Organizational Strategies: The Advancement of Women

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Introduction: The Pipeline Myth

The pipeline myth has been alive and well for decades. This myth tells us that once women in our profession have been in the career and leadership pipeline long enough, we will see the percentage of female owners and leaders in the profession increase. The myth tells us that we will eventually reach a state called parity, where the percentage of women owners and leaders will be equal to the percentage of females in the talent pool. Unfortunately this is, like many myths, just a myth. Women have been over 50% of the talent pool in the profession for over thirty years. We are not at parity as women represent only 23% of the owners in the profession and a lesser number of leaders in business and industry, estimated to be at about 13%. Why does this matter? Because the majority of our talent pool is not advancing in numbers equal to their presence in the profession. Our leadership ranks are, and will continue to be, weak both in terms of number and in terms of having a full talent pool to pull from. In addition, diversity in leadership has been proven by research\(^1\) and actual results to improve the performance of the organization.

The AICPA has been working on the issue of uneven representation of women in the profession through the efforts of the Women’s Initiatives Executive Committee (WIEC) which has been in place since xxxx. The committee has a long history of research and providing awareness raising and practical tools to promote the retention and advancement of women in the profession. In 2007, WIEC compiled the best practices from firms who have actively been addressing concerns regarding the lack of women’s advancement in the profession. The hard earned research, knowledge and practical experiences of these Firms were compiled into a comprehensive and affordable workshop for Firm Leaders. This workshop has been run on several occasions since 2007. The workshop offers a comprehensive and customized approach to the start up or improvement of a women’s initiative, including detailed background on the issues, a business case lesson and template, a baseline survey, communication documents, initiative strategic planning documents and action plans. All of these tools are explained in detail and Firms work on these during the workshop, with others from their Firm. The participants leave the 1.5 day workshop with a customized program ready to launch. Firms of all sizes have participated in

\(^1\) Catalyst
the AICPA WIEC Organizational Strategies Workshop. The Firms who have participated to date were interviewed recently to share their insights and experiences and thoughts about why Firms should participate in the AICPA WIEC Committee offering and what the major deliverables and practical results of participation have been.

Firm Experiences

Why did the Firms choose to attend the workshop?

“Women leaders and managers in our Firm recognized that we needed to be at the workshop. Women were on the outside looking in, not fully participating. Some vocal women, willing to voice concerns, brought the existence of the workshop to the Firm leaders. Statistics about women in the profession and their experiences with these concerns in Firms some of them came from previously drove them to request their Firm’s involvement in the workshop. The Firm recognized that there needed to be an effort; the pipeline of women had leaks and stagnation. The Firm had recently completed a merger and were at ground zero, which was a good time to begin looking at these issues in dept

“From the leadership perspective it was difficult to ignore the fact that there are no female partners in our Firm. We do have great female staff and managers, but the question remained as to how we could get them into leadership and partnership. The Firm had good talent, the Firm was growing and it was a relatively young firm. The demographics included many females in the process of major life changes. We were very concerned about how to keep them in the Firm. We could see that there would be a gap of leadership if a large portion of the talent left or was stagnated. Although there were many women in the Firm the pipeline to changing the partner numbers was not shifting. There was a big gap between the partner age group and most experienced women manager. There were women who were in the pipeline that have left. Partners struggled with women who were experiencing life changes and assumed their commitment was impacted which immediately limited their role in the future. The women were viewed as a non career track. This misunderstanding and tradition view became an issue that was driving career path stagnation.”

“We are pretty typical of other Firms. Many of the new hires are female and the percentage of males to females in the partner group is not consistent with the remainder of the Firm. There is no parity. We started digging thru trends. We learned that female turnover is double that of the male population. We understand that this automatically reduces the pool of talent. We want to make sure the opportunities are similar for men as they are for women. Our board added this goal as a strategic tactic of the Firm. We understand that turnover is very costly. We could see that there were lots of good reasons to start a formal initiative and no valid reasons not to...”
“Our main reason for attending is that our Firm has determined we must improve the retention and advancement of women. We have tried and not been successful in developing programming that makes a difference. We attended to get a feel for what the AICPA was offering. The AICPA generally has great training. We anticipated the workshop would be quality. We were right.”

What elements of the workshop were the most beneficial to you & why?

“There was nothing missing from this workshop. We were at the standing start. Detailed assistance on how and where to begin was most helpful. The deliverables such as the business case template, communication document, timeline, and sample plans were amazing. This is not rocket science but making sure they hit all the key elements was the essential to our success. This workshop was an affordable quick start- why recreate the wheel? The workshop very high value”

“The format of the workshop was one of the most beneficial things. This was not a typical seminar. The group was a perfect size. Bringing out colleagues and being able to work on things while there, applying the concepts to our plan during the workshop was unique. Learning the key elements of communication and the most effective way to sell the programming was also unique. The workshop presented a different perspective and comprehensive business case to get partner buy in.”

“One of the most important take always for us was the significance of the business case. We also learned that one element of an effective communication plan is the visibility of the commitment of senior leadership, the board, the CEO, COO, Partner Group. The visibility of leadership support is very important to the foundation of the business case. The workshop gives a great road map on where to start, how to get organized, and focused. The workshop gives the key to structure and action plans. These steps of setting the foundation can be the hard part. It is easy to forget or miss something. All the way from the prep work to the close of the workshop there was value. Gathering the pre-workshop data provided insight. Before this we were not even sure where to look to begin to get our bearings on direction. The structure and the productivity of the session were excellent. Before the workshop we knew we needed to more effectively address the lack of female advancement but we would not have known where to start. There were many new concepts and much practical direction.”

“Working on the business case for our Firm during the workshop was very different. Doing the practical work with the template was key. We were able to immediately see where concepts
What are the primary goals of your women’s initiative?

“Raising visibility of women, creating networking and mentoring opportunities are our goals. We want emerging women leaders to be comfortable talking about their careers. We observe that young males talk to SR Partners about sports, and other topics. This gives them common ground and comfortable access to senior leaders. The channel of communication with senior partners is not open for younger women. We intend to open this up. We recruit many women staff and it has become important to retain and advance them. Round tables and small group discussions with more sr males and younger females talking are planned as a result of the workshop. Sr male partners have been bringing some of the younger women to business development and networking events. This is a breakthrough. We see movement”

“Younger staff feel you cannot have a partner level role and family. We plan to change that perception. Men can learn from women as they are successful incorporating both career and family. This benefits our male emerging leaders also who want these same things but are not ready to discuss the issues due to lack of acceptance by older male partners. We also plan to increase women in leadership positions. The ultimate goal is a female equity partner sitting on the board. We plan to also work on educating women about career elements they are not getting in mentoring. We plan to see women on flexible schedules advance. “

“The primary goal is to make sure that when we hire anyone- male or female- they understand that they have the same opportunities till the day they retire from the Firm. We view this as a long term effort that involves culture change. One of our measurable items is narrowing the turnover rate of females. We see that midwestern views impact the pace of change. There are certain socioeconomic elements inherent in our population that we must deal with. However, we understand that individuals make better choices when they are informed choices. At the very least, if someone decides to leave the Firm or not to pursue ownership, we want them to be at peace this is the best decision, by ensuring they have a clear picture of their potential future. This clear picture must be presented long before they are faced with a decision”

“Our goal is to become more structured regarding female talent. Attracting talent and retaining talent. Many of our principals are part time. We do not want to lose them. We needed more
direction in our approach. Our goal is to develop this advancement of talent without creating resentment. Many women were thinking of it as extra help, many men were resenting it. The workshop helped with this."

Describe your progress on your women’s initiative?

“We see some new things happening. We are working on getting women comfortable in business development. With the workshop assistance we are not on a path of focusing on professional skills and not just the girls club. We are opening communication and skill building.”

“The culture of the Firm was a big part of the initiative. We have made some strides. The communication documents and learning from the workshop has been instrumental. The leaders are starting to invite women to the networking events. This is big, maybe bigger then we can see even today.”

“Last fall we put together the frame work for our initiative. We now have three subcommittees. We have a communications subcommittee whose focus is about awareness and education. For example: a program about the differences between male and female leaders in the workplace has been offered. Another subcommittee is offering networking opportunities for female staff. One of the emphasis areas they are addressing is: How can women work together to support each other? We are supporting guided interaction through meetings and groups of meetings. We also have begun a “Navigator/Sponsor” program through the “performer” team. This program addresses the need for career development and advocacy as learned in the workshop. All subgroups report back to committee and are in different levels of progress.”

“The Education subgroup is also integrating awareness raising into current training. As an example male and female gender training, about men and women in the workplace, has been introduced into existing training. Also at the recent partner meeting awareness raising content has been included. Any future firm wide events will feature relevant content.”

“We can relay one unique take away from the workshop that has resulted in great progress. One of our male leaders came back from the workshop with a new perspective about why there is an uneven playing field in the industry. The fact that there were male leaders from other Firms at the workshop was important. He learned about the background and the proven foundations of the issues. Our committees are now all men and women. All are influential players in our Firm. The male partner also learned that the participation of men is essential to the effort.”

What challenges have you faced in pursuing your goals with a women’s initiative?
“Younger women and more senior women have two different set of needs. This is a gap to be dealt with in offerings. We have learned we must provide support for the senior women who are called to be role models. They need energy and support to be pioneers and early role models.”

“We have a new performance process coming out. We want to be certain we have alignment with leadership development programming and performance counseling.”

What are your plans for the coming 12-24 months with your initiative?

“Want to continue increasing the awareness of the issue and communication.”

“All the effort is within the groups and committees. Focus is on timelines and accomplishments they want to reach in each one. Each committee has moved into a three year plan.”

“Working on these plans to continue and increase understanding of the business case. We want to be certain the programming is not viewed remedial but part of leadership development. This program is a leadership program we are ensuring it is in alignment with skill building that supports the definition of the partner and principal.”

“As the economy improves we will continue to refresh our action plans and put more activity into the coming year.”

“We will continue to participate in the networking calls which help us to stay on task and to hear how other Firms are doing with their programming. Our perspective stays fresh with continued contact with the original facilitators of the workshop.”

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