

Incoming TSCPA Executive Director/CEO Says 'Our Commitment is Serving our Members'



“The final test of a leader is that he leaves behind him in others the conviction and will to carry on.”

— Walter J. Lippmann

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By Anne McDonald Davis

As the Texas Society of CPAs ushers in 2017, longtime Executive Director/CEO **John Sharbaugh**, CAE, retires and incoming Executive Director/CEO **Jodi Ann Ray**, CCE, IOM, looks forward to her role in the Society's continuing success. The two worked together throughout last fall to coordinate a smooth transition. Here's what Ray had to share about her career, family and life experiences, and what she sees ahead.

Q: You most recently were vice president of membership and volunteer experience at Meeting Professionals International (MPI), where you were responsible for governance and community development. Prior to joining MPI, you served as the CEO for chambers of commerce in Connecticut, North Carolina and Texas. How did you choose a career in association and chamber of commerce management?

A: I originally went to school for psychology and had gotten involved with the local Chamber of Commerce, the Greater Valley Chamber of Commerce in Shelton, Connecticut. There I took a job on staff in membership, my first association job. And I've stayed ever since.

Q: So that was a fit for you?

A: I just loved it and decided that's what I was going to do and how I would pursue my career.

Q: From Connecticut to North Carolina to Texas – that's a pretty interesting cross-section of the United States.

A: Well, what's been nice about it is I've gotten to work in three very distinct regions of the country and have really enjoyed experiencing the cultural differences, the different approaches to business. Spending 10 years in North Carolina was actually a great transition from the northeast to Texas.

Q: What are some of those differences?

A: The politics are different. The approach to planning is different. The approach to infrastructure, the pace of life – even social conversation and interaction is different.

Q: Perhaps your early training in psychology came in handy there?

A: (*laughs*) It has been a beneficial background.

Q: Clearly. What other training or experience have you found helpful?

A: I went through a program called Institutes for Organization Management, which was a six-year certification program at the time (it's four years now). I did specific training in the areas where I really needed to focus – advocacy being one of those, economic development another.

Q: As you progressed in your career, what has been most rewarding to you? Did anything make you think twice about what you were doing?

A: (*smiles*) I think everyone has those days, but not really. There has always been a new challenge. What I love about this work is no two days are ever alike, and there are so many different areas I'm engaged in. It's always interesting and compelling.

Q: The dynamics of coordinating a full-time association staff with a large, passionate volunteer base can certainly be a challenge.

A: Absolutely. It's a unique part of association management work, but it's also, I would say, the most rewarding. Not only do we have a fabulous staff team of folks who are experts in their field and have been doing this for a really long time, but the dedication, passion and commitment of the volunteers; this is always what drives me. It's what made me come to TSCPA, when I heard from the search committee just how much this organization meant to them.

Q: The CPAs who have made TSCPA their home feel deeply about their involvement. Why do you think that is?

A: It's been an integral part of their lives for a lot of years. The amount of time that they give to this organization because they love it and want to give back to their profession is really amazing. We have folks who have volunteered for us for almost their entire professional lives.

Q: And many TSCPA volunteers don't just volunteer for TSCPA; they seem to volunteer in other areas – communities, schools, churches.

A: That's right. These are people who volunteer and serve, the kind of people you want to surround yourself with. It's been amazing to me coming to this profession, not having worked in it before, that every single person I've met has said, "Welcome and how can I help you?"

Q: So you're looking forward to getting involved here?

A: Yes. And the opportunity that the board and search committee gave me for this transition is great. How many times do you get to really have some quality time with your predecessor so that we can make sure we have everything covered the way it should be? It's best for the organization going forward and best for our members.

Q: What are the similarities between TSCPA and the organizations where you worked previously?

A: Most everything we do is similar, as are the challenges. How do we continue to provide the services that members need, which changes

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over time? How do we adapt to technology? Associations in general face all the same issues no matter what – the only difference is the specifics of a particular industry. The issues that we will work on legislatively, for example, will be specific to the accounting profession in Texas.

Q: What overall issues do you see facing TSCPA in the next several years?

A: Well, I think the landscape for associations has changed and we need to be changing with it, and looking at what are the new and emerging expectations of our members.

We're looking closely at the demographics of our membership and how that's changing. We have 28,000 members. The member value proposition for all those folks isn't going to be the same. The demographics are different. The areas of practice are different. So we really need to make sure that we're carving out unique value propositions for different types of members.

We also need to look at continuing professional education. That's an important benefit and value that we provide to our members, but how should it look in five or 10 years? And we must continue to find the best ways to share the brain trust among our members, the opportunity for interaction that is so valuable. I'm not sure that the traditional models we've always used for that networking will necessarily be the same going forward.

Q: Well, it's always been a challenge in Texas for members to have in-person, face-to-face interaction, because it's such a big state. People just don't get on a plane as often as they used to.

A: Absolutely. *(laughs)* Except I feel like I'm on a plane a lot.

Q: Back to legislative and governmental affairs, what are the priorities going to be?

A: Well, this should be an interesting year at the federal level for tax reform. The chairman of the House Ways and Means Committee has told us that they hope to have some form of tax reform on the floor by mid-2017. Then at the state level, we are continuing our efforts to

oppose any efforts to levy a sales tax on professional services. So far, there are no specific bills that we're aware of, but it's always a threat and something that we monitor closely.

We're also working to repeal the Texas exception to GASB Statement 45; hopefully, we'll be able to get that accomplished this session. And then there are a number of issues that would be better to hold off on until the Texas Public Accountancy Act undergoes sunset review, which is currently planned for 2019.

Q: What other types of activities are you involved in as a professional?

A: I wholeheartedly believe, not only professionally but personally, that you should be involved in industry associations. So I'm involved in ASAE (American Society of Association Executives). I will be involved in TSAE (Texas Society of Association Executives) and also the CPA SEA, which is the group for state society executives, because I think it's important to give back to your profession. You learn so much working with your colleagues that way.

Q: Tell us about your family and other interests. What are your activities when you're not working?

A: So I'm married. We have five children.

Q: Goodness.

A: *(laughs)* So if I'm not working, I'm usually going to a tumbling practice or a band lesson or a sporting event.

Q: What's the age range?

A: It's 10 to 17. So we have a senior this year – that's a whole new experience.

Q: Your husband is a CPA, yes?

A: I think during the search process, during one of the interviews, we had talked about my husband being a CPA and someone said, "Well, bless your heart." *(laughs)*

Q: That can mean one of two things in Texas, but I think they meant the good thing *(laughs)*. What else would you like to make sure we say to members?

A: I want everyone to know I recognize that TSCPA has a long tradition of service to our members and to the profession. Obviously, we're over 100 years old! So moving forward for me, it's most important to carry on that tradition, but also to look towards those opportunities to move us into the future. So first and foremost, our commitment will always be to serving our members and upholding the value of the profession.

Again, what that might look like in the future may change. We want to be able to help our members adapt to those changes so they can be the most successful. I know that our board and our entire team is 100 percent committed to members in everything we do. ■

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