2015 Year in Review

2015 was a landmark year for the IMTA Division and our members. In addition to partnering with various other organizations to provide resources that help you better serve your clients or organizations’ information assurance needs, our IMTA team, committees and taskforces have worked hard to meet your needs and address emerging business and technology issues by adding member benefits, resources and learnings to our existing suite of member offerings. We are focused on creating an exceptional member experience in the coming year and delivering value consistent with your expectations.

We achieved two membership records worth mentioning: a record 30 CITP exam registrants sat for the July CITP exam, and during the month of August a record 94 new members joined the IMTA section.

Here’s a look back at the various milestones, as well as member benefits and resources released in 2015. This is a snapshot of some of the many benefits you receive as IMTA member or CITP credential holder.

Provide feedback to imtainfo@aicpa.org on the resources or benefits you value most and/or additions and improvements you’d like us to consider.

Milestones

• ARMA
  The IMTA Section is partnering with ARMA, a not-for-profit professional association and the authority on governing information as a strategic asset, to offer a valuable member benefit, an on-demand training video, explaining the principles of records management and information governance. Records Information Management (RIM) is the practice of managing and controlling what are considered to be the most important records of an organization throughout the record life cycle. The solution to RIM is Information Governance (IG). Information Governance is the set of multi-disciplinary structures, policies, procedures, processes, and controls implemented to manage information at an enterprise level, supporting an organization’s immediate and future regulatory, compliance, legal, risk, and operational requirements. In addition to the on-demand training video, the IMTA Section will also offer eight valuable member discounts on e-learning bundles. These bundles address areas of RIM and IG.

• Safari Books Online
  o Selected 100 new titles to update the online member resource library
  o Developed ten new tutorial titles to be released by December 2015 on business/IT topics
  o Implemented the mobile application for member ease of use - December 2015

• Journal of Accountancy Tech Success Tracker
  o The Journal of Accountancy Tech Success Tracker is a free tool provided in conjunction with the AICPA’s PCPS and IMTA sections. It helps accounting professionals calculate the return on their technology investments and see how their firm or business compares to their peers.

• IMTA Standing Ovation Recognition Program
  The AICPA’s Standing Ovation Program recognizes young CPAs who exhibit exemplary professional achievement in one or more of the following areas: business valuation, forensic accounting, information management and technology assurance or personal financial planning. Winners will be announced at the annual AICPA conferences dedicated to each specialized area of accounting. In addition, each winner will be recognized with a press release and will be highlighted on the corresponding AICPA website.
JIS Conference - March 2015
  o Over 40 research professors from various universities attended the inaugural AAA-JIS conference held in Durham NC in March 2015. The conference received over 20 applications for review of research papers. Ten papers were selected for potential publication in the JIS journal, of which 5 were presented by the researchers in person during the conference. IMTA committee members participated in review of the papers as practitioner technical reviewers, both in writing and in person as a panel participants during the conference. The goal was to support accounting academic research with practitioner technical reviewers to affirm market applicability of the research, and serve as overall general reviewers.
  o AAA-JIS Survey: Audit Professionals and their relationship with information security - Nov 2015
    ▪ Stats: 140 respondents
  o AAA-JIS Survey: Leveraging continuous monitoring of business analytics to facilitate enterprise risk management. - Nov 2015
    ▪ Stats: 28 respondents

Committees and Taskforces
  • Hosted Joint Committee Meetings
    o Offered 1-5.5 CPE credit hours in June 2015
    o Offered 6 CPE credit hours in November 2015
  • Task Forces
    o Service Organization Controls (SOC)
    o Privacy
    o Cybersecurity
    o CITP Champions
    o CITP Exam

News and Communications
  • IMTA News – 27 issues
  • InfoTech – 10 issues
  • AICPA Insights blogs
    o “Make it or break it with IT policies and procedures”
  • Social Media
    o Cybersecurity Trends Twitter Chat - June 2015
      ▪ Topic: “Concerns & Knowledge around Security”
      ▪ Results from the Chat:
        ▪ 196 tweets
        ▪ 181,249 impressions/timeline deliveries
        ▪ 40 total contributors
    o Cybersecurity Assessment Tool Twitter Chat - October 2015
      ▪ Results
      ▪ 97 tweets
      ▪ 885,610 impressions/timeline deliveries
      ▪ 19,044. unique users that saw the tweets
    o Hack-a-thon Twitter Chat - November 2015
Webcasts

- Fundamentals of Tax Information and Data – January 2015
- Top Technology Initiatives Survey Results – June 2015
- Hot Topics in Cybersecurity CPAs Should Know – July 2015
- SOC 1, 2, 3 Overview – August 2015
- How to Start a SOC Practice – September 2015
- Building Assurance-How to Manage Privacy Risk In-House and Downstream – October 2015
- Auditing in the Information Age – November 2015
- SOC 2 Update – November 2015

Guides and Publications

- 25th Anniversary Top Ten Technologies Whitepaper - June 2015
- We have three new guide series under development with a technical ghost writer:
  - SOC
  - IT Audit
  - Cybersecurity
  - Two proposals in process:
    - IT Risk and Governance – Advanced
    - Privacy

Marketing and Media

- Media Impression – responded to nearly 15 media inquiries for expert response
- Renewals – emails, letters, phone calls
- IMTA and CITP value prop created
- Puzzle campaign

Conferences and Live Education

- AICPA conferences/schools attended by IMTA staff
  - SOC School – May 2015
  - Practitioners Symposium and Tech+ Conference – June 2015
  - IT Audit School Advanced – July 2015
  - NAAATS Conference – July 2015
- State Societies Conferences attended by IMTA staff
  - GSCPA Southeastern Accounting Show - August 2015
- Conferences attended by CITP champions
  - VSCPA Business & Industry - May 2015
  - FICPA Accounting Show - September 2015
  - SW Chapter of PA State Society - September 2015
- Non- AICPA Conferences attended by IMTA staff and EC/CC members
  - ARMA Conference –
    - March 2015 with Adam Haverson
    - October 2015 with Dan Schroeder and Christine Ravago
• IMTA Supported Conferences Schools
  o AICPA SOC School
  o IT Audit School (Basic and Advanced)
  o Tech+ Planning Committee
  o Digital CPA Planning Committee
  o NAAATS Planning Committee
  o EDGE Planning Committee
  o Manufacturers Planning Committee

Advocacy

• National Institutes of Standards and Technology’s (NIST’s) Small Business Information Security: The Fundamentals (NISTIR 7621 Rev.1) – February 2015

Member Discounts

• Receive four complimentary CPE-accredited pre-selected IMTA-sponsored webcasts annually (up to eight hours)
• IDEA – 10%
• InformationActive – 25%
• IAPP Conference discount - $300
• ARMA bundle discounts up to 50%
• ITA conferences member price of $950
• Discounts off AICPA Member Price
  o Specific AICPA webcasts
  o Tech+
  o NAAATS
  o Controllers
  o Digital CPA
  o IT Audit Schools (Basic and Advanced)
  o SOC School
  o Various publications