



330 North Brand Boulevard
Suite 710
Glendale CA 91203
(800) 922-5272
www.calcpa.org

June 24, 2011

Dear CalCPA Member,

I am pleased to announce the continuation of CalCPA Leadership Institute for 2011–12. This program is designed to teach potential member leaders the specific skills necessary to grow into future leadership positions at CalCPA and in the profession.

Strong leaders in strategic positions are key to CalCPA's continued success. CalCPA Leadership Institute is a five-day program designed to teach members skills that will make them better leaders and managers. Participants will grow as volunteer and business leaders as they focus on improving leadership behavior, as well as critical thinking and management skills.

The California CPA Education Foundation and CalCPA are underwriting the costs except for a small administrative fee that will be responsibility of the individual participant. Qualified candidates will be members who have the greatest potential for fulfilling future leadership roles at CalCPA. The nominations process requires a completed application to be returned by September 1, 2011.

Leadership Institute dates and locations for 2011-12 are:

October 20 and 21:	San Diego
November 29 and 30:	San Jose
January 18:	Sheraton Grand Sacramento

Please help us identify those members who will best lead our organization and profession in the years ahead.

Sincerely,

A handwritten signature in black ink, appearing to read "Eduardo L. Jordan".

Eduardo L. Jordan
CalCPA Chair

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CalCPA Leadership Institute

Learn the Skills That Will Make You a Better Leader & Manager

- The small class size (18–20 participants) promotes group discussion in an intimate and supportive environment.
- The course will consist of three sessions: a two-day session in Southern California; a two-day session in Northern California; and a one-day session in Sacramento.
- Learn the skills that will make you strong leaders in strategic positions.

Instructor Bill Reeb has been coaching individuals to become better managers and leaders for the past decade. Reeb has specifically tailored this program for CPAs to develop their leadership capabilities to more effectively support the CPA firms and businesses they serve.

www.calcpa.org/leadership

Day One: Program Situational Leadership—The Core

Leadership Behavior—Module 1

- Identify the fundamentals of leadership.
- Assess your leadership style.
- Determine which leadership style a leader is using for a particular task.

Leadership and Readiness—Module 2

- Identify indicators of people's ability and willingness.
- Determine whether a leader's style is appropriate for a situation.
- Receive feedback on the strengths and areas to develop your own leadership style.

Managing People—Module 3

- Identify the necessary steps in the developmental cycle.
- Determine the appropriate leader action for developing a follower

- Evaluate the appropriateness of a leader's action when handling a performance problem.

Day Two: "Twelve O'Clock High"

Participants will review and reinforce the skills and behaviors learned during Day One, and apply Situational Leadership, while watching the film "Twelve O'Clock High."

Day Three: The Importance of Strategy to Your Organization

- Structuring your organization for success.
- Understanding staffing differences: direct reporting versus pools.
- Effectively managing client relationships.

Day Four: Managing People

- Understanding emotional intelligence.
- Building teams and relationships.
- Managing, motivating and developing people.

Day Five: Firm Management Fundamentals

- Developing the necessary standard operating procedure to strengthen the foundation of your firm or business.
- How to implement accountability and pay for performance.
- Building your personal marketing plan.

Cost

The program is underwritten by CalCPA and the CalCPA Education Foundation. Participants are selected through an application process. Those selected will only be required to pay a small administrative fee of \$149 and are responsible for their travel and overnight accommodation costs.





LEADERSHIP INSTITUTE APPLICATION 2011-2012

PLEASE TYPE OR PRINT

CalCPA ID Number: _____ Chapter Affiliation: _____

Name: _____ E-mail: _____
(First) (MI) (Last)

Firm or Organization: _____

Telephone: _____ FAX: _____

Address: _____
(No. & Street) (City) (ZIP)

California Society of CPAs service (Chapter, state committee and/or Board of Directors/trustee position(s); give years of service, including the coming year):

Service to Other Professional/Community Organizations and Volunteer/Elected Public Service Experience. List most significant:

What do you believe are some of the key issues going on in our organization that you hope Leadership Institute will help you address? What type of support do you have from your firm/company to participate in Leadership Institute?

What do you hope to personally gain from attending Leadership Institute?

How much time are you willing to commit to your leadership development?
