



2011-2012 Technology

**California Society CPAs  
2011-2012 State Technology Committee  
Technology Awards Program – Planning  
Conference Call for Planning – August 3, 2011**

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**Sub-COMMITTEE MEMBERS:**

Jim Sanders	<a href="mailto:jaslin@jaslin.com">jaslin@jaslin.com</a>	415-587-0171
Arlynn Peavey	<a href="mailto:a.peavey@comcast.net">a.peavey@comcast.net</a>	510-304-8627
Barry Hensiek	<a href="mailto:barry@hccpa.com">barry@hccpa.com</a>	626-792-9988
Woody Fox	<a href="mailto:wfox@foxandstephens.com">wfox@foxandstephens.com</a>	( <i>ex officio</i> )

**CONFERENCE CALL AGENDA:**

The CalCPA Technology Committee has adopted a recommendation to implement a two-part recognition program. The program is to be similar to national recognition programs, but enacted on a statewide level.

The purpose of this conference call is to set a timeline for action related to the implementation of this program for the 2011-2012 Society operations year, and to assign action items as appropriate.

**AGENDA:**

- 10:30 Good Morning
- 10:35 Overview of today's issues
- 10:40 Review of timeline for 2011-12
- 10:45 Assign action items:
  - Write letter to Chapter Presidents - JAS
  - Write notice for Chapter Bulletins - BH
  - Write notice for Society Publications - BH
  - Contact appropriate Society staff for recommendations – JASArlynn will proff & review documents
- 10:50 Presentation venue: **Chapter** vs. Annual Meeting
- 10:55 Any other issues; future meetings/calls
- 11:00 Adjourn

Work items will be complete by October meeting of the Technology Committee for review. The awards program will be evaluated for two years to determine if it will become a permanent program.

Jim  
James A. Sanders

## AWARDS PROGRAM GENERAL GUIDELINES

This program consists of two awards.

1. The California Society CPAs award for **Individual Contribution to the Advancement of Accounting Technology**;
2. The California Society CPAs award for **Firm Advancement of Accounting Technology**; this award may, at the Committee's discretion, be given to a CPA Firm, Society member's firm or a company integral to the Accounting profession.

These awards will be selected annually, and presented at the Society Annual Meeting. Recipients for the awards will be published in the Society's CPA Magazine, and posted on the Society web site. The award selection task force may choose to present multiple awards in each category each year or no awards in a year where no candidates are deemed worthy for the presentation.

If an appropriate corresponding award exists at the National (AICPA) level, recipients of the California awards will be automatically submitted for the corresponding award at the national level. CalCPA staff will forward the nominations, after determining if the local recipients are eligible for the national award.

Members of the Society Technology Committee should be charged with providing Chapter-by-Chapter, local promotion of the award program, as well as for the Society as a whole and appropriate local media.

## SELECTION CRITERIA

These awards are limited to firms and individuals within the jurisdiction of the California Society CPAs and the California CPA Education Foundation. Recipients should be a member of the Society, or be a firm or company that has employees who are members of the Society or Foundation, or provide significant technical support to the Society. The awards task force may consider activities at the local, state and national levels, but acknowledgment and presentation will be local.

To be considered for the awards, the individual or firm must have undertaken to positively influence or enhance the Accounting profession community in one or more of the following areas:

- ⑤ Enacted Technology that enhanced the accounting community as a whole, or promoted the public welfare
- ⑤ Enacted Technology Improvements that positively impacted the quality of life in their community
- ⑤ Enacted Technology that advanced the community through political or legislative involvement

- ⑤ Enacted Technology that provided significant philanthropic or charitable activities
- ⑤ Enacted Technology that provided a positive image of the accounting profession to the public
- ⑤ Enacted Technology that Advanced higher levels of professional ethics or professional conduct
- ⑤ Enacted Technology that Improved health and safety for the profession and the community
- ⑤ Enacted Technology that promoted international understanding or furthered foreign trade
- ⑤ Advanced Technology Education for the public or the accounting profession

Candidates for the awards may be located using the following methods:

- Notices in CPA Magazine
- Notices in Chapter Newsletters
- Letters from Chapter Technology Committee Chairs
- Letters from Chapter Presidents
- Recommendations from Society & Foundation staff members
- Recommendations from CalCPA Technology Committee Members
- Newspaper and media articles

## **ANNUAL TIMELINE FOR AWARDS PROCESS**

The following timeline describes a proposed timeline on an annual basis.

- MAY ⇒ Phone calls & Letters to individuals & firms receiving award  
 ⇒ Press releases sent to Society Communications Staff (pre-Annual Meeting)  
 ⇒ Local Press for awardees invited to Annual Meeting Gala to cover awards presentation
- JUN ⇒ Presentation of Awards at Annual Meeting  
 ⇒ Photographs taken at Annual Meeting for promotional use during year  
 ⇒ Article on recipients written for *CPA Magazine*  
 ⇒ Term of the current year Awards Task Force terminates
- JUL-AUG ⇒ In-coming Technology Committee Chair appoints new Awards Task Force
- SEP-OCT ⇒ Awards Task Force meets [in person or by phone] to review all materials and to set action agenda for year  
 ⇒ Revisions drafted for current year's awards program
- NOVEMBER ⇒ Awards program materials revised and printed
- DECEMBER ⇒ 1st request for award submissions placed in publications  
 ⇒ Flyers available at December monthly Chapter meetings

- JANUARY ⇒ Letters sent to Chapter Presidents requesting submissions  
⇒ Flyers available at January monthly meeting
- FEBRUARY ⇒ 2nd request for award submissions placed in publications  
⇒ Flyers available at February monthly meeting
- MARCH ⇒ Society & Foundation staff submit recommendations  
⇒ March 30th is deadline for submissions
- APRIL ⇒ Awards Task Force meets to select recipients for current year [at annual  
Tech Meeting?]  
⇒ Recipients of awards notified of their selection; requested to be at Annual  
Meeting for presentation
- MAY ⇒ Award plaques, statuettes and certificates prepared  
⇒ Attendance of recipients at Annual Meeting confirmed; Chapter  
presentations may be substituted