



THE PIPELINE
PROJECT VISION

Develop a ...

**profession-wide
and profession funded**

effort that increases the number of
underrepresented minorities entering
the accounting profession.

Major Initiatives of the Pipeline Project

Increase communication and awareness in diverse communities



- Research student and professional influences
- Develop and launch communication and awareness plan and campaign
- Leveraging educators and career counselors to inform students
- Placing accountants in classrooms

Increase support of school based programs for students pursuing accounting



- Evaluate, redesign, pilot, and launch school based summer programs (ACAP, ASDP, ASLW)
- Increase scholarships
- Expand presence in National Academy Foundation Academy of Finance
- Expand relationship with Junior Achievement to incorporate Accounting into their toolkits
- Ensure clear community college transfer into 4 year universities

Increase the number of underrepresented minorities who sit and pass the CPA exam



- Strengthen HBCUs/HSIs/Tribal Colleges to better prepare students to take the CPA exam
- Develop best practices on how to support underrepresented minorities pursuing their CPA
- Master's conference to encourage undergraduate students to go into a Masters of Accounting program



Key Performance Indicators

- Changing perceptions of the CPA among young students and their influencers
- Increase in presentations and exposure at various influencer focused event
- Increasing the number of accountants who participate in classrooms



Key Performance Indicators

- Growth in perceptions and attitudes pre- and post-program experience
- Increase quantity of scholarship recipients
- Career cluster website analytics and growth



Key Performance Indicators

- Increase in the quantity of underrepresented minorities sitting for the exam
- Increase in the quantity of underrepresented minorities passing the exam
- Increase in the quantity of underrepresented minorities attending programs/conferences/preparation and an increase their perceptions and satisfaction with each

Communication and Awareness

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National Diverse Pipeline Campaign Overview

- Agency Selected: Footsteps Group
 - 15-year history of multicultural marketing
 - Headquartered in New York
 - Clients: Lowes, Nissan, Visa
 - Approach: Culture in Motion








FOOTSTEPS




National Diverse Pipeline Campaign Overview

Elevate the CPA profession as an exciting career option. Drive diverse students to pursue an accounting career and diverse CPA candidates to sit for the exam.



Objectives

-  **Objective:** Attract and retain diverse talent to the accounting and CPA profession
-  **Objective:** Build a vibrant community of advocates among student influencers and stakeholder partners
-  **Objective:** Position the CPA profession as one that is highly-respected, vibrant, fascinating and opens up limitless possibilities
-  **Objective:** Emphasize the benefits of the CPA profession
-  **Objective:** Maintain and enhance the CPA's highly-regarded brand

Target Audience

-  **Audience:** High School Students and Influencers
-  **Audience:** Community and University College Students and Influencers
-  **Audience:** Strategic Partners

Target Actions

-  **Action:** Visit startheregoplaces.com and register
-  **Action:** Visit thiswaytocpa.com and become a student member

National Diversity Pipeline Campaign Development

“Real CPAs”



I'm the power behind the throne.

Ernesto Lopez CPA since 2009.

THIS WAY? CPA

Accounting. It's not what you expect. When you become a CPA, your career choices are endless. You could manage the budget of a top-line sports team, fight climate change, or lead your community team to become financially savvy. And that's just the tip of the iceberg. Learn more about the profession when careers of all backgrounds are present and accounted for.

Learn more and get your free membership at ThisWaytoCPA.com/RealCPAs

Powered by AICPA



What exactly does an accountant look like?

-Taji Watker, CPA since 2002-

THIS WAY? CPA

Accounting. It's not what you expect. Sure, as a CPA, it's a data-driven profession where you'll solve. That's my day job. But, I also host a weekly money management radio show with thousands of listeners, travel the world and teach financial literacy workshops to strengthen my community. Want to see if you fit in with my tribe of dynamic, hard-working individuals with a passion for giving back?

Visit ThisWaytoCPA.com/RealCPAs to learn more!

Powered by AICPA



It was the prospect of clocking dollars. Lol.

Azanfa Colon, CPA since 2005.

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School Based Programs

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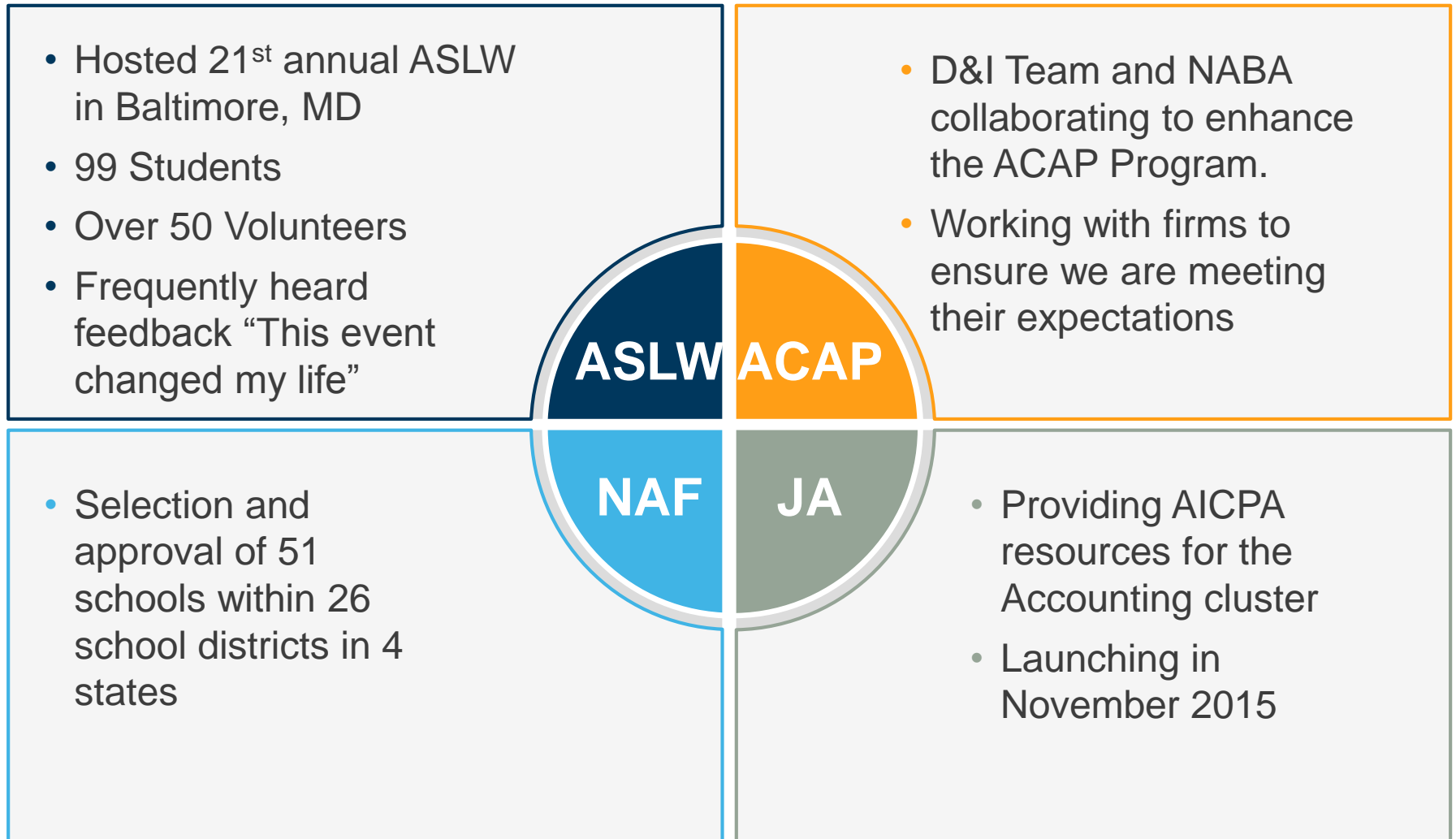
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Key School Based Program



Accounting Scholars Leadership Workshop

- Accounting Scholars Leadership Workshop “ASLW” is an annual program for minority accounting students
- Deadline to apply: March 15
- Event occurs every summer
- Program benefits:
 - Increased confidence
 - Sharpened communication skills
 - Gain strategies for enhancing your professional success

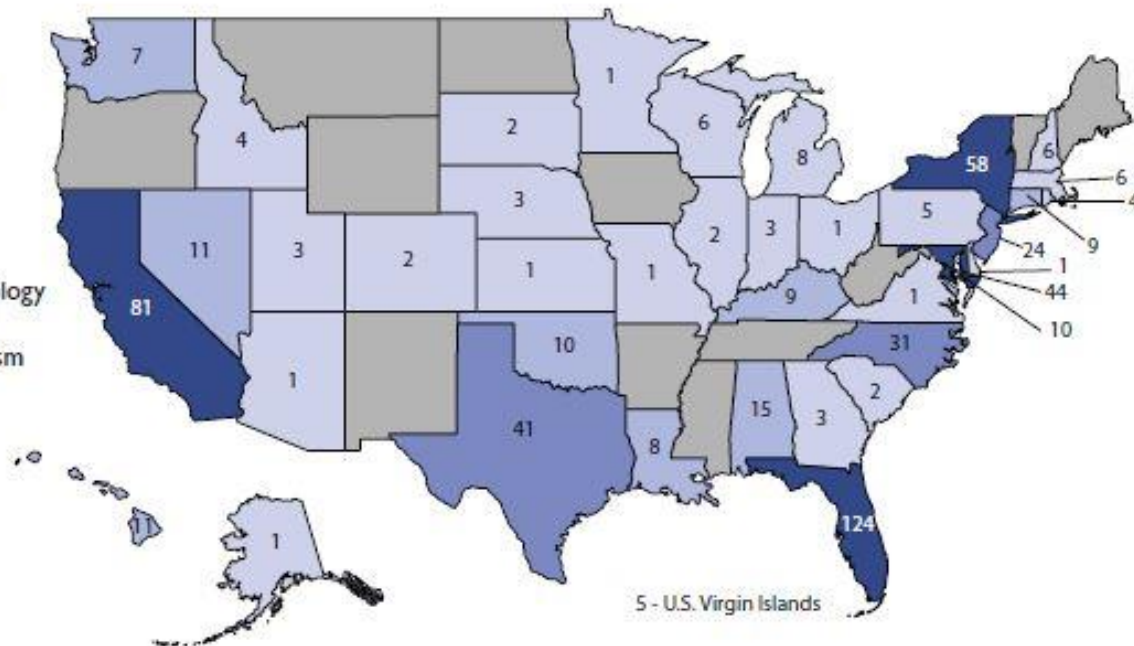


National Academy Foundation Network

NETWORK

565 academies

38% Finance
 19% Information Technology
 17% Engineering
 16% Hospitality & Tourism
 9% Health Sciences



38 states
 : DC and the
 : US Virgin Islands

highest concentration
 of academies

22% Florida
 14% California
 10% New York
 8% Maryland
 7% Texas

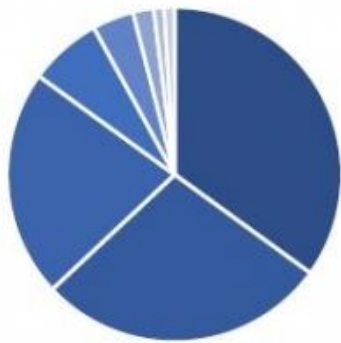
177 districts

highest concentration
 of academies

9% Miami-Dade
 5% New York City
 5% Dallas
 3% Broward County
 3% Collier County

NAF Students and Outcomes

STUDENTS



70,259 students
+13% from last year
:
35% Hispanic/Latino
28% Black/African American
22% White
7% Asian
4% Unreported
2% Other/Multi-Racial
1% Pacific Islander
1% Native American/Alaska Native

61% of students qualify for free and reduced price lunch

14% are English Language Learners

OUTCOMES



96% of seniors graduated



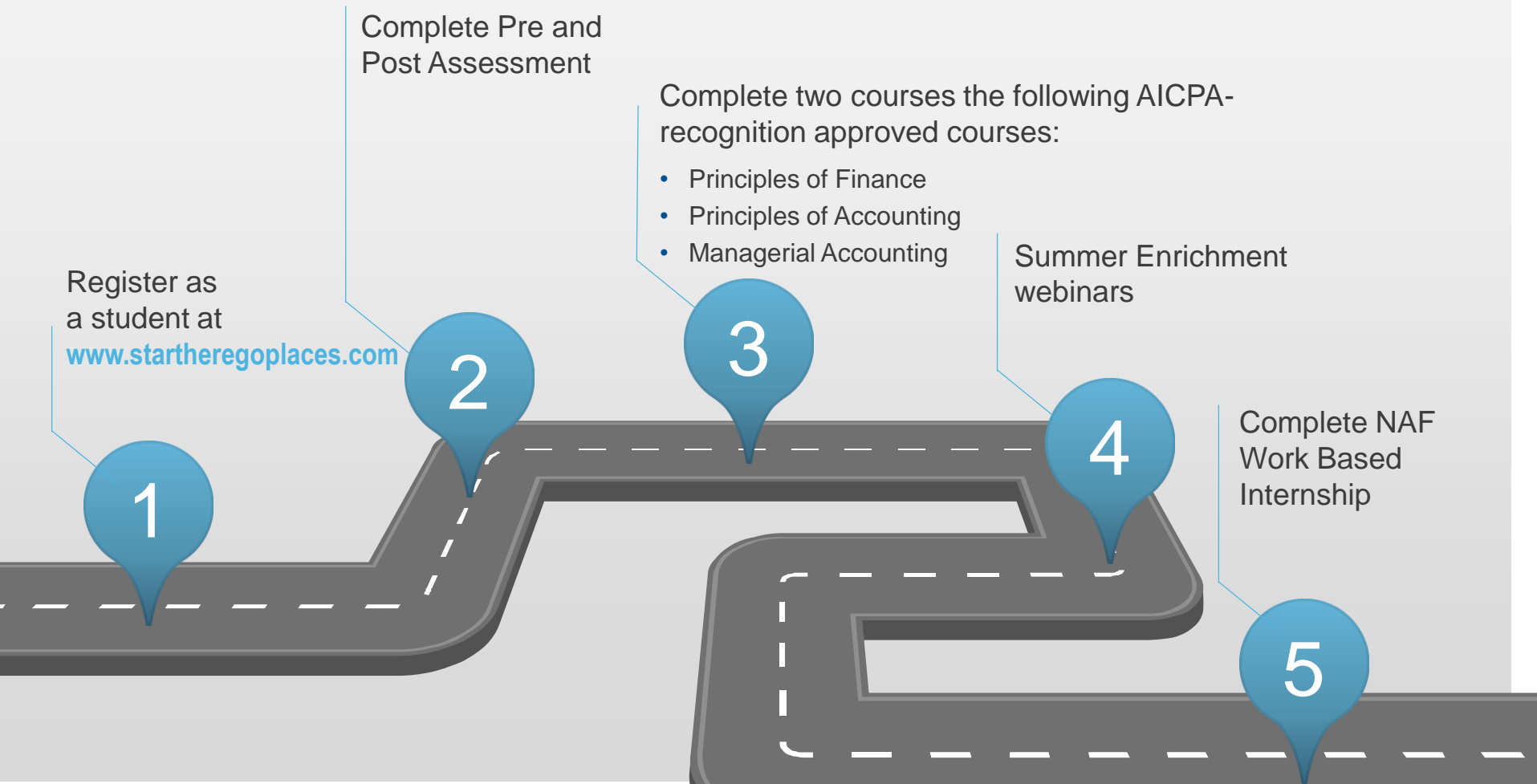
92% of graduates who provided post-grad intentions plan to go to college
59% plan to attend a 4-year college
30% plan to attend a 2-year college
3% plan to receive advanced training or obtain a technical degree



8% plan to enter the workforce exclusively

The Road to AICPA Recognition

For a NAF student to be eligible to receive an AICPA recognition upon graduation, they must:



NAF Summer Enrichment Program



WHERE TO FIND ACCOUNTING COLLEGE SCHOLARSHIPS

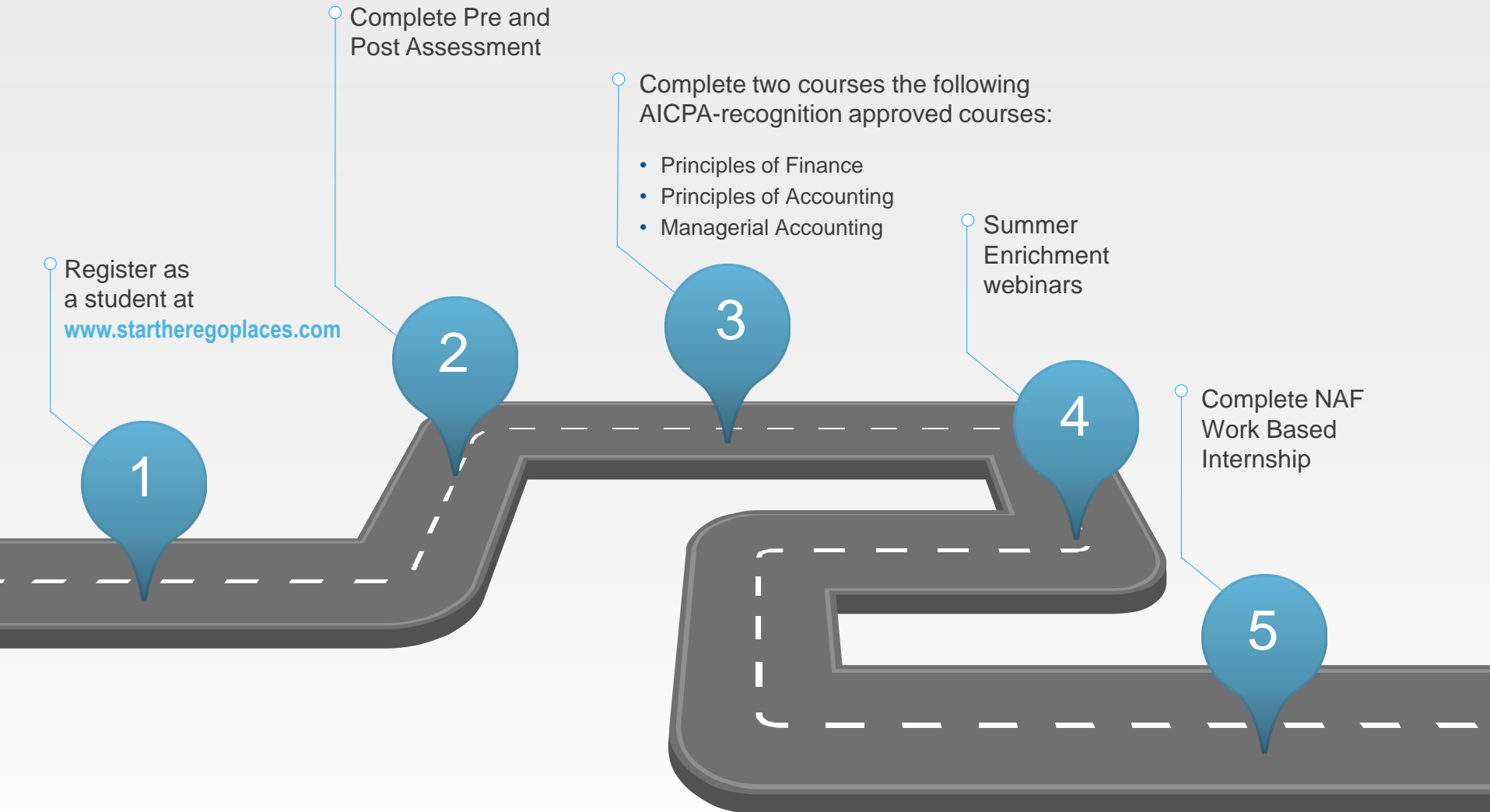
▶ **Online/Webinar series offered during summer months**

▶ **These webinars will:**

- Lay the foundation of requisite skill sets (soft and technical) for success in the profession,
- Provide exposure to many different accounting careers
- Encourage students to take subsequent accounting courses
- Prepare students for the an internship experience









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Proposed Potential State Society Opportunities

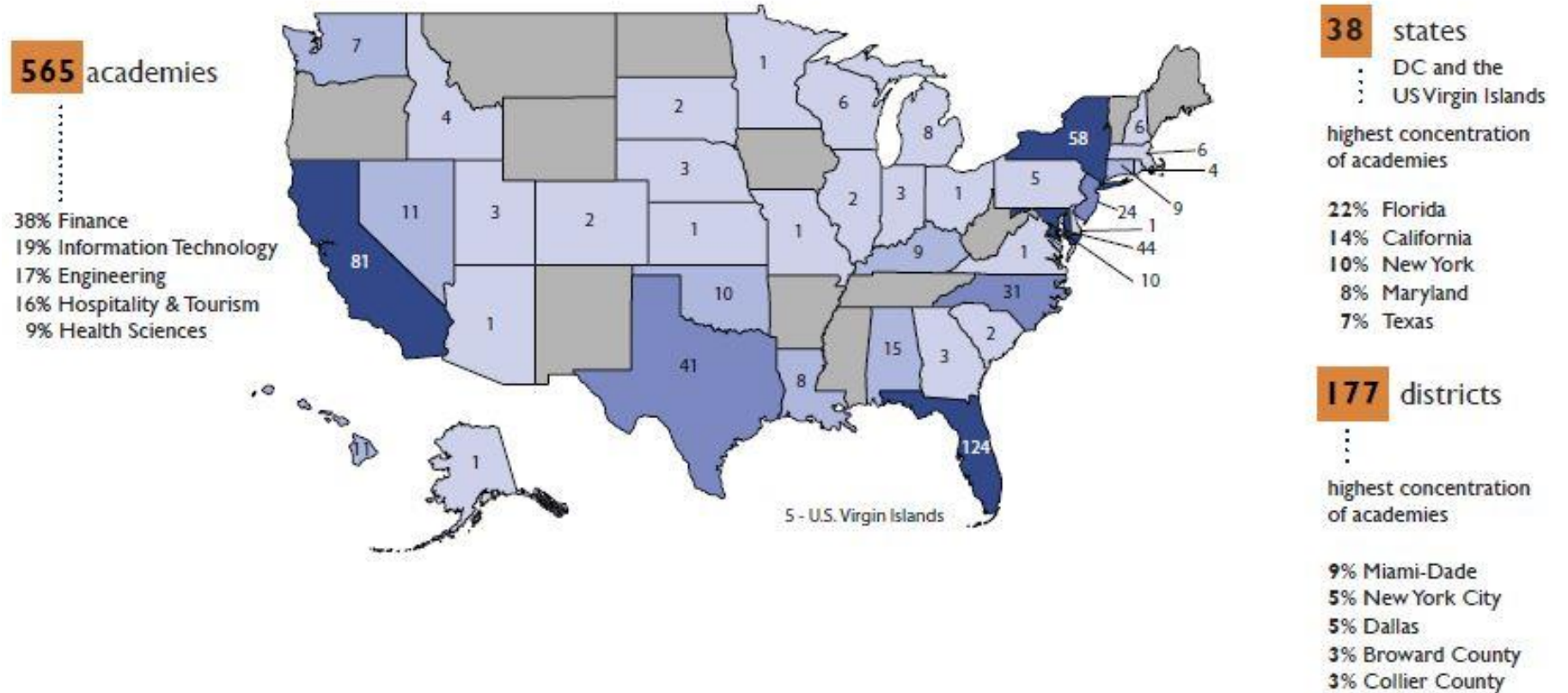
State societies who wish to participate in supporting the NAF program will be required to choose **one** of the following items **annually**.

<p>CPAs for a Day</p>	<p>Host Virtual Field Trips</p>	<p>Host a Bank on It Competition</p>	<p>Recruit Firms for Career Exploration</p>
 	 	 	 
<p>Provide members for NAF Advisory Boards</p>	<p>Branded Item Supply Donations</p>	<p>State Society Meeting Invitations for Teachers/ Parents/Students</p>	<p>Any Existing SS Minority High School Student Program that Includes NAF Students</p>

or

NAF Network

NETWORK



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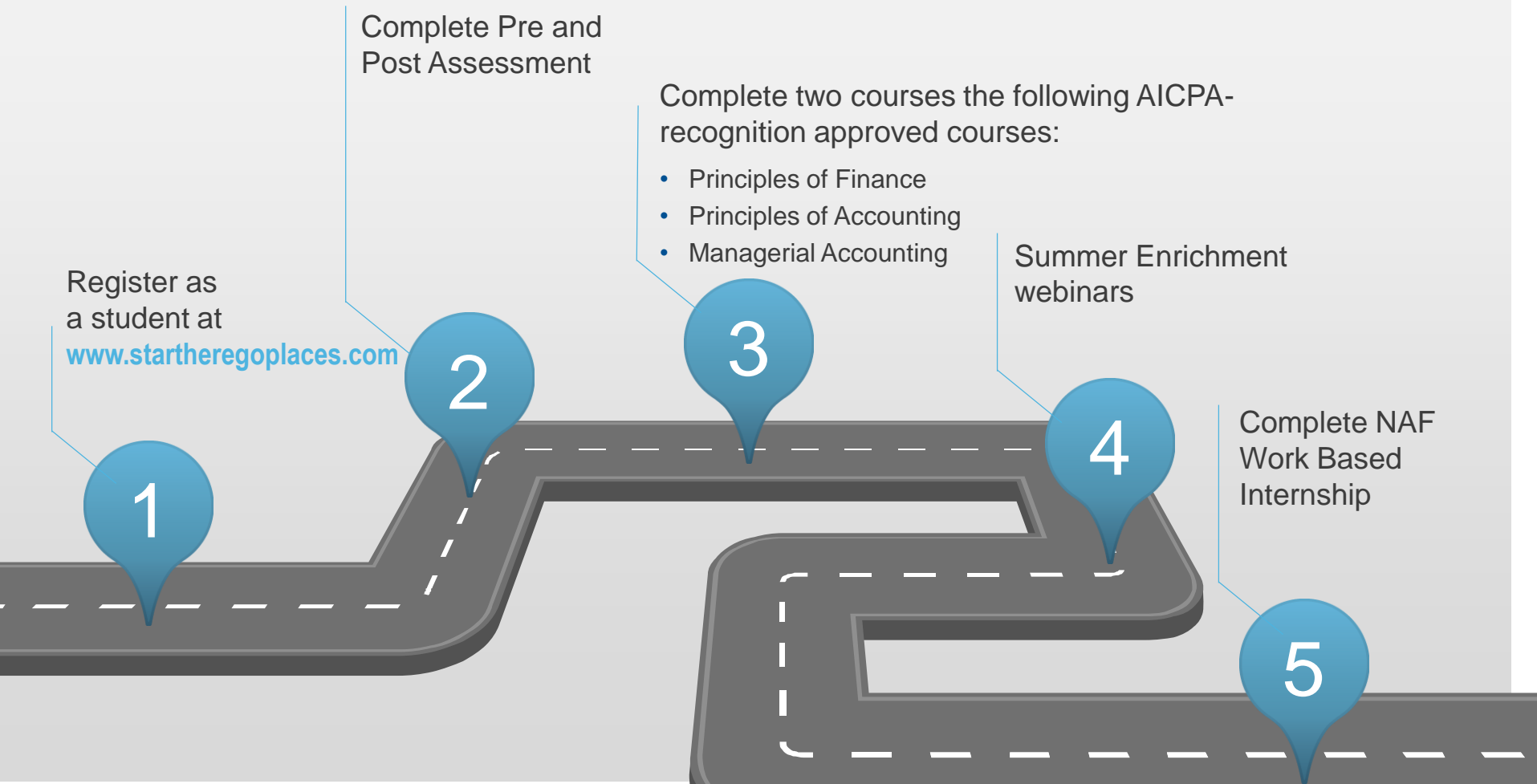
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CPA Exam

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Concept and Scope – Taking the CPA Exam

Continue to research, investigate, collaborate and propose best practices on how the profession can:

- Provide funding to cover CPA application and exam fees as full-time employment offer
- Offer educational grants and scholarships
- Funding through education assistance programs or pay advances/loans
- Sponsor CPA Review Courses
- Grant sabbaticals to allow employees time to prepare
- Develop ERGs focused solely on the CPA exam

Pipeline Implementation Overview

	Q2'2014			Q3'2014			Q4 2014			Q1'2015			Q2'2015			Q3'2015			Q4'2015			Q1'2016			Q2'2016			
	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	
Communication and Awareness																												
Research Student and Professional Influences				Research, Analyze and Report																								
Develop and Launch Communication and Awareness Plan and Campaign													Develop			Build			Launch									
Accountants in the Classroom						Design	Launch				Design	Launch				Design	Launch						Design	Launch				
Career Counselor/Educator workshops		Evaluate/Pilot		Form Partnerships and Build				Launch																				
School Based Programs																												
Evaluate, redesign, pilot and launch school based summer programs			Evaluate	Analyze and Report			Toolkit Development			Toolkit Released																		
Increase Scholarships (Community College, 4 year)									Evaluate	Increase dollars																		
Transfer to 4 year in accounting Toolkit															Pilot			Launch										
Expand presence in NAF Academy of Finance	Evaluate, Design, and Approve												Phase I Pilot															
Expand relationship with JA to incorporating accounting into career clusters				Evaluate and Propose				Approve and Beta Launch																				
CPA Exam																												
Strengthen HBCUs/HSIs/Tribal Colleges to better prepare students for CPA															Design and Build			Pilot										
Best Practices to support underrepresented minorities taking the exam															Design and Build			Launch										
Master's Program Conference																						Design and Build			Launch			
Funding for compensation and research for PhD faculty																						Design and Raise Funding			Launch			