morning, those that attended this on Tuesday were burnt out overall
- Longer amounts of time between sessions would have been appreciated, especially since it was a larger venue and sometimes got confusing
- Bill Leech’s session was so helpful!
- The session breakouts by size was disappointing across the board, due to microphone issues, lack of organization, and a few people monopolizing in each group
- We will be expanding our marketing efforts by running an ad in the CPA Voice to promote Jeff Pawlow’s presentation, since he is a high-profile speaker. We will also utilize other social media platforms.
- Proposed and approved increasing the meeting fee from \$25 to \$35 for both members and non-members, effective for the September meeting. However, for higher-profile speakers, we may need to charge \$45 to cover their cost.

Kelly reviewed the speakers she has lined up for future meetings:

- September 16<sup>th</sup> – Jeff Pawlow, The Growth Partnership
- November 18<sup>th</sup> – Mary Werner, Werner Coaching & Consulting
- February 17<sup>th</sup> – To be determined

### **Next Meeting**

The next meeting will be held on Friday, September 16, 2011 at Franklin University in Dublin.

## **Roundtable Topics**

1. Citrix servers
2. Intranet
3. Performance evaluation/Incentive programs
4. 360 degree reviews
5. Independence checking
6. Document retention
7. Social media
8. PTO/Bereavement policies
9. Cell phones and security
10. Triple monitors and laptops
11. iPads
12. Personality exams