

## **Ohio Chapter, Association for Accounting Administration July 16, 2004 Meeting**

The July 2004 meeting of the Ohio Chapter, Association for Accounting Administration was held at the OSCPA office in Dublin, Ohio on July 16, 2004.

The following members were in attendance:

Craig Baldauf	Schlabig & Associates, Ltd.	Akron, OH
Tammy Boring	Snyder & Company	Lancaster, OH
Patty Czechowski	Packer, Thomas & Company	Youngstown, OH
Carol Davis	Ohio Society of CPA's	Dublin, OH
Fred Dillon	Simpson & Osborne, CPAs, A.C.	Charleston, WV
Jim Fahey	Brott, Mardis & Co., CPAs	Akron, OH
Paul Fellingner	Shriver & Co.	Cincinnati, OH
Julie Hicks	Brockman, Coats, Gedelian & Co.	Akron, OH
Jen McCormick	Battelle & Battelle LLP	Dayton, OH
Linda Nay	Whalen & Company, CPAs	Worthington, OH
Bev Rench	Thorn, Lewis & Duncan, Inc.	Dayton, OH
Jeff Shumway	Battelle & Battelle LLP	Dayton, OH
Sue Tipping	Plante & Moran, PLLC	Toledo, OH
Sharon Trabbic	William Vaughan Company	Maumee, OH
Dina Unrath	McCrary & McDowell LLC	Pittsburg, PA
Mary Kay Wagner	Cohen & Company	Cleveland, OH

### **Presentation**

This meeting's presentation was "Sustainable Performance Strategies for Accounting Practices," presented by Dina Unrath of McCrary & McDowell LLC.

### **Business Meeting**

Minutes of the previous meeting were approved, as was the Treasurer's report.

Cash in bank at May 21, 2004 was \$3,953.57. Income for the period was \$502.25 and expenses were \$1,120.00. Cash in bank at July 16, 2004 was \$3,335.82.

## **Old Business**

Our September speaker will be a representative from Archive-it, a paperless product that Craig is going to be using in his firm.

Jim encouraged everyone to go to the website for the National Resource Bank and check it out and add information to it. It can only be as good as the people who use it and participate in it.

Bev Rench received the chapter scholarship and attended the national conference in June. She gave a brief report from the conference and thanked the chapter for the scholarship.

A discussion was held regarding the Ohio Chapter signing up for the pre-employment investigative services offered by the speakers from the May meeting. Fred spoke with Celeste Donato of Employment Investigative Services (EIS) about providing services as a membership benefit of AAA. She is supposed to compile a proposal for the next national board meeting. The possible issues with using EIS at the national level is that we don't want the mailing list to get out and that membership doesn't like the member benefits to be too product focused. We decided that if national isn't interested in using the services of EIS that we should pursue it at the state level.

If you have topics and/or speakers for our chapter meetings, please e-mail Kim Tanner.

## **New Business**

Tammy received a list of AAA members from Ohio, from National. She will e-mail the list to the group so we can follow up on members who haven't attended a chapter meeting.

If you did not go to National, you can get a copy of the CD that contains all the handouts from the conference by e-mailing the National office. You can also find the summary for each session on the AAA website.

Fred gave a recap from National. He encouraged our members to get involved on the board by volunteering to help current board members or to apply to serve on the board. Fred told us that some of the speakers that they are interested in scheduling for the 2005 Symposium are David Meister and Jim Collins. If you have ideas for speakers or topics for next year's symposium, e-mail Kim Fantaci at National.

Paul suggested that the results from the surveys that National sends out should be sent to the Chapter Presidents to share in the chapter meetings. This would generate more interest in attending the chapter meetings. As an alternative he suggested that if you participate in the survey you should get the results for free. Fred will check into these options and will also check on the fees National charges for the surveys.

The business meeting was adjourned.

## **Next Meeting**

The next meeting will be held on Friday, September 10, 2004.