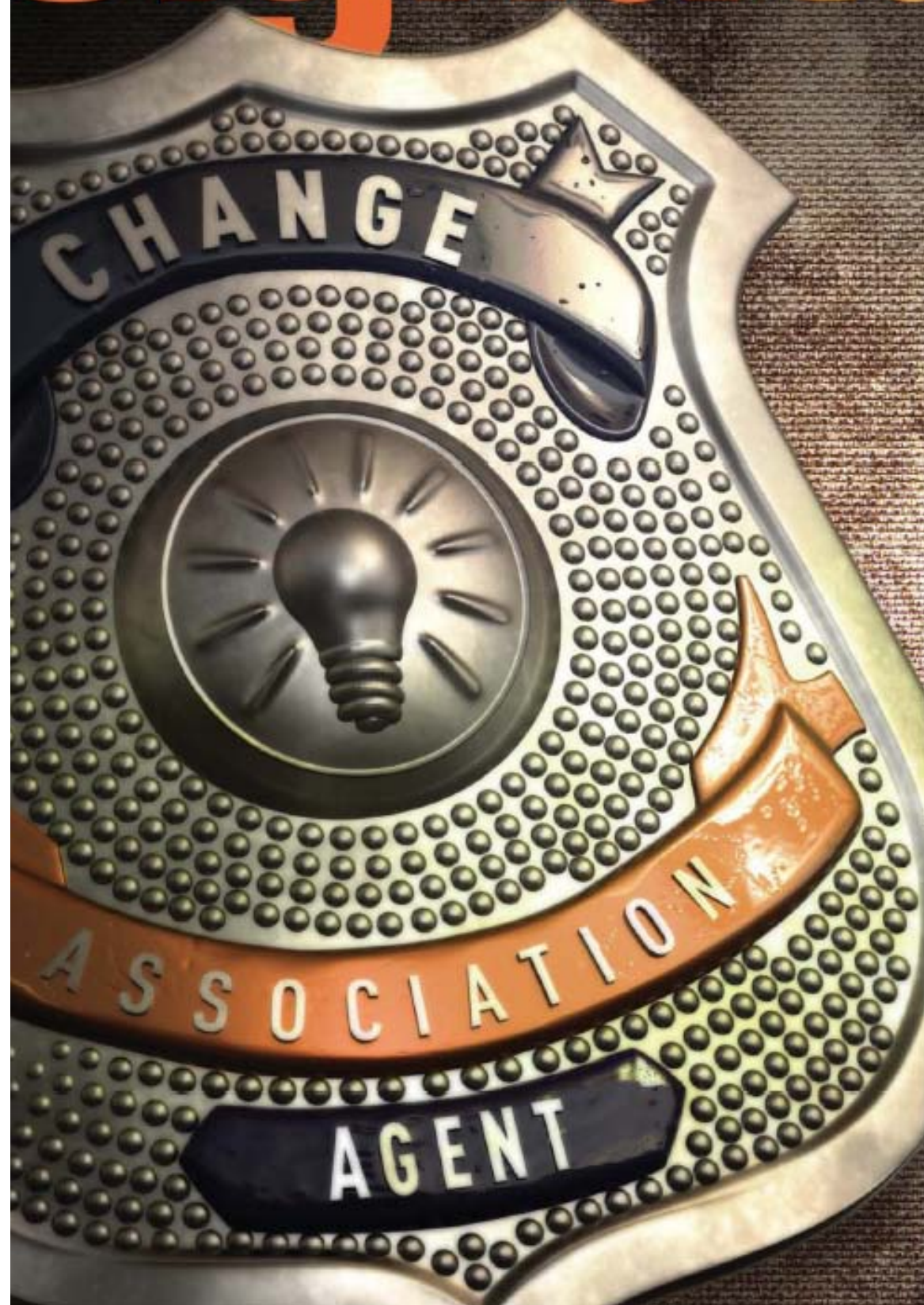


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HOW TWO ASSOCIATIONS
FOUND THEIR VOICE

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Here's how an exciting new research project helped two associations find their voice in the marketplace and keep their core mission relevant.



BY JOANNEY CLEAVER

They had run out of things to say.

Founded decades ago, the two groups that advocate for women in accounting—the Accounting & Financial Women's Alliance (AFWA) and the American Woman's Society of CPAs (AWSCPA)—had once been the refuge of women in a male-dominated profession.

But as women gained traction in accounting, now representing 55 percent of college graduates with accounting degrees, what message did the two groups have for the profession? Though few women still reach the top echelon—only 17.5 percent are partners at public accounting firms—AFWA and AWSCPA had no proprietary research that could serve as a framing context for their communication and advocacy.

Their boards knew that they had to find their voice—and use it.

Board members knew that their personal experiences likely reflected commonly encountered obstacles by other women in the accounting field, but gut instinct hardly constituted an advocacy platform, says Vivian Moller, who was the national president of AFWA (at that time known as the American Society of Women Accountants). The groups' web content had drifted off course. Social media was just one more channel to fill with compelling messages they didn't have.

In the midst of a multi-year mission and messaging overhaul, their answer came when AFWA and AWSCPA seized the opportunity to co-sponsor an annual research project new to the profession,

but based on a methodology already used by other associations and publications. Called the Accounting MOVE Project, now in its fourth year, this annual research project measures and supports the advancement of women in public accounting. The research is comprised of two components:

1 An annual theme that is a deep dive into a topic relevant to advancing women. In 2012, the project looked at how strategic community service offered opportunities for skill building and networking critical for women to qualify for partner. In 2013, the project is looking at the underlying dynamics of retaining younger women in the partnership pipeline.

2 An annual demographic measurement of women at key levels, from new hire to partner. Why? Because consistent measurement and reporting of women in the talent pipeline challenges the profession overall and provides invaluable benchmarks as individual firms try to retain more women.

Today, through the data, case studies, personal profiles, and news furnished by the Accounting MOVE Project, the two groups have a communication annuity. "It gave us the language to change the conversation," says Moller, who was the incoming AFWA president in 2010 when the first MOVE Project results were announced. "It quantified our intuition with reality and strategy, creating openings for us to talk with members, prospective members, and sponsors."

The research project also positioned AFWA as the diversity leader in accounting. Today, AFWA leads a newly formed consortium of groups that represent a spectrum of diversity in the profession. "MOVE propelled AFWA into the media by providing that necessary news hook," says AFWA executive director Lee Lowery. "It has permanently raised our profile."

THE BACKSTORY

The MOVE approach originated in the methodology of Wilson-Taylor Associates, Inc., and was developed in 1998 for *Working Woman* magazine's annual "Top 25 Companies for Executive Women" feature. Wilson-Taylor managed that project for six cycles, outliving *Working Woman*, which expired in August 2001. The company has now used the methodology for numerous projects, including industry-wide research that supports and measures the advancement of women in the cable television and transportation industries.



The story of how the MOVE methodology found the accounting industry is an example of how ingenuity trumps budget. In 2009, Wilson-Taylor detected an opportunity with the accounting profession, considering its chronic problems with retaining and advancing women. But given the size of the two groups (AFWA has 3,500 members, and AWSCPA has 1,000 members), neither association could simply write a check for \$65,000 (the baseline annual project cost)—never mind make the annual commitment required to build trend data. Still, a successful launch pivoted on the influence, moral authority, and reach of the two associations that represented women in accounting. AFWA's Lowery saw the possibilities immediately, and it

took only a couple of months to secure the association's role as an advisory and marketing partner. AWSCPA soon joined the effort, establishing the platform for sponsorship outreach.

Next came the sponsors. Accounting and consulting firm Moss Adams quickly realized that the MOVE Project aligned nicely with Forum_W, its internal programs to advance women. "The Accounting MOVE Project created new common ground and shows that sponsors can be creative partners," says Tricia Bencich, the Moss Adams human resources manager who oversees Forum_W. "Externally, we are seen as leaders, and internally, it builds our reputation that Forum_W is making progress. It's a presence, not just positioning."

Support from Moss Adams and another large accounting firm, BDO Seidman, underwrote the launch process, which involved customizing the template MOVE survey to reflect the culture and concerns of the accounting profession, as well as extensive outreach to encourage firms to participate. Firms pay an administrative fee starting at \$350, based on their size, to cover the cost of the survey and of phone interviews to gather insights from women and industry leaders. In exchange, they receive a benchmarking snapshot. In fact, the very first firm to join—Rothstein Kass—became a national sponsor the next year. (In 2012, 29 firms participated, up from 20 firms in 2010.)

The comprehensive research process returns a constellation of communications tools:

- Data that forms the basis for the annual "Best Firms for Women in Accounting" list.
- Social media content.
- Conference and chapter programs.
- Coverage in numerous publications that cover accounting, finance, and women in business.

"For the first time, the profession has access to information that enhances the networking and collaborative efforts of women CPAs across many segments of

KEY TAKEAWAYS

» Build several streams of communication deliverables into the project from the start. Often, research projects are "owned" by a foundation or education offshoot of the primary association; yet, a comprehensive thought leadership project will amplify return by also yielding material for social media, ongoing profiles, best-practice case studies, chapter programs, and media interview talking points for staff, boards, and chapter leaders.

» A brand-new project or major realignment of an ongoing project creates a fresh opportunity to recruit sponsors on new terms. Sponsors might be more enthusiastic about joining a project that they can help shape, rather than simply add their names to a long-running project that already has well-established "owners."

» Frame out the project's goals and approach sponsors to see how they view their support aligning with those goals. The Accounting MOVE Project won credibility and major sponsorship from fast-growing regional accounting firms that want to be known for innovation. Now, those firms are regularly quoted in industry media as proponents of new ideas that work.

» Prestigious, high-profile founding sponsors not only bring in seed capital, but also win credibility and participation buy-in from others in the profession. "It gives instant credibility, and gives people the confidence that there is someone behind it that they know and trust," says Andrea Ballard, a human resources consultant to the accounting profession.



the industry," says Kim Fantaci, executive director of AWSCPA.

A MEMBER MAGNET

From the start, the project caught the attention of women and leaders in the profession—including longtime AFWA and AWSCPA members. The input of both sponsors and association leaders resulted in data that "addresses areas that have been problems for CPA firms and other employers of CPAs for years," says Jeanne H. Yamamura, a CPA and consultant and AFWA member.

The project also helped draw potential new customers and members to the asso-

ciations. For example, Sue Zisko, director of marketing for NSBN, heard about the data from her firm's partners. Her first response was to compare her firm's data to the national averages outlined in the MOVE report. She then started looking into AFWA and AWSCPA programs that might help her firm with professional development.

As a seasoned accounting human resource manager, Andrea Ballard says that the associations' joint research project filled in "that missing piece" that the profession needs to adopt practices that will finally retain women to partnership. Her prior perception of AFWA and AWSCPA, she says, was that their local chapters ran programs that may or may not have been relevant to firms. "Then you see this, and it's got that strong, solid research foundation. And, it's specific to the industry. Firm partners don't want to hear how Google is keeping women around," she says, referring to the ubiquitous best-places-to-work lists that often are thinly disguised marketing programs. "They want to hear how public accounting firms are keeping women around."

Now entering its fourth cycle, the Accounting MOVE Project is on track to have 40 participating firms in 2013, double the number of the first year. And, thanks to a new partnership, the report will be published in spring 2013 as the *Public Accounting Report's* annual special section on women. Because *Public Accounting Report* (one of the profession's largest-circulation publications) does not take advertising, affiliation with the MOVE Project special section is a rare opportunity for the associations and sponsors to be showcased in front of leading firm partners, clients, and suppliers.

"In today's environment, serving members means something different, and that differentiation has come from the data and the experiences depicted in the case studies and discussions," says AWSCPA's President Amy Knowles-Jones, an internal audit manager with Oxford Industries, Inc. "The project has enabled AWSCPA to retool and brand the benefits women CPAs need most."

"More than anything, this has helped us find our focus," says AFWA's Lee Lowery. "For years, we just plugged along maintaining the status quo with our existing members. Now, we have redefined our purpose, and as a result, we are more visible to and attracting more people outside of our organization." ■



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