

Ohio Chapter, Association for Accounting Administration July 18, 2013 Meeting

The July 2013 meeting of the Ohio Chapter, Association for Accounting Administration was held at Ohio Society of CPA's in Dublin, Ohio on July 18, 2013.

The following were in attendance:

Matt Alosi	Zinner & Co., LLP	Cleveland, OH
Tammy Boring	Snyder & Company	Lancaster, OH
Fred Dillion	Dixon Hughes PLLC	Charleston, WV
James Fahey	Hill, Barth & King LLC	Boardman, OH
Sarah Galley	Polman & Talmage CPAs, Inc.	Dayton, OH
Teresa Gardner	Clark Schaefer Hackett	Cincinnati, OH
Michelle Johnson	Martinet Recchia Inc	Cleveland, OH
Cara Knechtly	Woomer Nistendirk & Associates	Charleston, WV
Dan Lewis	Lewis Professional Liability	Worthington, OH
Marla Martin	Weber O' Brien, Ltd.	Sylvania, OH
Susan Moon	Hall, Kistler & Company	Canton, OH
Kelly Nizzer- Bates	Schlabig & Associates, Ltd.	Akron, OH
Kyle Plummer	Norman Jones Enlow	Columbus, OH
Tami Reynolds	Whitcomb & Hess, Inc.	Ashland, OH
Leisha Rospert	Payne, Nickles & Co.	Norwalk, OH
Leigh-Ann Sparks	Battelle & Battelle	Dayton, OH
Kim Tanner	Whitcomb & Hess, Inc.	Ashland, OH
Mike Toncar	Corrigan Krause	Westlake, OH
Sharon Trabbic	William Vaughan Company	Maumee, OH
Samantha VanArnhem	Corrigan Krause	Westlake, OH
Barb Walker	Barnes, Denning & Co	Cincinnati, OH

Presentation

This meeting's presentation was "*Improving Firm Efficiency with Lean Six Sigma*" presented by Dustin Hostetler, Flowtivity.

Business Meeting

Minutes of the May 2013 meeting were approved, as was the Treasurer's report.

Sarah Galley, Program Chair, shared the upcoming meeting speakers/topics:

- Thursday, September 19, 2013 – “The Digital CPA Ecosystem” with Roman Kepczyk of Xcentric
- Thursday, November 21, 2013 – “Succession Planning and Partner Retirement” Gary Adamson of Adamson Advisory

Sharon Trabbic, Chapter President, reminded attendees of the Accredited Administrator in Accounting Practice Management (AAAPM) Program. Sharon encouraged those that have not applied to do so.

James Fahey gave an overview on The National Practice Management Conference that was held June 18-21, 2013 in Detroit, Michigan. James announced that the 2014 conference will be June 17-20, 2014 in San Diego, CA.

James congratulated Sharon Trabbic for becoming a member of the AAA National Board as the Director of Membership and Growth.

Sharon presented the following slate of officers for the upcoming year:

Kelly Nizzer Bates, President

Sarah Galley, Vice-President

Michelle Johnson, Secretary

Tammy Boring, Treasurer

Marla Martin, Program Chair

The slate of officers was approved.

Sharon announced that the 2014 meetings will be held on Friday's instead of Thursday.

Next Meeting

The next meeting will be held on Thursday, September 19, 2013 at the OSCPA Dublin offices.

Roundtable Topics

- Bonus policy
- Maternity Leave
- Realization Goals
- Audit Watch
- Lack of compliance
- Practice Management
- Dress Code
- Improved Communication
- Disaster Recovery
- New Membership Efforts
- Accounting CS
- Training Plans
- Lifetime Managers
- Destination CPE
- 7216
- Extension Processes
- Paper in paperless
- Office builds
- Project Tracking
- Website Vendors
- Scorecards
- Compensation Structure
- Marketing

- Seasonal Staff
- Wellness Plans