



# Minnesota Society of CPAs Strategic Framework

2025-2028

Approved by MNCPA Board on 02/20/2025

## 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

Provide relevant products, services and opportunities for building community to drive membership.			
INITIATIVES	OUTCOMES	DELIVERABLES	STATUS
Provide comprehensive <b>MN specific</b> resources/content that support accounting professionals working in MN.	Greater number of members accessing MN specific resources.	<ul style="list-style-type: none"> <li>• Replace HR hotline provider.</li> <li>• Enhance resources related to starting a new public accounting firm in Minnesota.</li> </ul>	
Leverage website content using a digital first strategy to provide member value.	Improved website user experience.	<ul style="list-style-type: none"> <li>• Reorganize website content.</li> <li>• Improve navigation and search functions.</li> <li>• Develop a more strategic paywall structure.</li> </ul>	
Develop or package products and services targeted at high-risk non-renewal member audiences and potential members.	<ul style="list-style-type: none"> <li>• Higher retention of at-risk members (B&amp;I, YP, mid-career)</li> <li>• Increased number of new members.</li> </ul>	<ul style="list-style-type: none"> <li>• Add additional networking partners at YP events.</li> <li>• Create on-demand product for members switching to B&amp;I.</li> <li>• Launch mid-day mingle events designed for mid-career professionals.</li> </ul>	
Pilot projects focused on creating meaningful member connections.	Elevated quality and increased frequency of member interactions.	<ul style="list-style-type: none"> <li>• Pilot a mentoring program and develop resources for mentees and mentors.</li> <li>• Establish an MNCPA book club.</li> </ul>	
Expand access to experts and innovative business solutions.	Positioned MNCPA as a reputable source for connecting members to business solution providers.	<ul style="list-style-type: none"> <li>• Collaborate with state societies to provide a broader market for sponsors.</li> <li>• Establish a digital hub to provide members with access to business solutions.</li> </ul>	

**Provide a breadth of learning opportunities for accounting and related professions.**

INITIATIVES	OUTCOMES	DELIVERABLES	STATUS
Enhance customer search and purchase experience.	Increased average CPE credits purchased per customer.	<ul style="list-style-type: none"> <li>• Add recommendations to CPE catalog.</li> <li>• Add saved CPE list.</li> <li>• Evaluate AI for online customer service.</li> </ul>	
Improve customer learning and event experiences.	<ul style="list-style-type: none"> <li>• More repeat customer purchases.</li> <li>• Favorable attendee feedback on implemented improvements.</li> </ul>	<ul style="list-style-type: none"> <li>• Replace online conference platform.</li> <li>• Enhance the in-person experience with engaging elements.</li> </ul>	
Offer a mix of new learning programs and content.	<ul style="list-style-type: none"> <li>• Reduced reliance on a small set of vendors.</li> <li>• Increased sales and new customers.</li> </ul>	<ul style="list-style-type: none"> <li>• Establish new vendor relationship for Federal Tax Updates.</li> <li>• Search for vendors that design engaging on-demand programs.</li> </ul>	
Structure MNCPA-developed conferences to maximize revenue while maintaining event quality.	Improved financial outcomes.	<ul style="list-style-type: none"> <li>• Evaluate event fees.</li> <li>• Evaluate formats, days and credits.</li> </ul>	

**Position advocacy activities as high value and increase visibility to drive increased membership and engagement.**

INITIATIVES	OUTCOMES	DELIVERABLES	STATUS
Advocate for modernizing the requirements for CPA licensure.	Broadened pathway to licensure while minimizing impacts to mobility.	<ul style="list-style-type: none"> <li>• Pass legislation to broaden the CPA pathway.</li> <li>• Pass automatic mobility legislation.</li> <li>• Support members in complying with mobility during a disruption.</li> </ul>	

		<ul style="list-style-type: none"> <li>• Communicate licensure changes to candidates, students and members.</li> </ul>	
Support members in connecting with legislators outside of CPA lobby day.	Stronger relationships between members and legislators.	Develop legislator event template and facilitate firm meetings with legislators.	
Address existing Minnesota Board of Accountancy rules that negatively impact the profession.	Minnesota BOA rules that are more aligned with the professional environment.	<ul style="list-style-type: none"> <li>• Seek a commitment from the BOA to make identified rule changes.</li> <li>• Initiate rule change efforts which is an 18 – 24 month process.</li> </ul>	
Launch government relations activities targeted to young professionals.	More young professionals involved in government relations.	<ul style="list-style-type: none"> <li>• Initiate a social media campaign to communicate the value and impact of being involved in government relations.</li> <li>• Develop opportunities for key MNCPA members to connect with young professionals.</li> </ul>	

**Promote the value of the CPA credential in colleges and high schools to drive more students to earn the CPA credential.**

INITIATIVES	OUTCOMES	DELIVERABLES	STATUS
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.	<ul style="list-style-type: none"> <li>• Establish a student outreach committee.</li> <li>• Create more engagement opportunities for members to inspire students to become CPAs.</li> <li>• Collaborate with other organizations to support high school internships.</li> </ul>	

		<ul style="list-style-type: none"> <li>• Reimagine resources that are used to promote the profession's impact and potential.</li> </ul>	
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.	<ul style="list-style-type: none"> <li>• Grow the number of presentations at intro accounting college classes.</li> <li>• Increase presentations to public accounting firm interns.</li> <li>• Enhance the impact of college road show presentations through member-led presentations.</li> </ul>	
Elevate awareness of the MNCPA as a premier professional network for aspiring accountants.	<ul style="list-style-type: none"> <li>• Growth in student membership and engagement.</li> </ul>	<ul style="list-style-type: none"> <li>• Recruit more college ambassadors.</li> <li>• Expand the MNCPA presence on college campuses.</li> </ul>	