

# Business & Industry Strategic Planning Meeting

January 14, 2009

Columbia CPA Center

# Introductions



Committee Chair Jack Greenberg opened the meeting and welcomed everyone



# Meeting Outcomes

## OUTCOMES

- EVALUATE THE B&I SURVEY RESULTS
- MAP MACPA RESOURCES TO THE NEEDS EXPRESSED IN THE SURVEY
- DEVELOP A SHORT TERM STRATEGY TO HELP OUR B&I MEMBERS THRIVE IN THE RECESSION
- CREATE THE RIGHT COMMITTEE STRUCTURE TO SUPPORT THE STRATEGY

## TOP 7 ISSUES

- HEALTH CARE COSTS
- WORKFORCE DEVELOPMENT
- STANDARDS/REG. OVERLOAD
- EMPLOYEE BENEFIT ISSUES
- ACCESS TO CREDIT
- CAPITAL SPENDING CUTS
- LAYOFFS

The outcomes of the meeting were discussed - the purpose was to evaluate the B&I survey recently completed by 151 + B&I members. We started with the Top 7 Issues identified in the survey.



# Survey Reflections

REFLECTIONS  
ACCESS TO CREDIT  
PLANNING IN UNCERTAINTY  
SALES/REVENUE/MKT SHARE  
FINDING THE RIGHT CPA FIRM  
BENEFITS/HEALTH CARE  
\* GAAP/TAX - PART OF  
JOB - NEED TO KNOW HIGHLIGHTS  
EVEN AUDITORS DON'T KNOW  
BENCHMARKING - CONNECTION  
BUT, WHAT IS TOP ISSUE?



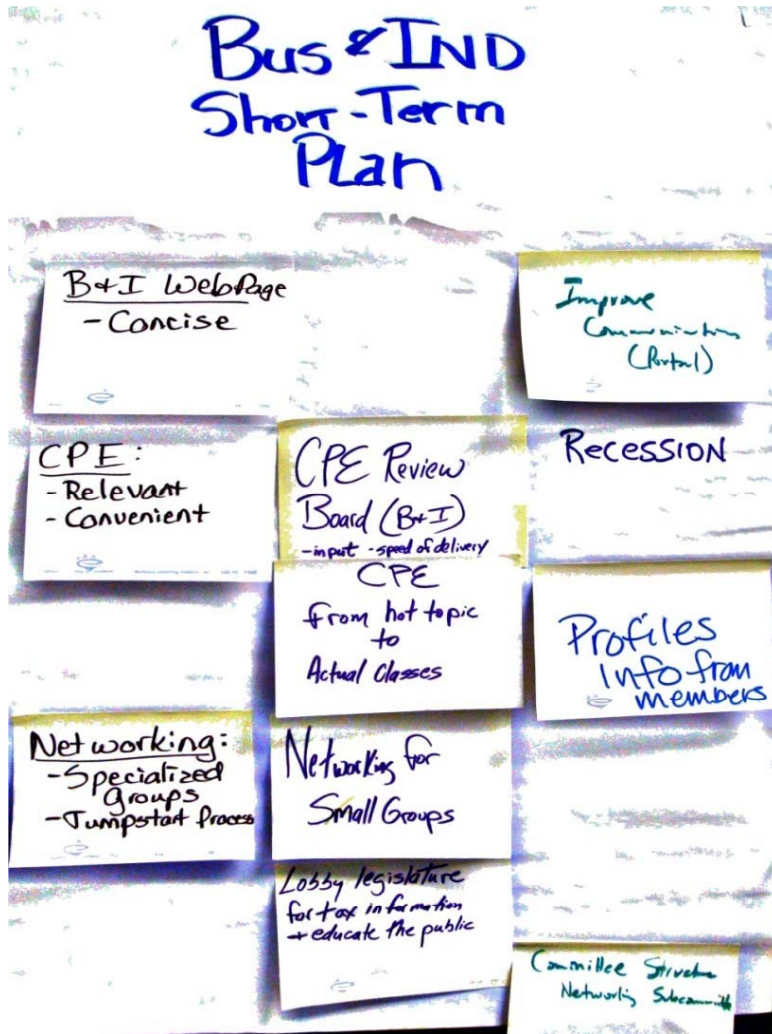
The group commented on the survey results with their reflections

# Categories of #3 Needs



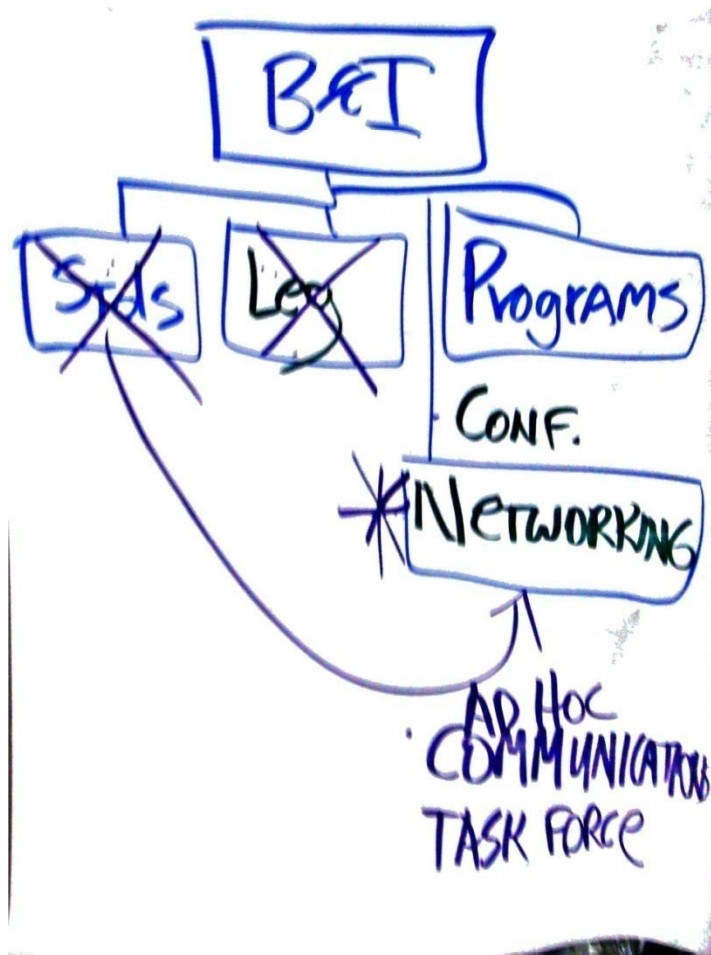
Question #3 had needs of B&I members – the group identified the primary themes/categories and then we discussed existing MACPA resources to look for “gaps” and potential new services

# B&I Short-Term Plan



1. Create B&I website resource page
2. CPE – Relevant to B&I members
3. Small Group Networking
4. Web-based community & profiles
5. Communicate Legislative/Regulatory Advocacy for B&I members

# B&I Committee Structure



The group discussed new committee structure and eliminated two committees , added a new networking subcommittee and is considering an ad hoc communication committee to review MACPA communications to B&I members.

# Meeting wrap-up

## Reflections

LOT OF Learning about  
Committee & topics Addressed  
Interesting to be part of  
Process going Forward  
Survey - great idea & Learning  
Very Productive MB  
LACK OF AWARENESS  
Energizing - Problem Solving  
TRYING TO BE RESPONSIVE  
SURPRISED HOW IT CAME TOGETHER  
SURVEY WAS ENLIGHTENING

SAME Problems - how do  
we TACK ABOUT IT  
Very USEFUL - DISCUSSION  
NETWORK / small group  
LIKED COLLABORATIVE  
EFFORT  
GOT US TALKING  
SMART, INTELLIGENT Group

