

2024-2025 COMMITTEE

OBJECTIVES & PROJECTS REPORTING FORM

Use the space below to list your objective(s) and projects for the upcoming year. An **OBJECTIVE** is a long-range goal that may span one year, or several years. A **PROJECT** is an immediate, short-term activity that leads to accomplishing the objective(s). **Please email this completed form along with your completed budget form to the WVSCPA at wvscpa@wvscpa.org by Friday, May 10.** This information will be reviewed by the WVSCPA CEO and any questions/issues will be clarified with the committee Chair prior to final approval for the 2024-2025 fiscal year. The approved objectives and projects form for all committees will be posted on the WVSCPA website after the budget for the fiscal year is approved during the Annual Meeting in June.

COMMITTEE NAME Accounting & Auditing

Objective(s) To educate members on A&A standards, act as an advocate/liaison for governmental/professional organizations, and be a resource for all society members

PROJECTS / INITIATIVES (action plans)	PLANNED DATE OF COMPLETION	ASSIGNED TO
Conduct quarterly conference calls to discuss upcoming A&A topics	Quarterly	Group
Prepare brief summaries or articles of upcoming A&A standards	Quarterly	Group
Explore other areas of practice to cover more in-depth for newsletter	As needed	Group
Explore opportunities for non-technical articles or stories to contribute	Quarterly	Group
Maintain regular communications w/State Auditor	Annually	Chris Deweese & Mary Fleece
Act as a resource for society members	Ongoing	Group
Contribute efforts as needed to groups or committees within the Society on other initiatives (such as those identified by resource groups or other committees)	Ongoing	Group

Signed by: Kristin Moody **Committee Chair**

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Committee Name

Awards

Objective(s)

PROJECTS / INITIATIVES (action plans)	PLANNED DATE OF COMPLETION	ASSIGNED TO
form subcommittee to discuss accounting awards	2024-2025	David
Propose to keep nominations alive for 3 years	" "	Kaitlin/avi
Propose to have the ability to move nominations to correct category	" "	Kaitlin/avi
Propose to change Witschey Award to Chapter of the year award	" "	" "

Signed by: _____
Committee Chair

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COMMITTEE NAME Banking, Industry, & Government

Objective(s) Networking, training, and educational outreach

PROJECTS / INITIATIVES (action plans)	PLANNED DATE OF COMPLETION	ASSIGNED TO
#1: Work with the Society to hold 3 to 4 virtual education sessions during the year. Topics discussed include practical topics such as legal topics and AI software.		
#2: Provide posts to the Society of what we are doing for social media engagement.		
#3: Work with local chapters to do 1 or 2 student events like student night. Events would be pickle ball and disc golf.		
#4: Expand outreach to industry. Obtain contact lists and either do direct mailers or email.		

Signed by: *Beth Farley* Committee Chair

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Committee Name

RCC

Objective(s)

to assist students with the completion of projects and assist in their development

PROJECTS / INITIATIVES (action plans)	PLANNED DATE OF COMPLETION	ASSIGNED TO
<u>Research Fair</u>	<u>9/20/24</u>	
<u>QAS Award</u>	<u>April 30, 25</u>	
<u>Compass Ambassadors Program</u>	<u>Ongoing</u>	
<u>High School Outreach</u>	<u>Ongoing</u>	

Signed by: [Signature]
Committee Chair

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Committee Name

Small ~~Practice~~ Firm Committee

Objective(s)

see below

PROJECTS / INITIATIVES (action plans)	PLANNED DATE OF COMPLETION	ASSIGNED TO
<i>Communicate with existing participants and reach out to new small practitioners to attend</i>		
<i>Maybe Morgantown meeting this year or next?</i>		
<i>Continuing the 4 Roundtable Meetings for 2024</i>	<i>November</i>	

Signed by: _____

Committee Chair

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Committee Name

Tax Committee

Objective(s)

1) To provide educational opportunities to membership in the area of federal, state, and local taxation.
2) To maintain, strengthen, and enhance the relationship between the WVSCPA, the WV State Tax Department, and the IRS to the extent feasible.

PROJECTS / INITIATIVES (action plans)	PLANNED DATE OF COMPLETION	ASSIGNED TO
Promote and increase awareness of WV Tax Institute	Fall 2024	KAH/SMD
Meet w/ WV Tax Department to have timely updates to WVSCPA	throughout year	TBD
Year-end webinars for State Taxes	Nov/Dec	TBD
Try to work w/ WV Tax Department to collaborate on forms release	throughout year	TBD

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Committee Chair

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Committee Name

Young CPAs

Objective(s)

To build awareness of young CPAs within the WVSCPA and to provide a source for young CPAs to become active in the society. We will do this by creating social events to assist with the building of relationships amongst peers; mentoring students with the recruiting process to encourage, retain, and educate about the profession; making an impact in our community through service; and introducing members to the Society and other committees.

PROJECTS / INITIATIVES (action plans)	PLANNED DATE OF COMPLETION	ASSIGNED TO
Month of Service	July 2024	Morgan/Shea
Baseball Game Outing in Charleston	TBD	Casey Klages
Bridge Day Tailgate	Oct 19, 2024	Morgan/Shea
YCPA Facebook Page	TBD	Morgan/Shea
List Serve Emails	June 2024	Shea
Quarterly YCPA Zoom Meetings		Morgan/Shea
YCPA WVU Football Tailgate	Fall 2024	Morgan/Shea
Committee Leadership Paid Annual Meeting Attendance - 2025	June 2025	Morgan/Shea
YCPA Event at Annual Meeting	June 2025	Morgan/Shea

Signed by: _____
Committee Chair