

# CalCPA State Technology Group

## Tech Survey Responses

### Income Chapter Presidents

#### General Comments

##### Bakersfield

I am the incoming president and we were just discussing this last week. We have identified a couple of individuals that will be leading the group and I will forward this to them.

##### San Diego

Great minds think alike – I was planning on bringing the technology chair back but possibly with some changes (if that is okay.) My responses are below. Feel free to give me a call if you would like to discuss any of it.

##### San Francisco

We discussed this at our Board meeting this morning. We previously had a Tech Chapter committee, but it was dissolved for lack of participation. We do not intend to revive the committee. I understand that the Peninsula chapter has a committee, but it is not active. The East Bay chapter is more active, and we might consider doing something with their committee. I also understand that a few of our members attend the state committee. For our Chapter, we discussed perhaps one program a year...something simple. Maybe all software, gadgets and apps available/beneficial to a CPA practice.

### 1) Do you have a Technology Group and/or Leader in your chapter?

Channel Counties - We do not. We've put out feelers in the past, but there were no takers. We have been finding that overall participation with CalCPA has been waning in recent years.

San Diego - No, not currently.

Central Coast – No

San Joaquin - Garry Browning is set to be the chair for 2013-14 year. For the 2012-13 year Ralph Bucchetti was the chair of committee but he has stepped down.

Orange County/Long Beach – We have had a monthly Technology lunch meeting in the non-tax season months for a number of years. Attendance usually was from 5 to 20 members – depending on the topic. Since our group leaders have been so involved with the chapter board they have not had the time in the last couple years to run the group.

### 2) If not, do you feel such a group is feasible in your chapter? If not, is grouping up with neighboring chapters to form such a group a possibility?

Channel Counties - I do not feel such a group is feasible. The Channel Counties Chapter, like a couple of other small chapters, has a geographical divide. To the north Santa Barbara and Goleta to the south Ventura and Oxnard. This is so much so, that we have separate CPA Discussion Groups and A&A Discussion Groups for each locale. The idea of utilizing time and effort to get a tech group off the ground would be misguided. Also, due to geography grouping with a neighboring chapter seems unlikely.

San Diego - Yes, but the last few years we have not had a lot of success. At one point we had an all-day CPE event which I think was well attended, but I believe there were some issues with the chair/CPA/CPE requirements so the event was discontinued. (I will see if I can get more details.) I

was thinking bringing back the chair/committee and also having them look at the social media advertising (i.e. posting our events to LinkedIn, Twitter, etc as well as trying to get the CALCPA Connect up and running in our chapter.) \

**Central Coast** - It probably would not be worth member's time to travel too far for a meeting at a neighboring chapter.

**San Joaquin** - Our chapter has held 2-hour CPE classes in the past and usually sponsors an annual QuickBooks update class.

**Orange County/Long Beach** - Due to traffic and distance, grouping up with the neighboring chapters is not realistic. It is difficult enough to get attendance just within our own chapter.

### 3) What would you like to see from the State Tech Group? (i.e. provide speakers to the chapters, webinars, white papers, etc.)

**Channel Counties** - A set of best practices for operating in the digital age that can be easily accessed and effectively communicated to membership.

**San Diego** - I would be interested to hear more about what they have been doing - I think we may have been out of the loop because we haven't had a chair. Regardless, I think all of that would be helpful. Maybe posting potential topic ideas on the (protected) area of the website would be helpful for chairs as well. I am a huge fan of the webinars because of the reduced time commitment from members since I think many members may find these events to be more optional than say CPE events related to technical tax/audit topics.

**Central Coast** - Yes. Our members are interested in the topics.

**San Joaquin** - It would be great if the State Tech group provided a list of willing speakers or webinars that could be used at local CPE event. Our chapter is attempting to have every committee including technology put together at least one CPE event in the coming year and coming up with topics and speakers is always the most difficult part of planning the events.

**Orange County/Long Beach** - Focus on the technology questions of CPAs and CPA firms and provide information from their experts on those issues. It sounds like the group covers some important topics in their meetings, but it needs to find a way to communicate it to the average CalCPA member.

### 4) What do you feel are the biggest technology challenges to CPAs and CPA firms in your chapter?

**Channel Counties** - Frankly, it's all over the board. The smaller firms and sole practitioners need leadership and advice it can depend on to make decisions to best automate and protect their systems. The larger firms really need a place where their IT in-house professionals can turn for information, etc.

**San Diego** - Personally, I think it would be great to see more on some of the emerging technologies/related security issues (ie - moving the cloud, Drop Box, Google Drive, etc) I am not sure if some of our problems were also related to marketing it to people who have expressed an interest in Technology when there is probably an overlap with MAP.

**Central Coast** - Moving to the Cloud. Adjusting to the greater use of Tablets (Ipad).

**San Joaquin** - Implementation of "suite" of software or "best of breed" products  
Mobilization of workforce, working from home/client locations

**Orange County** - What hardware, software, apps, and related technologies are being used successfully? If I want to buy a new laptop, if I go to the Dell web site they ask me a LOT of questions where I have no idea what they are asking and what I really need.

# CalCPA State Technology Group

## Tech Survey Responses

### Technology Chairs

#### General Comments

Los Angeles – I second all of Barry's comments.

#### 1) Does your Chapter Technology group meet? If so, how often?

East Bay - We had one meeting and speaker in the last year.

East Bay - We meet about 2-3 times per year.

Los Angeles - The Eastside Technology Group meets monthly, producing a meeting each month for the Pasadena Discussion Group.

Inland Empire – We have historically been a committee of one, and so no committee meetings per se.

Orange County/Long Beach – We have had a monthly Technology lunch meeting in the non-tax season months for a number of years. Attendance usually was from 5 to 20 members – depending on the topic. Since our group leaders have been so involved with the chapter board they have not had the time in the last couple years to run the group.

#### 2) If you are NOT meeting, what are the roadblocks to meeting? (i.e. finding speakers or topics, attendance, etc.)

East Bay - Reliable expected attendance can be the largest roadblock. When obtaining speakers is can be very helpful to know the number of people they will be speaking to. Never want to bring a great speaker in only to have them speak to 5 people. This seems to get better if you hold more consistent meetings and perform more direct contact with interested parties.

Los Angeles - We ARE still meeting, but finding fresh topics and good speakers are becoming more of a problem for us. Fortunately for us, our attendance is not a problem, as the Discussion Group pretty much populates each weekly meeting, including our meeting.

Inland Empire - Just haven't had a committee to meet.

Orange County/Long Beach - Attendance is a big issue. In the last few years, social media presentations have brought large crowds. Web sites were mildly attended. Very technical issues not very many.

#### 3) Do you attend the State Technology Group meetings? If so, how often? If not, why not?

East Bay - Yes. Once in person and once online in 2012. Will attend in Sacramento.

East Bay - Yes. Just about all of them. Next week will be the first one I've missed and it's due to my son being hospitalized for 3 weeks and me being left home with my other son so I can't get away to Sacramento for 3 consecutive days (Already there for CPA day at the capital and counsel meeting)

Los Angeles - Yes, I attend – if not in person, then by webcast – almost every meeting.

Inland Empire - Yes – make approximately 75% of them.

Orange County/Long Beach – I attend most of the meetings in-person and the others virtually.

**4) If you have attended the State Technology Group meetings, did you find them useful to you?**

**East Bay** - Yes.

**East Bay** - Yes, they can be very useful. The adobe meeting was fascinating, the Microsoft meeting was very interesting and useful, and updates regarding new technologies from tech shows are really fun to hear about. Some of the other presentations can be hit or miss. I think the meetings thrive when we are talking about cutting-edge technologies or getting deep into commonly used, but rarely mastered, technologies used by CPA's. These advanced topics are great and hard to find within the CPA profession. Sometimes we tend to get a little bogged down by committee process and communication methods instead of focusing on productive technology discussions. There's only so much discussion needed regarding whether Listserves are better than Yahoo groups are better than google plus etc...

**Los Angeles** - I generally find the State Tech meetings to be useful. However, more recently, these meetings have been less attractive to me. We do not get agendas until right before the meeting, so we don't know what will be presented or discussed. Several time recently, the presentations have been topics we arranged for our local group (so, I had heard them before).

**Inland Empire** - Sometimes more than others, although I always get something out of the RAM Session segment. It's also good when we have outside presenters and get insights into new software and technologies we can pass on to the membership.

**Orange County** - Some of it is very useful. Some of it is useless. Like many CalCPA State groups, I think the group has evolved into a "club" and is not effectively leading or helping CalCPA members with their technology issues and questions.

**5) What would you like to see from the State Tech Group? (i.e. provide speakers to the chapters, webinars, white papers, etc.)**

**East Bay** - Suggesting or providing speakers for chapter meetings would be very helpful.

**East Bay** - A lot of the same. Maybe with just a little refinement. Many of the state presentation have been very very good. Some other meetings feel a little last-minute and thrown together. I think webinars can be a useful service to the profession but I know we may step on a number of other groups toes by offering free technology services online. A listing of willing speakers and interesting current topics could be very useful for local chairs who have a hard time planning and booking local meetings. Might be useful for all the local chairs to have complete an online schedule of their planned topics, speakers and meeting dates for others to view and gain ideas from.

**Los Angeles** - I have enjoyed the instruction we have received by holding our meetings at large Tech companies (i.e. Microsoft, Adobe). These meetings have given me material to bring back to my local Chapter meeting. Providing speakers would be a good benefit, if that can be arranged. Producing webinars and white papers is a good idea - but, it seems like we have a limited population of "tech-savvy" people to make those happen. While we are all involved with Tech in some way, not all of us dedicate significant time to Tech services in our practices.

**Inland Empire** - Like you, I think we need to find creative ways to bring more value to members. I like the idea of putting together brief (less than 1 hour) You Tube-like presentations on technology tips or maybe a quarterly "Tech Briefing" from the committee providing information on technology issues.

**Orange County** - I would like to see the State Technology group become a resource for technology information for CPAs. I've noticed that other than Los Angeles, East Bay and to a lesser degree, Orange County, the other chapters have no local tech presence or can't support one. Through CalCPA Connect and other resources we need to provide technology information to CPAs and CPA

firms through webinars, YouTube, white papers, a speaker list, etc. State Tech meetings should be videotaped and edited for posting or at least a detailed written summary provided.

**6) What do you feel are the biggest technology challenges to CPAs and CPA firms in your chapter?**

**East Bay** - Determining when to implement new technologies. Knowing what is available to implement.

**East Bay** - Adapting to online presence, especially regarding document storage and communication. There are so many options and so many risks that it can be very hard to parse through to the best and safest option. We can offer a great service to our clients by mastering this new frontier, but if we jump in too deep without understanding the security risks we could get ourselves into big trouble.

**Los Angeles** - Security and privacy. Keeping up with technological changes to improve how we leverage technology.

**Inland Empire** - It changes so fast and is becoming more of an integrated part of our business rather than an "add-on" as in the past. I also think we forget that the average member isn't as connected to the technology as many of us are, and that there are new people entering the profession who may have different levels of familiarity with the technology being used in the profession. Of course, the "old guard" still has many holdouts who are not interested in learning the newer technologies and this tends to thwart efforts to move forward.

**Orange County** - What hardware, software, apps, and related technologies are being used successfully by CPAs and CPA firms.

# CalCPA State Technology Group Recommendations

## Survey Results

Of the 14 chapters, I received responses from 6 of the incoming Chapter Presidents and 6 of the current Chapter Technology chairs (representing 4 of the Chapters). They all provided excellent feedback about their Chapter groups (if they have one), the State Tech Group and the needs of their Chapter members.

It was interesting that other than in high density population areas or special speakers, local tech groups do not seem to be an effective way to discuss and communicate technology issues.

Based on these responses, I am recommending the following:

- 1) For the next term beginning in May, add a State Tech Committee Vice Chair position. This person would be the “Chair-Elect” for the next term, would assist the Chair in preparing for the quarterly meeting, and take some of the burden so the Chair can govern effectively.
- 2) Add a “Secretary” position. This person would record the quarterly meetings through either video, audio or in written form for posting as a resource for CalCPA members.
- 3) Add a “Education Resources (?)” position. This person would be responsible for creating and maintaining a speaker list and scheduling monthly webinars for CalCPA members on technology topics. This would involve working with CalCPA to provide the technology (webinars, etc.).
- 4) The State Tech Group meetings should be more focused to identify the top technology needs of CPAs and CPA firms, finding or providing the information, and then using online resources for members to find it. Many potential topics were identified in the surveys.
- 5) The State Tech meetings should be more focused on providing these resources to it’s members in effective ways. It seems now that we discuss the needs but haven’t been effective in taking it beyond the group.