



Minnesota Society of CPAs Strategic Framework

2025-2028

Created December 2024

Updated December 2025

Mission

To elevate member's impact by fostering integrity, professional growth and connection while advocating for the profession.

Vision

The MNCPA will reverse the pipeline challenge while engaging and serving members for shaping the future of the CPA profession

Values

Integrity	Service	Excellence	Innovation	Stewardship	Inclusiveness
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Trends Shifting the Accounting Profession

Talent and pipeline shortage: Fewer CPAs, generational shifts and decline in small firms.	Technological advancements and the rise of AI: Transforming the accounting profession
Private equity & mergers: Impact on CPA firms and industry dynamics	Complexity of standards and regulations: Increasing demands on CPA skills and quality

Strategic Drivers

Provide relevant products, services and opportunities for building community to engage and drive membership.	Position advocacy activities as high value and increase visibility to drive increased membership and engagement.
Provide a breadth of learning opportunities for accounting and related professions.	Promote the value of the CPA credential in colleges and high schools to drive more students to earn the CPA credential.

STRATEGIC DASHBOARD

Green = in progress

Blue = completed

Yellow = at risk

Red = off track

No color = not started

Dates in parentheses indicate when the status was added to the report.

1	Provide relevant products, services and opportunities for building community to drive membership.			
	INITIATIVES	OUTCOMES	DELIVERABLES	2026 -27 STATUS
1.1	Provide comprehensive MN specific resources/content that support accounting professionals working in MN.	Greater number of members accessing MN specific resources.	Enhance resources related to starting a new public accounting firm in Minnesota.	
1.2	Leverage website content using a digital first strategy to provide member value.	Improved website user experience.	Reorganize website content.	
			Improve navigation and search functions.	
			CMS update to new code base	
			Develop a more strategic paywall structure.	
1.3	Develop or package products and services targeted at high-risk non-renewal member audiences and potential members.	• Higher retention of at-risk members (B&I, YP, mid-career) • Increased number of new members.	Create products and services for members switching to B&I.	
1.4	Pilot projects focused on creating meaningful member connections.	Elevated quality and increased frequency of member interactions.	Pilot a mentoring program and develop resources for mentees and mentors.	
1.5	Expand access to experts and innovative business solutions.	Positioned MNCPA as a reputable source for connecting members to business solution providers.		

2	Provide a breadth of learning opportunities for accounting and related professions.			
	INITIATIVES	OUTCOMES	DELIVERABLES	2026 -27 STATUS
2.1	Enhance customer search and purchase experience.	Increased average CPE credits purchased per customer.	Add recommendations to CPE catalog.	
			Add saved CPE list.	
2.2	Improve customer learning and event experiences.	• More repeat customer purchases. • Favorable attendee feedback on implemented improvements.	Develop new in person learning experiences that include meaningful interaction.	
2.3	Offer a mix of new learning programs and content.	• Reduced reliance on a small set of vendors. • Increased sales and new customers.	Create and implement a strategy to produce Minnesota specific educational content.	
			Contract with at least one new vendor using innovative approaches to educational design.	
2.4	Structure MNCPA-developed conferences to maximize revenue while maintaining event quality.	Improved financial outcomes.	Evaluate formats, days, fees and credits.	

3	Position advocacy activities as high value and increase visibility to drive increased membership and engagement.			
	INITIATIVES	OUTCOMES	DELIVERABLES	2026 -27 STATUS
3.1	Support members in connecting with legislators outside of CPA lobby day.	Stronger relationships between members and legislators.	Implement initiatives to engage members with newly elected legislators.	
			Increase member outreach to key legislative leaders.	
3.2	Address existing Minnesota Board of Accountancy rules that negatively impact the profession.	Minnesota BOA rules that are more aligned with the professional environment.	Collaborate with Board of Accountancy to revise statutes and create rules package with desired changes.	
3.3	Launch government relations activities targeted to young professionals.	More young professionals involved in government relations.	Initiate a social media campaign to communicate the value and impact of being involved in government relations.	
			Develop opportunities for key MNCPA members to connect with young professionals.	

4	Promote the value of the CPA credential in colleges and high schools to drive more students to earn the CPA credential.			
	INITIATIVES	OUTCOMES	DELIVERABLES	2026 -27 STATUS
4.1	Raise awareness of the accounting profession as a top tier choice among high school students.	Expanded connections with high school students and educators to generate enthusiasm for the accounting profession.	Establish a student outreach committee.	
			Create more engagement opportunities for members to inspire students to become CPAs.	
			Develop a strategic partnership that supports firms in launching high school internships.	
4.2	Position the CPA credential as a significant advantage in career success.	Increased awareness and support for earning the CPA credential with 2 and 4-year college students.	Provide intro to accounting presentations at three additional 4-year colleges.	
			Provide CPA licensure presentations to interns at three additional public accounting firms.	
			Establish relationships with two community colleges to promote accounting careers.	
4.3	Elevate awareness of the MNCPA as a premier professional network for aspiring accountants.	Growth in student membership and engagement.	Increase number of college ambassadors by 25%.	
			Create new opportunities for students to connect with the MNCPA.	