



## ACCOUNTING ADVISORY MEETING

DATE: Friday, May 10, 2019

TIME: 11:30 AM TO 2:00 PM

LOCATION: Hospitality Management Room C

<b>ATTENDEES:</b>	<p><i>Amy Dickinson</i> – Mission College, Accounting Student  <i>Art Ardizzone</i> – Palo Alto Networks &amp; Adjunct Instructor  <i>Betty Christopher</i> – Mission College, Accounting Instructor  <i>Chris Davis</i> – PwC, Global Mobility / Digital Accelerator Manager  <i>Chris Zilg</i> – Mission College, Business Instructor  <i>Gelena Shvetsova</i> – Mission College, Accounting Student  <i>Greg Mostyn</i> – Mission College, Adjunct Instructor &amp; Retired Full-Time Instructor  <i>Howard Randall</i> – Mission College, Retired CFO &amp; Adjunct Instructor  <i>Jack Borok</i> – TaxesInYourHome.com, Enrolled Agent/Tax Consultant  <i>Jeff Pallin</i> – Mission College, Dean of Business, Technology &amp; Kinesiology  <i>Jennifer Tseng</i> – Mission College, Accounting Instructor  <i>Lakshmi Venkata</i> - Mission College and De Anza College, Adjunct Instructor  <i>Martin Donnelly</i> – Hitachi Vantura, Project Manager  <i>Regine Staufenberg</i> – CalCPA, Program Associate for the S. V. San Jose Chapter  <i>Sheau-Yi Liu</i> – Lumentum, Accounting Consultant  <i>Teresa Thompson</i> – Mission College, Accounting Chair  <i>Theresa Tran</i> – Mission College, EOPS Counselor</p>		
<b>AGENDA ITEMS</b>			
<b>TIME</b>	<b>TOPIC</b>	<b>PRESENTER</b>	
11:30 AM – 12:00 PM	Lunch		
12:00 PM – 12:15 PM	<b>1. Mission College and Brief Introduction</b>	Jenny Tseng, Everyone	
12:15 PM – 12:45 PM	<b>2. Department Updates</b>		
	2.1 The Bay Area Acctg Ecosystem and Mission College	Jeff Pallin	
	2.2 VITA Program and Open Educational Resources (OER)	Teresa Thompson	
	2.3 SAP Update	Jenny Tseng	
	2.4 QuickBooks Desktop	Howard Randall	
	2.5 Accounting Trends in Colleges	Lakshmi Venkata	
12:45 PM – 1:45 PM	<b>3. Industry Outlook</b>		
	3.1 Automation and Technology in Accounting	Chris Davis	
	3.2 Job Trends in Accounting	Vanessa Martinez	
	3.3 Employers' Expectations of New Hires	Martin Donnelly	
	3.4 The CalCPA Program	Regine Staufenberg	
1:45 PM – 2:00 PM	<b>4. Questions and Closing</b>	Everyone	

<p><b>DEPARTMENT UPDATES 2.1:</b>  <b>BAY AREA ACCTG ECOSYSTEM</b>  <b>&amp; MISSION COLLEGE</b></p>	<p><b>Discussion Summary Jeff Palin:</b></p> <ol style="list-style-type: none"> <li><b>1</b> The main goals of Mission College: <ul style="list-style-type: none"> <li>• to prepare students for their future careers –help them choose program and move through the program,</li> <li>• to help them transfer to university.</li> </ul> </li> <li><b>2</b> To succeed we need to know the needs of the industry.</li> </ol>
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	<p><b>3. Prepare for jobs and transfers</b>          Mission College - Mission workforce of economic development          Guided Pathways – be more intentional – accelerate program          Student success – degree/certificate completion in timely manner          Funding is based on student success not just head count</p>
<p><b>DEPARTMENT UPDATES 2.2:          VITA PROGRAM &amp; OPEN          EDUCATION RESOURCES (OER)</b></p>	<p><b><u>Discussion Summary Teresa Thompson:</u></b></p> <p><b>1</b> VITA Program - this is the opportunity for students to practice before going to their career. Students take 2 courses – Individual tax law class starts Fall semester and the tax lab class is offered in Spring.          2 options to engage students:</p> <ul style="list-style-type: none"> <li>• More advertisement of the program,</li> <li>• Returning students.</li> </ul> <p>Volunteer Income Tax Assist (VITA Program) has had lower than anticipated enrollment rate due to TCJA. This is the 3<sup>rd</sup> year of the program          For the third year, 38% of clients returned (up from 18% the year before).          In Fall, started using OpenSource for Acct 1A class which is an open educational resources that offers no cost textbooks –          United Way is offering the program to help w/ financial freedom &amp; knowledge for students to have better online material.          Professor Thompson is committed to using OpenSource for all future classes          OpenSource generates higher enrollment by offering \$0 textbooks  <b>VITA Goals</b></p> <ul style="list-style-type: none"> <li>• Goal #1 students shall continue to be in compliance with the IRS' Volunteer Standards of Conduct</li> <li>• Goal #2 Obtain a less than 5% rejection rate of electronically transmissions that are not accepted by the IRS or Franchise Tax Board</li> <li>• Goal #3 Enroll more students in ACC 053B &amp; C</li> <li>• Goal #4 Grow VITA program by serving more specialty areas such as foreign students &amp; military members</li> <li>• Goal #5 Offer more services for taxpayers</li> <li>• Goal #6 Collaborate more with student services</li> </ul> <p><b>2</b> Open Educational Resources:</p> <ul style="list-style-type: none"> <li>• Financial Accounting 1A class with Zero – text book (free).              The goal – 1B Managerial Accounting with Zero – text book.              Matching previous versions of the text books for the students. That is cheaper for the students to rent or buy a previous version. But it is hard for the instructors to match books to all accounting classes.</li> </ul> <p><b><u>Action Items:</u></b>          VITA needs more student volunteers so a 2<sup>nd</sup> section on Thurs/Fri morning will be added          VITA wants to offer more services for taxpayers          Wants to look into offering a “general financial” class          Working on Acct 1B to have an all-digital textbook          Advertise ACC 053B &amp; C in other accounting classes, with counselors, or with the help of the marketing dept.</p>



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	<p>Work with Veterans Center (VALOR), Foreign Student Center, and CalWorks to inform them of the VITA program and how it can help members</p>
<p><b>DEPARTMENT UPDATES 2.3:</b> <b>SAP UPDATE</b></p>	<p><b><u>Discussion Summary Jenny Tseng:</u></b>          Almost 2 years ago Mission College joined University Alliance          SAP gives license and school pays a nominal fee annually to Cal State          The AIS class consists of online theory book/SAP/ERP online educational resource          SAP will offer students a recognition award to students who complete 3 SAP classes          Business analytics is really growing – good program at SJSU</p> <p><b><u>Action Items:</u></b>          Next semester Chris will offer predictive analytics with SAP which will have 2 textbooks (theory/practical)          A new class is developing – Cloud Computing and Analytics in Accounting. The course will include theory and practice parts, KPI and reports. It is an advanced course. It needs to be promoted to have the right prospective students. The sources (the last two need to be checked):</p> <ul style="list-style-type: none"> <li>• Current students,</li> <li>• Small businesses,</li> <li>• Oracle clients.</li> </ul> <p>SAP needs more enrollment (a lot of students drop because they are working full-time)          Need to develop new avenues to promote SAP classes – maybe offer SAP in summer, implement w/ other companies</p>
<p><b>DEPARTMENT UPDATES 2.4:</b> <b>QUICKBOOKS DESKTOP</b></p>	<p><b><u>Discussion Summary Howard Randall:</u></b>          What version of QB should Mission teach – Cloud or Desktop          QB has 6 million users (3.4 are online users, 2.6 are desktop users)          IData did a study on business market which showed that QB has 55%, ADP 10%, Sage 50 6%, Peachtree &amp; others shared the rest          In 2015 QB announced they would stop supporting desktop, but users got so upset, the company changed their mind          QB has changed so much that the class of 2017 had to spend 15 minutes per class focusing on updates and changes instead of learning content          SJSU students are coming to Mission College to take the QB classes as it is NOT offered there</p> <p><b><u>Action Items:</u></b>          Mission College thinks that both versions of QB should be taught – online &amp; desktop          The cloud version of QB would be best for in-class instruction          The desktop version of QB would be best for online only class instruction where it is installed on a home computer          Mission should look for new avenues to recruit SJSU students</p>



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<p><b>DEPARTMENT UPDATES 2.5:</b> <b>ACCOUNTING TRENDS IN COLLEGES</b></p>	<p><b><u>Discussion Summary Lakshmi Venkata:</u></b> De Anza only offers online/hybrid classes as of winter 2019 The class times have been reduced to increase enrollment (traffic issues, etc.) They are no longer offering 4hr straight session on weekdays, instead 1.25-2.25 hour long classes with additional online components De Anza also changed class start times - getting lots of enrollment esp. high school students at 4:45 start time classes There are almost no face-to-face classes in De Anza College – the majority classes are online and hybrid. Course work is designed as chapters learning, homework, and discussions. 2-hour classes align with the schools nearby in order to get high schools students (starts at 3:30 p.m.- 4:00 p.m.) Honors coursework for high school students is offered where they give HS students projects to gain in-depth knowledge of accounting – getting a lot of HS student enrollment at 3:30-4:00pm start times</p>
<p><b>INDUSTRY OUTLOOK 3.1:</b> <b>AUTOMATION &amp; TECHNOLOGY IN ACCTG</b></p>	<p><b><u>Discussion Summary Chris Davis:</u></b> Tax Manager at PwC turned to Digital Accelerator Builds automations for client service team – automate processes with visualization Not just using software – coding and building Key characteristics for hiring - Looking for students who can learn and show other employees what they learned – shared learning Apps – learning bursts, digital badges (started about a year ago), HQ Internal app Tech enabled audit is currently being used, but AI is still a few years away Currently using natural language processing for template response  Main points - digital accelerator, automotive processes, scale what works. Finding students and teaching them - PWC needs to understand, how they learn and what they want. Ways of teaching – digital fitness Apps, digital accelerator, Power Up!, Trivia.  Visualization is very impactful in order to absorb information, visualize, and match it.  <b><u>Action Items:</u></b> Coursework should implement current business problems into material  <b><u>Key Skills</u></b>  <ol style="list-style-type: none"> <li>1. Essential 8 Tech</li> <li>2. Data Wrangling</li> <li>3. Extract, transform, load, automate</li> <li>4. Visualizations / Dashboards</li> <li>5. VBA &amp; Basic Coding</li> <li>6. Process Mapping – VIZIO</li> </ol> </p>



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<p><b>INDUSTRY OUTLOOK 3.2:</b> <b>JOB TRENDS IN ACCTG</b></p>	<p><b><u>Discussion Summary Vanessa Martinez:</u></b> *Not discussed</p>
<p><b>INDUSTRY OUTLOOK 3.3:</b> <b>EMPLOYERS' EXPECTATIONS OF NEW HIRES</b></p>	<p><b><u>Discussion Summary Martin Donnelly:</u></b> Need to teach in a very broad spectrum Used to hire a lot of interns at Cisco Need to be careful with interns and treat them nicely, but sometimes interns oversell themselves Mission College has a staff member to facilitate internships, but the biggest problem is finding companies Colleges need to help students to be aware and be ready for the challenging goals in their work in industry.</p> <p><b><u>Action Items:</u></b> Look at alumni for interns</p>
<p><b>INDUSTRY OUTLOOK 3.4:</b> <b>THE CALCPA PROGRAM</b></p>	<p><b><u>Discussion Summary Regine Staufenberg:</u></b> CAL CPA is a membership organization to support CPA's in current professions Trend in industry – younger groups not as interested in joining Expanded network to include financial professionals and not just CPA's Joining is a great way to network and is free to students Estate planning event will be in the beginning of June Networking events held every 6 months Student support programs offered, scholarship opportunities, and "book bucks" which are \$300 gift cards (must have A or B grades to apply) \$42,000 given out last year in scholarships and "book bucks" Students with no-cost textbooks were unsure if they could apply for "book bucks" Campus Ambassador program reaches out to 4 yr. university student to help organize events and teach others about becoming a CPA</p> <ol style="list-style-type: none"> <li>1. There are 14 chapters in California. The goals are: <ul style="list-style-type: none"> <li>• Supporting professionals,</li> <li>• Supporting in learning through CPA,</li> <li>• Networking events.</li> </ul> </li> <li>2. Support for the students (free membership, scholarships for text books for some classes, scholarships for bachelor programs, opportunities to network with professionals)</li> <li>3. Campus ambassador program (for universities): <ul style="list-style-type: none"> <li>• 41 ambassadors in California – students who are focused on the career,</li> <li>• identifying students who are able to be an ambassador,</li> <li>• To organize events about becoming CPA,</li> <li>• To get people aware of the program and to enter into it,</li> </ul> </li> </ol> <p>The main problem – CPA is perceived as a distant goal by students. The purpose of an ambassador is to persuade students to start with the CalCPA Program and explain how it can open a career. Regina is ready to discuss the possibility to establish an ambassador position in Mission College, if somebody is interested.</p>



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	<p><b>Action Items:</b> Change the name "book bucks" to another name so it doesn't imply books need to be purchased with the funds Wants to help high school students w/ program about financial literacy Continue Campus Ambassador program, but look into branching out to 2 year college students</p>
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<p><b>QUESTIONS &amp; CLOSING:</b> RAN OUT OF TIME</p>	
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