2015-2018 Strategic Plan

Initiative: Advocacy

Enhance the voice of the profession in Lansing, build relationships, create resources, contribute to the State of Michigan's Comeback and show value to members/public through successes

2015 - 2016	2016 - 2017	2017 - 2018
Objective: Cultivate relationships between key officials and the MICPA **High Level Actions** • Build relationships with legislators to enhance the voice of the profession in the face of major turnover resulting from the November 2014 elections • Further enhance relationships with the Governor, LARA, Treasury and State Board of Accountancy • Monitor possible changes on the horizon for groups appointed by the governor, e.g. State Board of Accountancy and Committees, therefore preparing for change • Monitor "movements" of the Governor as the political climate evolves for the future • Pursue relationships with key officials and potential candidates in anticipation of the November **2016** election **Tactics** • Actions taken in advance of a legislative or regulatory undertaking	**Objective: Cultivate relationships between key officials and the MICPA** **High Level Actions** • Pursue relationships with key officials as determined by November **2016** election while maintaining relationships previously cultivated to enhance the voice of the profession • Further enhance relationships with the Governor, LARA, Treasury and State Board of Accountancy • As November 2018 election approaches, create appropriate actions to follow the future of the Governor and state officials • Monitor possible changes on the horizon for groups appointed by the governor, e.g. State Board of Accountancy and Committees, therefore preparing for change **Tactics** • Determine potential turnover prior to 2016 State and Federal House election • Revise inventory of established relationships	**Objective: Cultivate relationships between key officials and the MICPA** **High Level Actions** • Continue to enhance relationships with State and Federal legislators to strengthen the voice of the profession in the face of major turnover resulting from the November 2016 elections • Identify and cultivate relationships with potential November 2018 gubernatorial candidates • Pursue relationships with key officials and potential State and Federal legislative candidates in anticipation of the November **2018** election • Continue to monitor possible changes on the horizon for groups appointed by the governor, e.g. State Board of Accountancy and Committees, therefore preparing for change **Tactics** • Analyze and reassess the inventory of relationships with candidates for

• Create an inventory of new legislator relationships to cultivate including contacts, strategy and outcomes • Proactively monitor, in light of possible movement and changes, noting those more or less likely to change through 2018 including but not limited to LARA, State Board of Accountancy and committee appointments • Assess and prepare for potential changes each year, the impact and need to manage risks • Utilize resources to identify potential candidates for State and Federal office • Understand the makeup and trends within the current legislature to identify potential 2017-2018 legislative session leadership **Metrics** • Relationships established with 20 key officials, rank-ordered by strategic position • Relationships established with 128 legislators through basic touch points including working with the Legislative Advisory Group • Cultivated existing relationships with officials and state government agencies • Monitored and affected the makeup of specific state Committees that align with MICPA's mission • Tracked touch points related to current relationships	• Reexamine the 20 key officials for changes • Continue to utilize resources (PAA and member feedback) to identify potential candidates for State and Federal office • Continue to understand the makeup and trends within the current legislature to identify potential 2017-2018 legislative session leadership • Cultivate relationships with the winners of the 2016 State and Federal House elections including newly elected leadership **Metrics** • Potential turnover prior to 2016 State and Federal House elections was determined • Inventory of relationships revised and updated • 20 key officials have been examined and revised as appropriate • To the extent possible relationships with potential State and Federal candidates and likely legislative leaders were established • To the extent possible relationships with elected State and Federal Representatives and legislative leaders were established	Governor, State and Federal legislature • Proactively monitor, in light of possible movement and changes, noting those more or less likely to change through 2018 including but not limited to LARA, State Board of Accountancy and committee appointments **Metrics** • Relationships established with 20 key officials, rank-ordered by strategic position • Relationships established with 128 legislators through basic touch points • Positioned MICPA in preparation for 2018 State and Federal elections with knowledge of turnover and candidates • Cultivated existing relationships with officials and state government agencies • Monitored and affected the makeup of specific state Committees that align with MICPA's mission

• To the extent possible relationships with potential State and Federal candidates and likely legislative leaders were established		
Objective: Leverage the expertise of the CPA profession in Michigan's Comeback **High Level Actions** • New initiatives are sought and accepted **Tactics** • Continue to enhance relationships with key policy makers including but not limited to the Governor's staff to be in a position to take on new initiatives • Create the environment and relationships to put CPAs on government committees • Pay particular attention to state "agencies/groups" that will be under appointments from a potential new Governor **Metrics:** • MICPA has analyzed and considered participation in new high-visibility initiatives • Monitored for new initiatives from government through touch points with policy makers • Monitored potential changes to agencies • Analyzed and promoted opportunities for CPAs on state committees	**Objective: Leverage the expertise of the CPA profession in Michigan's Comeback** **High Level Actions** • Identify and seek opportunities to contribute to Michigan's comeback **Tactics** • Continue to enhance relationships with key policy makers including but not limited to the Governor's staff to be in a position to take on new initiatives • Maintain the environment and relationships to put CPAs on government committees **Metrics:** • MICPA has analyzed and considered participation in new high-visibility initiatives • Monitored for new initiatives from government through touch points with policy makers • Monitored potential changes to agencies • Opportunities for committee appointments continue	**Objective: Leverage the expertise of the CPA profession in Michigan's Comeback** **High Level Actions** • Identify and seek opportunities to contribute to Michigan's comeback **Tactics** • Pay particular attention to state "agencies/groups" that will be under appointments from a new Governor • Continued to maintain the environment and relationships to put CPAs on government committees • Lay the foundation with potentially new elected officials to ensure continuation of environment conducive to CPAs being appointed to government committees **Metrics:** • MICPA has analyzed and considered participation in new high-visibility initiatives • Monitored for new initiatives from government through touch points with policy makers • Monitored potential changes to agencies

		• Opportunities for committee appointments continue
Objective: Enhance members' awareness of advocacy and regulatory efforts **High Level Actions** • Identify new ways to communicate advocacy and regulatory efforts over and above existing tools, i.e. The Advocate, etc. focusing on non-publication communication • Evaluate and improve existing advocacy and regulatory communications **Tactics** • Review and analyze both publication and non-publication communication efforts to understand member satisfaction with current efforts • Develop an annual plan to expand non-publication communication efforts with members • Develop ways to improve current efforts through enhanced content and distribution targeting • Benchmark the readership of all current publication communications **Metrics:** • Analyzed current communication efforts and understand member satisfaction • Developed and began to implement a non-publication annual plan	**Objective: Enhance members' awareness of advocacy and regulatory efforts** **High Level Actions** • Evaluate and improve existing advocacy and regulatory communications In line with members' perceived importance **Tactics** • Continue to implement an annual plan to expand non-publication communication efforts with members • Continue ways to improve current efforts through enhanced content and distribution targeting **Metrics:** • Have fully implemented the non-publication communication expansion plan • MICPA metrics for advocacy publication open rates have increased by 5% of the previous year's benchmark based on development of new tools in year one	**Objective: Enhance members' awareness of advocacy and regulatory efforts** **High Level Actions** • Evaluate and improve existing advocacy and regulatory communications **Tactics** • Develop a way to measure member satisfaction with non-publication communication • Evaluate enhanced content and distribution targeting and adjust if needed **Metrics:** • Begun to measure member satisfaction of non-publication communication efforts • Enhanced content and distribution targeting was evaluated and adjusted as needed • MICPA metrics for advocacy publication open rates have increased by 5% of the previous year's benchmark based on development of new tools in year one

• Improvement of current efforts were achieved through enhanced content and distribution targeting • Established a benchmark of publication readership		

2015-2018 Strategic Plan

Initiative: Sponsorships/Business Development

Create outreach to Michigan communities through the profession. Cultivate relationships that provide reciprocal value for members, partners and the association

2015-2016	2016-2017	2017-2018
Objective: All sponsors and MICPA recognize mutual value **High Level Actions** • Creation of a revenue model for tolerance of each type of client • Measure the definition of success **Tactics** • Develop needs analysis of a "great" sponsor • Develop vetting process for identifying ROI of a sponsor relationship • Utilize technology to identify a structured process to track a history of sponsorship details	**Objective: All sponsors and MICPA recognize mutual value** **High Level Actions** • Creation of a capacity model (man power) based on addition and renewal of sponsorship **Tactics** • Evaluate sponsors through the vetting process determining ROI of existing sponsor relationships • Identify and change scope of sponsors with limited ROI to create opportunity for other beneficial relationships with greater return • Seek similar new "great" business development/ sponsors based on analysis from year one • Track new sponsors based on findings	**Objective: All sponsors and MICPA recognize mutual value** **High Level Actions** • Based on the capacity model determine how to grow sponsorship and business development **Tactics** • Continue the vetting process of sponsor relationships • Determine adequate staffing to continue business development growth

Metrics
• Analyzed the number of sponsors in each category of good, great, etc.
• Defined the revenue generated by each sponsor group
• Measured revenue increases vis a vis activity; staff/client satisfaction
• Utilized technology tracking history to assist with building profile of a “great” sponsor
	Metrics
	• Measured revenue increases vis a vis activity; staff/client satisfaction based on year one high level action of creating revenue model
	• Evaluation of sponsors level of ROI determined through vetting process
	• Increased the number of new and existing sponsors with “great” status
	• Improved relationships create increased revenue
	  ○ Retention
	  ○ Recruitment
		Metrics
		• Measured revenue increases vis a vis activity; staff/client satisfaction based on year one high level action of creating revenue model
		• Improved level and number of “great” sponsors

Objective: Maximize the public relations value of sponsorship and partnerships **High Level Actions** • Define and apply PR value to every relationship • Utilize profile of a CPA to increase sponsorship or partnership revenue • Recognize sponsors and partners **Tactics** • Track new ways to generate earned PR • Enhance a master marketing plan segmenting the different target audiences • Create profile of a CPA to assist sponsors, prospect efficiently, better sell and identify targets • Regularly recognize partners and sponsors via MICPA platforms	**Objective: Maximize the public relations value of sponsorships and partnerships** **High Level Actions** • Promote and demonstrate PR value with each sponsor • Communicate the consistent message of value to various constituents (staff, leadership, members, attendees, sponsors, partners, general public) **Tactics** • Develop communications plan to show earned PR value to sponsors • Implement master marketing plan to segmented target audiences • Identify new ways to recognize the value sponsors and partners bring to the CPAs	**Objective: Maximize the public relations value of sponsorships and partnerships** **High Level Actions** • Identify and communicate the PR value for the partner or sponsor and the MICPA • Seek outside PR opportunities to enhance the value of partner/sponsor relationships **Tactics** • Develop a report to quantify the PR value of being a MICPA partner/sponsor • Communicate with partners/sponsors how the relationship brings PR value to both organizations (sponsor and MICPA) • Determine 3rd party PR opportunities to showcase and thank partners/sponsors

Metrics • Master marketing plan is created and segmented by target audiences • Created a profile of a CPA to better sell and explain opportunities • Tracked earned PR value in-house • Partners and sponsors are recognized via MICPA platforms	**Metrics** • Developed communications plan to show earned PR value to sponsors • Master marketing plan for segmented target audiences was implemented • New ways identified to assist sponsors in recognizing value	**Metrics** • Report developed to quantify the PR value of all partner/sponsor relationships • Communicated with all partners/sponsors the PR value of the relationship • 3rd party PR opportunities identified and utilized
Objective: Business development recognizes opportunities and drives partners and sponsors **High Level Actions** • Cross MICPA populations/staff between departments in order to identify new opportunities • Identify initiatives that impact all members regardless of location **Tactics** • Identify vendors that MICPA staff work with in order to build sponsorship packages that market their services to target CPA member audiences • Identify vendors of MICPA members throughout the state to leverage opportunities for sponsorship, collaborated business opportunity and/or new partnerships • Develop the criteria for the submission of wish list items to be submitted by	**Objective: Business development recognizes opportunities and drives partners and sponsors** **High Level Actions** • Leveraging the profile of a sponsor to target opportunities in specific segments (i.e.: banking, human resource services, etc) **Tactics** • Proactively reach out to potential sponsors within targeted segments • Develop departmental wish list (projects, materials, programs, etc.) that could be funded by sponsors or partners • Develop higher level recognition options for sponsors/partners • Analyze current partners and determine value to members and MICPA e.g. sponsors, affinity partners, etc.	**Objective: Business development recognizes opportunities and drives partners and sponsors** **High Level Actions** • Recognize unusual and potential areas for revenues to reach new partners and sponsors **Tactics** • Seek out new and innovative opportunities for partners and sponsors • Determine possible sponsors or partners for funding wish list items **Metrics** • New opportunities identified and partner and sponsor opportunities for them filled • Determined wish list items and considerations for sponsors/partners to fund

departments for potential sponsor or partner funding **Metrics** • Departments are cross selling • Revenue is being maximized • Criteria for wish list funding developed	**Metrics** • New sponsorships were created in targeted segments • Departments shared their wish list and business development reviewed and prioritized • Define premiere sponsor/partner • Identified value of partners to members	
Objective: Strategic Partner relationships generate different revenue value and business benefits (i.e. Hospice of Michigan, Red Cross, Race for the Cure) **High Level Actions** • Annually review community service aspect and commensurate business benefit **Tactics** • Develop and track new ways to generate earned media • Measure the ROI of a strategic partner to identify qualifications for potential new additions • Utilize technology to identify a structured process to track a history of partnership details **Metrics**	**Objective: Strategic Partner relationships generate different revenue value and business benefits (i.e. Hospice of Michigan, Red Cross, Race for the Cure)** **High Level Actions** • Annually review community service aspect and commensurate business benefit **Tactics** • Effectively communicate the value of earned media from partner relationships to members • Utilize previously examined ROI and connect with suitable strategic partners **Metrics** • Members are aware of the earned media value from partner relationships • Connected with new strategic partners	**Objective: Strategic Partner relationships generating different revenue value and business benefits (i.e. Hospice of Michigan, Red Cross, Race for the Cure)** **High Level Actions** • Annually review community service aspect and commensurate business benefit • Members appreciate and value the benefit of strategic partner relationships **Tactics** • Enhance communication to drive member participation in strategic partner relationship opportunities **Metrics** • Increased member participation

• Tracked new opportunities for earned media among existing strategic partner relationships • Utilized the vetting process to determine the ROI of a strategic partner relationship		

2015-2018 Strategic Plan

Initiative: Learning

Enhance member learning opportunities that embrace the changing landscape of adult learning and meet state licensure requirements

2015-2016	2016-2017	2017-2018
Objective: Future of Learning: Engage and interact with attendees to enhance learning **High Level Actions** • Develop and identify the types of engagement tools* that will enhance the learning experience of attendees in MICPA courses *Includes gamification, Conference I/O, case studies, bite size CPE, breakouts in the round and attendee interactive content • Continue to research new and evolving CPE trends (Competency vs. compliance) • Look to the national Future of Learning endeavor as a base and direction regarding the landscape for education **Tactics**	**Objective: Future of Learning: Engage and interact with attendees to enhance learning** **High Level Actions** ▪ Continue to research and explore the use of new education trends ▪ Experiment and incorporate appropriate new education trends into offerings ▪ If CPE requirements change (rules and regulations), ensure they are incorporated in all training **Tactics** ▪ Attend relevant continuing education training opportunities to be up to date on new education trends ▪ Incorporate new instructors and vendors into CPE offering	**Objective: Future of Learning: Engage and interact with attendees to enhance learning** **High Level Actions** ▪ Incorporate CPE trends and requirements into offerings as appropriate ▪ Be on the forefront of cutting edge developments in enhanced continued learning **Tactics** ▪ Continue to follow information from the AICPA and NASBA on the future of learning ▪ Adjust evaluations to measure the effectiveness of Future of Learning tools ▪ Adjust evaluations to measure the effectiveness of Future of Learning tools ▪ Evaluate effectiveness of new techniques in the eyes of the

▪ Incorporate the Conference I/O tool into live education programs including seminars, conferences and early bird ethics ▪ Incorporate the Conference I/O tool into Leadership activities that include Members Advisory Symposium, MICPA Board meetings, MICPA Committees and Task Force meetings ▪ Investigate new room layouts to increase interaction with the speaker and other attendees ▪ Research instructors and vendors that can provide new interactive learning ▪ Train instructors on the new tools and the Future of Learning techniques. Use the training as one of the criteria for instructor selection ▪ Creation of instructional design materials to enhance speaker effectiveness ▪ Continue to follow information from the AICPA and NASBA on the future of learning ▪ Staff to continue to attend educational conferences that provide information on the future of learning, current CPE trends and techniques used by other state societies	schedule who provide interactive learning ▪ Select instructors have been trained and now utilize new tools and techniques ▪ Continue to follow information from the AICPA and NASBA on the future of learning ▪ Adjust evaluations to measure the effectiveness of Future of Learning tools ▪ Continue to monitor, adjust, and report on changes to CPE rules and regulations **Metrics** ▪ At the end of year two, 33% of conferences and seminars, early bird ethics, Members Advisory Symposium, MICPA Board meetings, MICPA Committee and Task Force meetings will contain selected engagement tools identified in year one *Includes gamification, Conference I/O, case studies, bite size CPE, breakouts in the round and attendee interaction content. This refers back to the tactic in year one to include engagement tools in CPE events and Leadership events. ▪ Course evaluations continue to reflect a positive response to enhanced learning initiatives based on tactics in year one ▪ All communications include up to date education requirements based on continued monitoring of rules and regulations	instructors and solicit feedback on enhancements ▪ Continue to monitor, adjust, and report on changes to CPE rules and regulations **Metrics** ▪ At the end of year three, 50% of conferences and seminars, early bird ethics, Members Advisory Symposium, MICPA Board meetings, MICPA Committee and Task Force meetings will contain selected engagement tools identified in year one. *Includes gamification, Conference I/O, case studies, bite size CPE, breakouts in the round and attendee interaction content. This refers back to the tactic in year one, to include engagement tools in in CPE and Leadership events. ▪ Designed a tool and survived instructors on the effectiveness of new techniques. ▪ All communications include up to date education requirements based on continued monitoring of rules and regulations

Metrics • At the end of year one, 15% of conferences, seminars, early bird ethics, Members Advisory Symposium, MICPA Board Meetings, MICPA Committees and Task Force meetings will contain selected engagement tools identified in year one *Includes gamification, Conference I/O, case studies, bite size CPE, breakouts in the round and attendee interaction content • Appropriate MICPA Staff attend, document, and share information gained from Interchange, Midwest, MSAE OrgPro, and other training opportunities • Course evaluations reflect a positive response to enhanced learning initiatives		
Objective: Enhance the value of MICPA Learning/CPE to our attendees **High Level Actions** • Create programs that provide value that members do not find in other local competitor education programs • Emphasis on development of new programs, processes and consolidated	**Objective: Enhance the value of MICPA Learning/CPE to our attendees** **High Level Actions** • Review new programs and processes to measure value • Research ways to continue to improve communication and marketing of MICPA education programs • Explore the changing world of technology and how it	**Objective: Enhance the value of MICPA Learning/CPE to our attendees** **High Level Actions** • Review new and ongoing programs, processes to measure if they continue to have value • Determine if competing education providers have caught up to the MICPA and what is needed today to

communications to appeal to attendees **Tactics** ▪ Create education programs using local speakers that will provide a cost savings to attendees and MICPA ▪ Consolidate CPE marketing materials for ease of use and the reduction of printing and mailings ▪ Third party tracker entries are benchmarked for future measurement ▪ Enhance event evaluation and evaluation review process to better understand MICPA's unique learning offerings **Metrics** • Created a report to benchmark courses/topics in third party tracker entries for future measurement. • Reduction in printing and mailing expenses • Attendance is maintained or increased based on new marketing approach • Increase in participants' value received via evaluations by comparison of participant scores on programs as to satisfaction/value of programs compared to prior year	may help make the education and marketing processes convenient **Tactics** ▪ Analyze feedback and evaluations to ensure local speakers are maintaining the quality of seminar, webinar, and conference programming ▪ Determine goals based on year one experience for the evaluation of the enhanced CPE marketing approach ▪ Continue to better understand our members and attendees and how to reach them more effectively ▪ Compare the current year's information to benchmarked third party tracker entries **Metrics** ▪ Reviewed feedback and evaluations on local speakers and ensured they are maintaining a high level of quality and made adjustments where needed ▪ Created the goals to measure the enhanced CPE marketing approach ▪ Utilized third party tracker data to better understand our value to attendees	maintain our status as the leader in learning • Determine if all marketing can be transitioned to electronic delivery, exclusively • Identify trends in MICPA CPE participation **Tactics** • Examine continued evolution of CPE marketing approach • Analyze what marketing is drawing registrants to MICPA courses • Continue to compare current year's information based on benchmarked data from third party tracker entries • Determine what trends to track and how to utilize and analyze the results **Metrics** • A shift has occurred to MICPA courses from third party courses as it compares to the 2013/2015 CPE reporting period. This refers back to the tactic in year one where MICPA tracker information was benchmarked to measure the success of attracting third party education users to MICPA offerings • Analyzed the trends of courses taken by attendees and identified the information leading to the "Amazon concept" • Determined detailed demographic information from third party tracker entries and enhanced our

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<tr><td></td><td></td><td>MICPA value to those attendees</td></tr>
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<td>Objective: Expand the use of the MICPA Tracker to provide a competitive advantage for the Association

High Level Actions
• Provide the use of the MICPA Tracker to all Michigan CPA’s with the assistance of LARA
• Refine the tools and information that the tracker provides. Use to expand and enhance offerings and participation

Tactics
• Build awareness of reporting CPE credits to the state of Michigan through the MICPA tracker at events throughout the spring of 2015
• Following the end of the reporting year in June 2015, review course information taken by CPA’s on the MICPA Tracker to provide new topics or enhance our offerings to meet the attendee’s needs and gain competitive advantage
• Leverage the MICPA Tracker advantage for ease of use and ease of reporting CPE hours to the State of Michigan
• Create a report of who used the tracker in the 2013/2015 reporting period

Metrics</td>
<td>Objective: Expand the use of the MICPA Tracker to provide a competitive advantage for the Association

High Level Actions
• Develop a strategy to increase tracker users
• Continue to refine tools for members, to make the process of tracking CPE easier
• Continue to review data of courses taken by Tracker users
• Use information that the tracker provides to expand and refine MICPA offerings

Tactics
▪ Develop efficient system for reviewing and analyzing third party tracker entries
▪ Create groupings through sorting of data by relevant fields, including course date, vendor, course title, and field of study
▪ Enhance communication through all possible avenues to grow the number of member and nonmember tracker users
▪ Explore the potential for tracking additional credentials and requirements

Metrics
▪ Designed levels of filtering third party tracker entries to create improved reporting and analysis</td>
<td>Objective: Expand the use of the MICPA Tracker to provide a competitive advantage for the Association

High Level Actions
• Measure the increase of Tracker users to determine if the strategy to increase users’ needs to be adjusted
• Continue to review data of courses taken by Tracker users
• Use information that the tracker provides to expand and refine MICPA offerings
▪ Utilized third party tracker data to better understand our value to attendees

Tactics
▪ Measure new programs and vendors engaged as a result of third party tracker analysis
▪ Analyze member and nonmember tracker usage to measure success of communication efforts

Metrics
▪ New programs and vendors utilized as a result of third party tracker analysis
▪ Assessed if the communications strategy to grow tracker usage was successful</td>
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Created a report to benchmark member and nonmember tracker data
Utilized third party tracker information to identify new courses and vendors
Increased number of tracker users

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Created a system to measure the communications to members and nonmembers, translating to increased tracker usage
Analyzed additional requirements for other credentials (ie ABV, CFP, etc) and CPE needs (ie Yellow Book)

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Objective: Engage CPE competitors to look for potential opportunities

High Level Actions

Create relationships with CPE competitors
Determine if any could become collaborators on joint programs

Tactics

Gain market intelligence on why and how competitors provide CPE
Review strengths and weaknesses of the competitors
Determine if any competitors could and would provide partnerships opportunities based on predetermined criteria to vet the competitors

Metrics

Identified three competitors as potential strategic partners based on criteria developed in first year

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Objective: Engage CPE competitors to look for potential opportunities

High Level Actions

If a competitor or competitors are determined as possible partners, reach out to them to discuss a future project

Tactics

Collaborate with identified competitors as new partners for learning offerings and/or administrative services
Measure return on investment of partnerships
Create criteria for success of new and existing partnership events and collaborations

Metrics

Partnered with three competitors
Analyzed new and existing partnerships to determine success
Identified partnerships that resulted in positive ROI

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Objective: Engage CPE competitors to look for potential opportunities

High Level Actions

Review program for value and success
Utilize knowledge gained from initial experience to proactively attract additional partners

Tactics

Determine if existing partnerships should continue, be changed, or phased out
Seek out new partners who align with existing successful partnership criteria

Metrics

Existing partnerships analyzed and plans initiated for moving forward
Proactively engaged potential partners and worked to create successful arrangements

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• Created criteria to vet competitors for potential collaboration. • Used collected intelligence to collaborate on joint educational project(s) this year		

2015-2018 Strategic Plan

Initiative: Membership

Provide and convey value to diverse member groups, while exploring opportunities to support succession of the profession in Michigan

2015-2016	2016-2017	2017-2018
Objective: Explore and analyze potential members to effectively convey the value of membership (Recruitment Focus) **High Level Actions** • Identify all potential members based on relevant information • Emphasize inclusion of all potential members within BIGE **Tactics** • Utilize new technologies to identify and retain up to date information • Leverage relationships with other organizations to gain access to all potential fellow and affiliate members • Address Fellow-Not Licensed members based on current membership trends **Metrics** • Obtained better contact information for potential members • Worked with LARA and NASBA to obtain CPA Exam Passer information • Stabilized number of members in the Fellow – Not Licensed membership category	**Objective: Explore and analyze potential members to effectively convey the value of membership (Recruitment Focus)** **High Level Actions** • Focus communications and campaigns on specific potential member profiles • Include members within BIGE for communication and campaigns **Tactics** • Develop/enhance membership recruitment campaigns targeted at BIGE • Leverage the CGMA to promote memberships within the BIGE group • Identify ideal BIGE members to be the spokespeople for being a member • Ensure accessibility to membership of non-CPA CGMAs **Metrics** • Shared the benefits of membership with BIGE groups while promoting the CGMA • Reviewed and analyzed recruitment campaigns for effectiveness • Utilized BIGE members to share the value of being a member via recruitment	**Objective: Explore and analyze potential members to effectively convey the value of membership (Recruitment Focus)** **High Level Actions** • Measure the effectiveness of all recruitment campaigns for public accounting and BIGE **Tactics** • Analyze the effectiveness of including members within BIGE for communication and campaigns • Utilize tracking of the effectiveness of membership recruitment campaigns • Adjust recruitment campaigns based on gathered information to increase effectiveness **Metrics** • Continued to review and analyze all recruitment campaigns for effectiveness • Updated and adjusted membership recruitment campaigns based on collected feedback

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<td>campaigns and communications
• Created non-CPA CGMA membership category and prepared for 50/50 recruitment efforts in partnership with AICPA</td>
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<td>Objective: Understand MICPA members and create relevant value propositions
(Retention Focus)

High Level Actions
• Create tools to analyze members in public accounting and BIGE to better understand their level of engagement during/throughout member tenure
• Meet with member firms and companies to understand what brings them value
• Regularly communicate with AICPA and other state societies to understand their membership efforts

Tactics
• Create a scoring system to identify an engaged member
• Create a comparison of identified issues and membership value of MICPA firms and companies
• Identify and understand membership efforts of the AICPA and other state societies</td>
<td>Objective: Understand MICPA members and create relevant value propositions
(Retention Focus)

High Level Actions
• Utilize member relationships to create opportunities to provide value to both the member and the MICPA
• Meet with member firms and companies to understand what brings them value
• Regularly communicate with AICPA and other state societies to understand their membership efforts

Tactics
• Implement an internal scoring system within Aptify to analyze member involvement (Oct. 2016)
• Create a plan to increase and track member engagement.
• Engage members in an appropriate manner to better understand individual member issues and values</td>
<td>Objective: Understand MICPA members and create relevant value propositions
(Retention Focus)

High Level Actions
• Assess that the value of membership is relevant and conveyed to all member groups
• Meet with member firms and companies to understand what brings them value
• Regularly communicate with AICPA and other state societies to understand their membership efforts

Tactics
• Utilize Membership Survey results to increase our understanding of our members for possible reward programs and other new initiatives as well as understanding the member perspective on alternative membership models
• Research the timeline of a member to understand natural attrition</td>
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Metrics • Comparison created and action plan designed to address the needs of firms and companies • Contacted the AICPA and other state societies to understand their membership efforts	• Research rewards programs for members based on activity within the MICPA **Metrics** • Identified the score for all members based on engagement within the association • Action plans created based on feedback • Researched rewards programs to better understand the value for the MICPA and for members • Utilized new ideas gained from the AICPA and other state societies	**Metrics** • Increased member engagement scores over 2015/2016 established baseline • Increased retention over 2016/2017 retention numbers • Created the projection for the natural attrition of members • Analyzed new membership models to understand if they would increase member satisfaction and their effects on revenue

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Objective: Strengthen and enhance the future of the CPA profession
(Future Focus)

High Level Actions
- Leverage our partnership with MAF and other key organizations (ALPFA, NABA, FEI, RMA, etc) to raise awareness of the CPA profession among students and graduates
- Enhance relationships with universities to ensure continued awareness of the value of the CPA credential.
- Include a focus on diversity and inclusion in outreach efforts
- Expand the exposure of the CPA to non-Accounting Majors within colleges and universities

Tactics
- Create new relationships with changing department chairs and other key faculty on campuses
- Seek opportunities for student and emerging leader interaction
- Monitor the activities of the National Commission on Diversity and Inclusion
- Create a campus presentation that incorporates non-accounting majors as attendees

Metrics
- Created relationships with key faculty members at colleges and universities

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Objective: Strengthen and enhance the future of the CPA profession
(Future Focus)

High Level Actions
- Measure effectiveness of MICPA outreach endeavors
- Include a focus on diversity and inclusion in outreach efforts
- Leverage our partnership with MAF and other key organizations (ALPFA, NABA, FEI, RMA, etc) to raise awareness of the CPA profession among students and graduates
- Encourage exam candidates to sit for the CPA exam (f/ Board Meeting Roundtables)

Tactics
- Maintain a strong focus on the pipeline of the profession at both the student and emerging leader level
- Develop strategies to drive eligible candidates to complete CPA exam (f/ Board Meeting Roundtables)
- Redesign and revamp the way we tag/categorize people. This includes interest tracks and possibly position descriptions, specific business or companies, Program Development topics, etc.

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Objective: Strengthen and enhance the future of the CPA profession
(Future Focus)

High Level Actions
- Identify non-CPA members and communicate to them the value of becoming a CPA
- Include a focus on diversity and inclusion in outreach efforts
- Leverage our partnership with MAF and other key organizations (ALPFA, NABA, FEI, RMA, etc) to raise awareness of the CPA profession among students and graduates

Tactics
- Analyze future focused questions/answers from the membership survey to create deliverables

Metrics
- Created deliverables to strengthen and enhance the future of the profession based on survey results

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• Provided increased opportunities for student and member interaction • Responded to new ideas presented by the National Commission on Diversity and Inclusion • Expanded college visit presentations to include non-accounting majors at one location	**Metrics** • Expanded the involvement of emerging leaders in public accounting and BIGE within the MICPA • Number of activities developed to increase exam passers (f/ Board Meeting Roundtables) • Redesigned and revamped interest tracks, position descriptions and business types to better understand our members.	

Objective: Keep Peer Review relevant and a part of the MICPA **High Level Actions** • Review, understand, and respond appropriately to 2015 DOL findings • Monitor federal level changes in Peer Review keeping MICPA aware and a part of the process • Position Michigan as an important Peer Review state • Maintain and communicate relevant Peer Review resources for MICPA members and reviewers **Tactics** • Maintain a flexible peer review team that will adjust to and implement upcoming changes • Create a communications campaign to include posting of information and push of information through MICPA avenues • Create an evaluation to better understand a firm's experience of the peer review process • Change processes and procedures based on federal level information where required and appropriate **Metrics** • Created a Peer Review evaluation to be completed by participating firm at the conclusion of a review	**Objective: Keep Peer Review relevant and a part of the MICPA** **High Level Actions** • Ensure MICPA's Peer Review Program is flexible and adaptable to all changes. • Monitor federal level changes in Peer Review keeping MICPA aware and a part of the process • Maintain and communicate relevant Peer Review resources for MICPA members and reviewers **Tactics** • Maintain a flexible peer review team (staff, RAB and technical reviewers) that will adjust to and implement upcoming changes • Encourage new firms and individuals to become involved in peer review to maintain a strong and vibrant team of reviewers • Continue to monitor the MICPA website to ensure it remains relative and up to date for communicating to firms, peer reviewers and the public regarding current peer review information and any and all upcoming changes to peer review • Review and change processes and procedures to stay efficient and effective in the oversight of	**Objective: Keep Peer Review relevant and a part of the MICPA** **High Level Actions** • Maintain and communicate relevant Peer Review resources for MICPA members and reviewers • Monitor federal level changes in Peer Review keeping MICPA aware and a part of the process

• Evaluated effectiveness of communications to members • Monitor changes based on information at the federal level	peer review for Michigan as well as adjust the MICPA system to adhere to ever changing AICPA processes and procedures where required and appropriate **Metrics** • Meet with firms and individuals to determine and encourage their interest in performing peer review. • Evaluated effectiveness of communications to members • Monitored and implemented changes based on AICPA information and the AICPA proposed evolution of peer review administration	
Objective: Share the benefit of the CPE Tracker with all Michigan CPAs **High Level Actions** • Use the CPE Tracker as a key member benefit when promoting membership in the MICPA • Michigan Department of Licensing and Regulatory Affairs informs Michigan CPAs of enhanced CPE Tracker • Grow membership based on CPE Tracker user information **Tactics** • Michigan CPAs are able to use the CPE Tracker as part of the process to renew their Michigan CPA License	**Objective: Share the benefit of the CPE Tracker with all Michigan CPAs** **High Level Actions** • Communicate CPE Tracker enhancements to Michigan CPAs • Enhance the functionality of the CPE Tracker to better serve the needs of members and firms/companies • Grow membership based on CPE tracker user information **Tactics** • Give MICPA Firm Administrator Members reporting tools to view firm staff CPE progress	**Objective: Share the benefit of the CPE Tracker with all Michigan CPAs** **High Level Actions** • Michigan CPAs are able to use the CPE Tracker as part of the process to renew their Michigan CPA License • Added CPE Tracker enhancements lessen the burden of audits for Michigan CPAs • Grow membership based on CPE Tracker user information **Tactics** • Michigan CPAs are able to use the enhanced CPE Tracker as part of the process to renew their Michigan CPA License

• Michigan CPAs are able to attach information from 3rd party courses • Gather feedback from members on their experience using the tracker • Review Tracker information quarterly to glean potential member leads and membership opportunities • Identify and share important CPE Tracker reminders and information with MICPA members **Metrics** • Allowed members to provide tracker feedback • New members were obtained through tracker information • Tracked number of members using Tracker to report CPE and renew their licenses	• Explore opportunities to grow membership based on nonmember CPE tracker users **Metrics** • Firm administrators have increased access to tools to enter and monitor their staff CPE hours • Created a strategy to effectively market membership to nonmember CPE Tracker users	• Communicate enhancements to the CPE tracker to all users • Continued to explore opportunities to grow membership based on nonmember CPE tracker users **Metrics** • Increased the usage of the CPE Tracker over the previous reporting period • Implemented a communications plan to educate CPE Tracker users on enhancements • Utilized the strategy to market membership to nonmember CPE Tracker users
Objective: Investigate new membership categories for CPAs and Non CPAs **High Level Actions** • MICPA will remain on the cutting edge of CPA state society membership inclusiveness • We will seek out unique membership opportunities that will benefit MICPA and the current members **Tactics** • Investigate AICPA Non CPA Membership initiative and understand its purpose and goals • Review other CPA society initiatives and speak with appropriate contacts to understand them	**Objective: Investigate new membership categories for CPAs and Non CPAs** **High Level Actions** • MICPA will remain on the cutting edge of CPA state society membership inclusiveness • We will seek out unique membership opportunities that will benefit MICPA and the current members **Tactics** • Create a plan to introduce new membership categories into the MICPA, including non-CPA CGMAs • Recruit and market new membership categories	**Objective: Investigate new membership categories for CPAs and Non CPAs** **High Level Actions** • MICPA will remain on the cutting edge of CPA state society membership inclusiveness • We will seek out unique membership opportunities that will benefit MICPA and the current members **Tactics** • Introduce new MICPA membership categories • Market new membership opportunities based on the new membership categories

Metrics	Metrics	Metrics
• Researched new membership categories, including Non CPAs	• Plan developed to incorporate new membership and participation opportunities that included the AICPA 50/50 endeavor	• Plan approved and implementation begun for new opportunities for membership and participation