



Alaska Leadership Academy

ENGAGE. CONNECT. EMPOWER.

"To create a sustainable Leadership Academy of the AKCPA for emerging CPAs (3-7 years of experience in the profession) that will help participants discover, sharpen and foster their leadership skills, enabling them to engage more in their own professional development and career; to connect them with the AKCPA through increased involvement with the Society; and to empower them to be active, thoughtful and effective leaders in their personal lives, their career and the accounting profession."

February 10, 2017

The Alaska Society of CPAs is very excited to launch its 3rd Alaska Leadership Academy (AkLA) in the fall of 2017. The program is aimed at increasing the leadership skills of emerging professionals at the beginning of their career, and your assistance is critical to the success of this effort. The second Academy took place in June 2016 and was as successful as the first Academy.

Below is some important information for you to consider.

WHY DO THIS?

It is critical that the Society take the lead in creating a pool of talent which organizations can draw on to fill leadership roles, especially as succession becomes an increasing concern in the next 15 years. While some larger firms may have a program in place for developing staff, smaller ones may have limited access to resources. In addition to professional development, we envision these members would serve on AKCPA committees, be leaders in their communities and join the profession's future visionaries.

HOW ARE CANDIDATES CHOSEN?

Individual candidates will complete a comprehensive application form, and obtain a firm partner sponsorship for the year. Applications are due in the AKCPA office by May 1st, and acceptance letters will be sent out no later than May 30th. Amy Cooper, Michael Elliott, and Donna Salter (with assistance from past participants) are providing the content for the program, and the classes are eligible for CPE credit. Candidates will be reviewed, interviewed, and selected by a designated leadership team.

WHEN WILL THE SESSIONS TAKE PLACE?

The Academy will consist of a one-day session in early **December 2017**; a webinar in **May 2018**; and a two-day session on **June 4th and 5th, 2018**. We encourage all in-coming participants to join us at the 2017 Annual Meeting in Seward, Alaska, May 31st – June 2nd, 2017.

Participants are asked to commit to all aspects of this program and to share in its cost. Each member accepted into the program will be responsible for a non-refundable fee of \$600.

We are committed to providing a quality program that will contribute to the future success of your firm, the Alaska Society of CPAs, and the profession as a whole. Please encourage and support your emerging CPAs by urging them to apply to the program, and give them your support as they grow during the year.

Please do not hesitate to get in touch with either of us, or Crista Burson at the AKCPA, with questions or for more information.

Sincerely,

Rebecca Martin, AKCPA President
907.341.3750
rmartin@ak-estate-cpa.com

Amy Cooper, Leadership Committee Chair
907.474.5745
akcooper@alaska.edu



**Interested in the AKCPA's 2017 Leadership Academy?
Here is some information which may help you.**

Who will attend?

Members in good standing of the Alaska Society of CPAs who have 3-7 years in public accounting, industry, government or education. The emphasis is on emerging professionals.

How much time will I have to commit?

The Academy will consist of one one-day session in early **December 2017**; a webinar in **May 2018**; and a two-day session **June 4 and 5, 2018**. We encourage all in-coming participants to join us at the 2017 Annual Meeting in Seward, Alaska, May 31st – June 2nd, 2017.

Where will the sessions be held?

In-person sessions will be at the Alaska Society of CPAs' office in Anchorage.

Who will lead the training and why were they chosen?

Amy Cooper, Michael Elliott and Donna Salter are returning speakers and will be leading the training. A short biography is included for each speaker for your reference. Some sessions may be led by other professionals based on their expertise.

Why do I need a managing partner or industry equivalent to sign off on my application?

Having a managing partner (or equivalent) review and sign off will ensure both applicants and the firm sponsors understand their commitment to the training.

How will my participation benefit my organization?

This training will provide each candidate with a set of **life** skills. You will become a valuable asset with a broad range of tools that extend well beyond your specific job title.

How many hours of CPE will I earn?

The training is recommended for 24 CPE hours. We will send you a CPE certificate upon completion of the course.

What is the cost and who will pay it?

Each member accepted will be responsible for a non-refundable fee of \$600. Payment is due by December 1, 2017. The participants are asked to commit to all aspects of this program and to share in its cost. The fees can be paid by you, your firm or organization or some combination of the two.

What will be my commitment to the Society following graduation?

You will be expected to serve on one of the standing committees of the AKCPA, as board member, or on a task force of the AKCPA. Please refer to <http://www.akcpa.org/about/committees> for a listing with descriptions of the various committees available.

Want more information, or an application?

Get in touch with Crista Burson, Executive Director; akcpa@ak.net or 907-562-4334.



About the Speakers



Amy K. Cooper, CPA, CFE, CGMA, MPAcc is a full-time accounting instructor at the University of Alaska Fairbanks and the faculty advisor for the student accounting organization, Great Alaskan Accounting People (GAAP), and for the IRS VITA program. As the advisor for these groups, she advises and mentors students as they progress through their accounting degrees, growing from young students to emerging professionals. Amy worked for nine years in public accounting, including at Arthur Andersen in Seattle, WA; Walsh, Kelliher & Sharp in Fairbanks; and FM Strand & Associates in Anchorage. Amy has served as the president of the Alaska Society of CPAs and is the current chair of the AKCPA's Leadership Committee. She is a graduate of the AICPA 2012 Leadership Academy. Amy currently serves on the AICPA Young Members Leadership Committee and the AICPA Nominations Committee.

Donna Salter is from the AICPA in Durham, North Carolina. Donna was the director of professional development for the Utah and North Carolina CPA Associations for over twenty-five years. She also served as a trainer for five years with Talecris Biotherapeutics where she was responsible for the development and delivery of professional development programs for over two thousand employees. In addition, she is a certified professional facilitator providing Franklin Covey's 7 Habits of Highly Effective People and Leading at the Speed of Trust and VitalSmarts' Crucial Conversations training to various groups and organizations. In 2011, Donna joined AICPA as a senior manager of the Young CPA Initiatives team. She is committed to developing and cultivating best practices for young member engagement, opportunities for leadership development, and encouraging young CPA members to give back to the profession through AICPA involvement.



Michael Elliott is a graduate of Franklin University where he received his Bachelor of Science in Accounting and Business Administration. Michael passed the CPA exam and was licensed as a CPA in the State of Ohio in 2009, at the age of 22. At the time of licensing, he was the youngest CPA in the state of Ohio. Michael has been in public practice since 2007 and is currently Managing Principal at a small, local CPA firm located east of Cleveland in rural Northeast Ohio. In his position, Michael serves the needs of a wide variety of customers including those in manufacturing, agriculture, construction and professional services. The bulk of the firm's work load is in taxation and consulting. They primarily serve small and medium sized, local businesses, but are beginning to grow a customer base outside of the State of Ohio. Michael is currently working to transition the firm from legacy accounting practices into a more innovative firm, focusing on meeting the full service needs of the customer.

Michael is a member of both the Ohio Society of CPAs as well as the American Institute of CPAs. He is a 2012 graduate of the AICPA's Leadership Academy. Currently, Michael serves on the AICPA's PCPS Executive Committee and on the Executive Board of the Ohio Society. He also serves as a board member and treasurer of local non-profit Academy and is the incoming vice-chair for the 2016 AICPA EDGE conference.

One of Michael's passions is public speaking and he has spoken at several national conferences on a variety of subjects including the dynamics of being an entrepreneurial CPA as well as the process of transitioning a firm from the current ownership to a new generation.

Outside of the office, Michael is very involved with his church and enjoys playing basketball. Michael is married to Kristen and has two children – daughter Ana and son Luca.



What are prior participants saying about the AKCPA Leadership Academy?

“The Leadership Academy was a perfect space to ask questions and to think about what you really want out of your accounting career. They pack a lot into the few days they have you. The Academy provides time to reflect on your leadership style, relationships with work and clients, and focusing your way forward in your career.”

-Rhonda Bohart, (Seward)

“I am very grateful for my firm encouraging me to attend the Alaska Leadership Academy (AkLA). Participating in AkLA increased my confidence in my knowledge and abilities. It was inspiring to meet other CPAs from around Alaska, and I have a greater appreciation for my role in the future of the profession.”

-Theresa Harris, CPA, Elgee Rehfeld Mertz, LLC (Juneau)

“Leadership Academy provided me with the opportunity to develop new skills. I find myself using them in both my professional and personal life, especially the idea of ‘begin with the end in mind.’ I am also grateful for the connections made during the brief time spent together and how those of us have remained in contact since.”

-Nicole “Nico” Herbert, CPA, Cook & Haugeberg, LLC (Fairbanks)

“I can sum up my experience in two words...Career Changing! The opportunity to be led by professionals from the AICPA and experienced leaders from around the state was priceless. Working on success skills in a collaborative environment, drawing from the unique experiences of the other participants was a once in a lifetime experience. I’m so thankful that my Directors at Thomas, Head & Greisen, PC were able to recognize the value the academy provided and were willing to invest in me.”

-Thomas Huling, CPA, Thomas, Head & Greisen, PC (Anchorage)

“AkLA provided me with the skills that allowed me to become a more valuable and effective asset to our firm while engaging with other young professionals across the State.”

-Sarah Villalon, CPA, University of Alaska Foundation (Fairbanks)

“While attending the Leadership Academy, I was able to establish professional networks and was inspired to get more out of life professionally and personally. The speakers and the information were engaging and relevant. I highly recommend this opportunity to any eligible candidate as the possibilities of growth and learning are endless. I left motivated and feeling connected to the individuals that I was able to experience this opportunity with.”

-Kelly Ward, CPA, Robinson & Ward, PC (Fairbanks)

“I thought it was great that everyone participated because everything was so fun and interactive that it would be difficult to just sit, watch, and listen. It wasn’t just a lecture, but instead this was an opportunity for you to grow. The best piece of advice I received was this. “If you’re in a group of colleagues, sometimes it’s fun to be the opposite how you normally are and to let us others do the same.” For example, I’m good about speaking up in

class, answering questions, and offering opinions, but this time I tried sitting quietly there being a shy person so others that are normally shy and don't usually speak up would have more opportunity to jump in. It's amazing because it works. I have since used this in other arenas in addition to our profession. What I learned from that is that there are fantastic leaders in an organization, but they can be quiet and shy around a group of strangers even though we are colleagues. So by allowing them that moment to jump in allows them to grow, while the rest of us gain great insight. I also learned from listening to others that whether you work in a smaller town or a larger city, we actually deal with very similar issues. Overall, I'm very thankful for the experience because I learned about how to work with and lead others, but I definitely learned more about myself."

-Rachel Hanks, EA, MBA, Warwick & Schikora, PC, (Fairbanks)

What did partners have to say about their participants after attending the AKCPA Leadership Academy?

"The Leadership Academy's impact on our participant was noticeable immediately. Her interest in the accounting profession and her role in the profession, and our firm, were greatly enhanced through the interaction with the leaders and other participants of the academy. She returned to us with increased confidence, a more defined focus of what she wants to do and willingness to get involved in helping with the future of the industry, Alaska Society of CPAs and our firm."

-Karen J. Tarver, CPA, Partner, Elgee Rehfeld Mertz, LLC (Juneau)

"The enthusiasm that the participants gain for the profession is contagious!"

Kathleen Thompson, CPA, Partner, Cook & Haugeberg LLC (Fairbanks)

Leadership Academy Application Form
Submit application by: May 1, 2017



Submit Application via email to akcpa@ak.net or mail to:

AKCPA
2600 Cordova Street, Suite 211
Anchorage, AK 99503

Personal Information

Name:

[] Male [] Female

Address:

Home telephone:

Email:

Professional Information

Current employer:

Position:

Length of time with employer:

Address:

City:

State:

Zip:

Office telephone:

Cell phone:

Email:

Date of CPA License:

AKCPA Member: [] Yes

Sponsor

All leadership academy candidates must be sponsored by an employer, educator, or state society member.

Name:

Office telephone:

Email:

Professional Volunteer Activities

Organization:

Committee/Purpose:

Office Held:

Achievements:

Community Volunteer Activities

Organization:

Committee/Purpose:

Office Held:

Achievements:

Presentations, Honors, Awards and Other Achievements

Why do you want to participate in the AKCPA Leadership Academy?

Additional Information

Practice Area

- Academia**
- Business & Industry**
- Consulting**
- Government**
- Public Accounting**
- Small <10**
- Medium 10-24**
- Large 25+**

Expectations of Leadership Academy Participants:

1. Complete assignments
2. Review Leadership Action Plan Goals and results with Managing Partner or Mentor
3. Participants agree to volunteer for service on an AKCPA Committee or task force
4. Participants agree to mentor future Leadership Academy class participants

I have read and understand the above expectation statement:

Participant Signature

Sponsor Signature

Date: _____