

EMPOWERING CPAs

New Education Foundation Chair Works Toward a Better Profession



Adam Blitz, CPA
CalCPA Education Foundation Chair

At the recent CalCPA Council meeting, Adam Blitz, CPA was installed as 2022-23 chair of the CalCPA Education Foundation. Blitz has been an active member of CalCPA for many years, as well as technology columnist for *California CPA*. He is the founder of Streamline CPAs in Fresno and a proud University of California, Santa Barbara graduate. We spoke with Blitz to learn what members can expect during his term.

Q: How is work as an accountant going during these tumultuous times?

A: Tumultuous times? I think what you mean is life! Life is difficult! But that difficulty creates new opportunities, new perspectives and new solutions. Does it require time and effort? Absolutely! My goal in my career is to make positive changes in the world that will impact myself, my family and my clients. It's a huge task, but one that I am passionate about ensuring happens!

Q: Why did you get involved in CalCPA Education Foundation leadership?

A: Working as a practicing CPA for the last 15-plus years, I'm passionate about this profession. I think we have a lot to offer our local communities, the country and the world. We can make an impact. But I felt that as the world changes, CPAs need to change the way we work and interact within the business communities to make the biggest impact. Joining the Education Foundation Board of Trustees has provided me the opportunity to work with the executive leadership team to advocate for more soft skill training for our really talented CPA users.

Q: What has changed at the CalCPA Education Foundation?

A: Executive leadership to start! It's so great to have Denise Froemming and Jennifer Weed lead the changes at CalCPA. Their directness at pointing to systemic issues that have arisen over several years at the Foundation is refreshing. With that being said, I'm really looking forward to seeing significant changes to the catalog, moving to shorter one- to four-hour classes vs. the traditional eight-hour course. I'm also looking forward to changes to some of the platforms that we use to host the CPE courses online. The opportunity to make participant engagement easier and more streamlined is another goal I have.

Q: What are your goals during your term?

A: The Foundation needs to make sure its finances are solid moving forward; it needs to see a movement to build back our revenues that have slid the last several years. I do think with the new leadership, the organization is poised to bring the CPE provided by the Foundation back as the main provider for many CalCPA members. The statistic that stands out to me is that only 39 percent of

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our members use CPE from the Foundation at this time! That number has to go up! I look forward to reporting what that number is for the 2022-23 year.

Q: What will this look like?

A: Well, what you will see is more direct marketing, concise classes that meet specific needs, and a better online and self-study user experience. And awesome, relationship-building conferences. I see CPE in two buckets: one where we get a quick fix of the information we need to help our clients and a second to build relationships with other CPEs to learn about industry trends in person. Those in-person events should be special and thrilling! CalCPA needs to make sure that our users get the opportunity to get the best of both worlds!

Q: What are some of the trends in the professional education world and how is CalCPA responding?

A: CPE has to be relevant, available and timely whenever and however the user wants it. That is a tough challenge, but CalCPA is working tirelessly with its technology and marketing teams to ensure our customers are being directed to the content that is relevant to

for businesses and individuals, but also the industry is required to help our clients and companies bridge the gap between what the financial statements say and how that can be interpreted into results. In the past, the accounting professional would be required to produce the information; the job now is to explain and educate colleagues and teams to take action on their meaning.

Q: What do you believe sets the Education Foundation apart?

A: The Education Foundation has the direct insight to what California CPAs and other affiliated financial professionals need to ensure they can continue to provide the highest level CPE to its users. Being adjacent to the membership organization, we work hand-in-hand with users to understand what skills are missing at the ground level of the CPA profession. We can quickly turn that information into courses that our user base needs.

Q: How will diversity, equity and inclusion fit into the

Education Foundation agenda?

A: We need more accountants, plain and simple. Creating a pathway to leadership to new opportunities will increase the pipeline the profession needs. In turn, the Education Foundation will have the opportunity to provide additional services to a greater population. Furthermore, CalCPA and the Foundation is taking a leadership role to help accounting firms and finance professionals

identity opportunities to create pathways for people who may have not seen a financial professional path in the past.

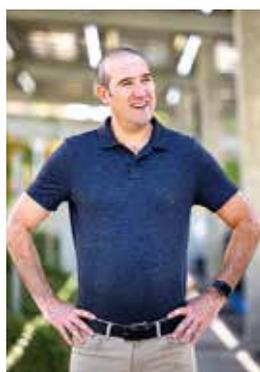
Q: What is the Education Foundation doing to innovate/compete in a crowded CPE market?

A: Hopefully I'm not giving away any secrets here! The CPA firm industry has changed dramatically over the last decade. Mergers and acquisitions have moved many of the small firms that once exclusively used CalCPA courses into larger firms that have their own education training platforms. In addition, there are many more options that CPAs have today to fulfill their CPE needs. The Education Foundation is working in two areas:

1. To make our course catalog easier for users to attend. So rather than loading up on eight-hour courses, we are moving more heavily into one-, two- and four-hour on-demand courses that are more direct and specific to the users' requirements.
2. We are working with larger firms to get our high-level content on their learning and training platforms so we can access many accountants who are relatively cut off from our courses at this time.

Q: What are the new needs of CalCPA members, and what is the Foundation doing to meet those?

A: Time. Who has excess time? No one! Our members need to be able to access the information they need quickly and where they are. The Foundation is working tirelessly to improve the course catalog and to create more self-study opportunities to help our members and any financial professional around the country find the information they need and quickly consume that information on their schedule. 



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them—and that it is delivered in an electronic form that brings an experience to the customer that they want more.

Q: Any new topics being offered people can expect?

A: Soft skill training! The accounting profession has changed. The role of the CPA is not only to provide the high level expertise and management of accounting and tax issues