



June 19, 2009

Dear CalCPA Member,

I am pleased to announce the continuation of CalCPA Leadership Institute for 2009–10. 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 ~~August 24~~ **September 10**.

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 that reads 'Andrea G. Cope'.

Andrea G. Cope  
CalCPA Chair

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## **CALCPA LEADERSHIP INSTITUTE 2009-2010 EXECUTIVE SUMMARY OF PROGRAM**

### **Program Principles**

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- The course will be best suited for an audience from about 10 -18 participants in order to promote group discussion in an intimate and supportive environment
- The course will consist of 3 sessions, with two sessions being 2 day except for the final session being one day (for a total of 5 days)
- The course is designed to teach members skills that will make them better leaders and managers.
- The course series will take place in the months of October, November and January.
- The course will have a nomination form process that will identify members with potential for future leadership positions. A review committee of the two top officers and another current leader will make the selections.

### **Instructor**

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#### **Bill Reeb, CPA**

Bill, in his work with CPA firms, CPA Associations and companies of all sizes, has been teaching leadership materials and coaching individuals to become better managers and leaders for the past decade. Bill has tailored his courses to train CPA professionals, CPA firms and the businesses they serve to help them better develop their leadership capability.

### **General Outline for the Program**

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#### ***Day One: Program Situational Leadership – The Core***

##### Leadership Behavior – Module 1

- Identify the fundamentals of leadership.
- Assess your current leadership style.
- Determine whether a leader's task behavior is high or low.
- Identify indicators for each of the four leadership styles.
- Determine which leadership style a leader is using for a particular task.

##### Leadership and Readiness – Module 2

- Identify indicators of ability and willingness.
- Determine the readiness level of a follower or group of followers for a specific task.
- Identify which leadership style to use with a follower.
- Determine whether a leader's style is appropriate for a situation.
- Receive feedback on the strengths and areas to develop your own leadership style.
- Experiment with the consequences of appropriate and inappropriate leadership styles.

##### Managing People – Module 3

- Identify the 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.
- Identify what a leader does appropriately or inappropriately when handling a performance problem.

### ***Day Two: Twelve O'Clock High***

Twelve O'Clock High is based on Twentieth Century-Fox's classic, award winning film Twelve O'Clock High®, starring Gregory Peck, and is designed to allow participants an opportunity to apply Situational Leadership® through a very powerful case study. This course has been revised and enhanced to enable the attendees to translate the behavioral sciences, principles and concepts into effective action.

This is a great way to review and reinforce the skills and behaviors the participants learned during Situational Leadership®. The film provides a significant opportunity to learn more about leadership, motivation, performance and readiness levels.

### ***Day Three: The Importance of Strategy to Your Organization***

- Strategic planning and goal setting
- Structuring your organization for success
- Profession trends and benchmarks
- Staffing: direct reporting versus pools
- Client management
- Developing an understanding at 30,000 feet

### ***Day Four: Managing People***

- Communications skills
- Emotional intelligence
- Organizational leadership (building teams and relationships)
- Managing, motivating and developing people
- Creating a desirable workplace environment and culture

### ***Day Five: Firm Management Fundamentals***

- Developing the necessary Standard Operating Procedure to strengthen the foundation of your firm
- How to implement accountability and pay for performance
- Developing your personal marketing plan

### **Proposed Dates**

The session locations will rotate between Northern and Southern CA based on the demographics of the participants. The dates are:

<b>October:</b>	<b>28 and 29</b>	<b>Doubletree San Jose</b>
<b>November:</b>	<b>18 and 19</b>	<b>Westin LAX</b>
<b>January:</b>	<b>20</b>	<b>Sheraton Sacramento</b>

### **Cost and Member Pricing**

The Education Foundation is underwriting a portion of the program, materials and instructor costs. Selected participants will only be required to pay a small **administrative fee of \$149**.

**APPLICATION MUST BE SUBMITTED PRIOR TO ~~AUGUST 21, 2009~~ SEPTEMBER 10, 2009.**



# LEADERSHIP INSTITUTE APPLICATION 2009-2010

*PLEASE TYPE OR PRINT*

CaICPA ID Number: \_\_\_\_\_ Chapter Affiliation: \_\_\_\_\_

Name: \_\_\_\_\_ Email: \_\_\_\_\_  
(First) (MI) (Last)

Firm or Organization: \_\_\_\_\_

Telephone #: (\_\_\_\_\_) \_\_\_\_\_ FAX #: (\_\_\_\_\_) \_\_\_\_\_

Mailing Address: \_\_\_\_\_  
(No. & Street) (City) (Zip Code)

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

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

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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?

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

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

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How much will your firm/company allow you to commit to your leadership development?

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How open are you to receiving feedback from the full circle of people with whom you work, including peers, managers, direct reports, internal and external clients or customers?

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If you receive constructive feedback, how willing are you to establish and commit time and effort to a development plan to further skill building?

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**Occupational Category (Please check):**

- Member in Public Practice:**
  - Individual Practitioner
  - Partner
  - Staff

<u>Firm Size</u>	
<input type="checkbox"/> Solo Practitioner	(1 CPA no employees)
<input type="checkbox"/> Sole Practitioner	(1 CPA with employees)
<input type="checkbox"/> Small/Local	(2-5 CPAs)
<input type="checkbox"/> Big/Local	(5+ CPAs, 1 office)
<input type="checkbox"/> Regional	(Multi office confined to Western US)
<input type="checkbox"/> National	(Multi office, offices on both coasts)
<input type="checkbox"/> Big 5	

- Members in Industry:**
  - Operations     CEO     CFO     Department Head     Controller
- Education**
- Government**
- Attorney**

**Optional Information:**

- Gender:**     Female     Male
- Ethnicity:**     African-American     Hispanic     Asian-American     Native-American  
 Caucasian     Other (Specify)

If selected I will make every attempt to attend all seminars and seek out assignments in order to enhance CalCPA activities and programs.

Date: \_\_\_\_\_ Submitted by: \_\_\_\_\_

**Complete and mail to:**

**Leadership Institute  
California Society of CPAs  
330 N. Brand Blvd., Suite 710  
Glendale, CA 91203-2308  
or FAX to: 818/246-4017**

**APPLICATION MUST BE SUBMITTED PRIOR TO ~~AUGUST 21, 2009~~  
SEPTEMBER 10, 2009.**