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**VALUATION, FORENSIC ACCOUNTING, AND LITIGATION SERVICES
STRATEGIC PLAN WORKSHEET FY 2011-12**

Section Mission Statement: To provide opportunities for knowledge sharing and technical excellence in all areas of valuation, forensic accounting and litigation services.

Goal & Objective Summary

Goal 1: The Section will provide opportunities for member-to-member sharing of knowledge relating to valuation, forensic accounting, and litigation services.

Objective 1: By June 2012, maintain the Valuation, Forensic Accounting, and Litigation Services Section **Web site**.

Objective Coordinator: Arlene Ravalo-Jao

Objective 2: By June 2012, enhance Section member use of and participation on the **Section Discussion Board** (Listserv).

Objective Coordinators: Robin Lennon

Objective 3: As requested, members will **seek authors** to produce articles for Florida CPA Today magazine and CPA NetLink (Web site).

Objective Coordinator: Steering Committee

Goal 2: The Section will provide opportunities for members to participate in professional development activities relating to valuation, forensic accounting, and litigation services.

Objective 1: By January 2012, hold the annual **Valuation, Forensic Accounting, and Litigation Services Conference**.

Objective Coordinator: Marcie Bour 2012; Arlene Ravalo-Jao

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Objective 2: By June 2012, monitor relations with appropriate sections of the Florida Bar.

Objective Coordinator: Arlene Ravola-Jao

Goal 3: To provide comment to appropriate FICPA leadership on exposure drafts, legislation, rulemaking and other related issues.

Objective 1: As needed, comment to the FICPA on **legislation, rulemaking, and other issues.**

Objective Coordinator:

Goal 4: To enhance Section structure, develop future leaders, and provide opportunities for general Section members to get involved.

Objective 1: By June 2012, develop **Section Task Forces** as needed.

Objective Coordinator: Steering Committee

Objective 2: By June 2012, review **VFALS Leadership Succession Plan**

Objective Coordinator: Steering Committee

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Goal 1: The Section will provide opportunities for member-to-member sharing of knowledge relating to valuation and litigation.

Objective 1: By June 2012 maintain the Valuation, Forensic Accounting, and Litigation Services Section Web site .		
Objective Coordinator: Jonathon Gorman		
Strategies	Target Date for Accomplishing Strategies	Volunteers/Resources for Accomplishing Strategies
1) Confirm Objective Coordinator	Done July 2012	Steering Committee to provide coordination and oversight. Content providers/maintenance: [see Web Site Task Force list at the end of this document]
2) Maintain and continue to update VFALS website. Establish coordinators for content. 3) Track and report on website and list serve traffic at committee meetings to include # of hits in practice areas (can we drive down to specific pages and practice tools).	On-going	
4) Explore the use LinkedIn as a way to reach our members	September 2012	Updates members as to changes to the LC website
5) Develop a cross-reference/bibliography for specific areas on topics that are mirroring big areas on the website. Too include the topics of the last three-five conference agenda.		

Goal 1: The Section will provide opportunities for member-to-member sharing of knowledge relating to valuation and litigation.

Objective 2: By June 2012, enhance Section member use of and participation on the Section Discussion Board (Listserv).		
Objective Coordinators: Robin Lennon		
Strategies	Target Date for Accomplishing Strategies	Volunteers/Resources for Accomplishing Strategies
1) Confirm Objective Coordinator	July 2011	Volunteers to be assigned monthly
2) Develop plan to enhance Section member use and participation of the Section Discussion Board. Continue to seed and promote discussion. Assign as agenda item committee meeting. Solicit volunteers to post monthly on hot topics.	Ongoing	-Encourage anonymous posting. -Send reminders to Section on benefits and how to use Listserv. -Seed questions to promote discussion.

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3) Top 5 Listserv topics will be posted on the front page of Website	Ongoing	
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Goal 1: The Section will provide opportunities for member-to-member sharing of knowledge relating to valuation and litigation.

<p>Objective 3: As requested, members will seek authors to produce articles for Florida CPA Today magazine and CPA NetLink (Web site).</p> <p>Objective Coordinator: Steering Committee – August 2012</p>		
Strategies	Target Date for Accomplishing Strategies	Volunteers/Resources for Accomplishing Strategies
1) Determine Editorial Content.	July 2012	FCT Editor
2) Recommend Authors	As needed	FY 11-12 Editorial Committee
3) Select technical reviewers	As needed	Steering Committee

Goal 2: The Section will provide opportunities for members to participate in professional development activities relating to valuation forensic accounting and litigation services.

<p>Objective 1: By January 2012, hold the annual Valuation, Forensic Accounting, and Litigation Services Conference.</p> <p>Objective Coordinator: Marcie Bour 2012; Arelen Ravalo-Jao 2013</p>		
Strategies	Target Date for Accomplishing Strategies	Volunteer Resources for Accomplishing Strategies
1) Update on current conference status (if needed)	During committee conference calls, as needed	Stephanie Thomas – Conference Manager

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<p>2) Discuss methods to increase Section member registration for the January 2012 Valuation and Litigation Services Conference.</p> <ul style="list-style-type: none"> • Targeted Marketing • Technical • Planning Strategies 	<p>During monthly conference calls, as needed</p>	<p>2010-11 Conference Planning Committee</p>
<p>3) Plan January 2013 Conference</p> <ul style="list-style-type: none"> • Review January 2011 Conference Participant Evaluations • Establish the rest of planning steps <ul style="list-style-type: none"> ○ Dates & location ○ Conference Topics ○ Conference Speakers ○ Marketing Plans-Electronic 	<p>April/May 2012</p>	<p>2011-12 Conference Planning Committee</p>
<p>4) Create and present overview of VFALS website. Make pitch to secure additional section members)</p>	<p>January 2012</p>	<p>Arlene Ravalo-Jao</p>
<p>5) Identify ways to promote participation in the Reception (i.e. Evite Section members</p>	<p>December 2011</p>	<p>Staff</p>

Goal 2: The Section will provide opportunities for members to participate in professional development activities relating to valuation, forensic accounting and litigation services.

<p>Objective 2: By June 2012, monitor relations with appropriate sections of the Florida Bar.</p> <p>Objective Coordinator: Arlene Ravalo- Jao</p>		
<p>Strategies</p>	<p>Target Date for Accomplishing Strategies</p>	<p>Volunteers/Resources for Accomplishing Strategies</p>
<p>1) Confirm Objective Coordinator</p>	<p>July 2012</p>	<p>Relations with the Florida Bar Committee</p>
<p>2) Objective Coordinator will act as liaison with Chair of the Relations with the Florida Bar Committee and work to continue to foster relationship with the Bar to benefit Section members.</p>	<p>Ongoing</p>	
<p>3) Receive and update at each committee meeting from the Florida Bar meetings</p>		

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Goal 3: To provide comment to appropriate FICPA leadership on exposure drafts, legislation, rulemaking and other related issues.

Objective 1: As needed, comment to the FICPA on **legislation, rulemaking, and other issues.**

Objective Coordinator: Steering Committee (as items develop)

Strategies	Target date for Accomplishing Strategies	Volunteers/Resources for Accomplishing Strategies
1) Confirm Objective Coordinator	July 2012	John W. Johnson – Director of Governmental Affairs State Legislative Policy Committee
2) Review State Legislative Policy items with Governmental Affairs and determine if additional steps are needed.	On-going	
3) Review and provide comment on AICPA exposure drafts and other items as needed. Exposure Draft Review Process <ul style="list-style-type: none"> - Exposure draft sent to team for initial review. At time of distribution team will be asked to provide conference call availability within the following month. - Team will meet via conference call to discuss response. - Team will finalize response via e-mail and/or the Listserv. - Response will be submitted to the Executive Committee for review. - Once approved by Executive Committee, response will be submitted to appropriate organization. 	Ongoing	

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Goal 4: To enhance Section structure, develop future leaders, and provide opportunities for general Section members to get involved.

Objective 1: By June 2012, develop Section Task Forces as needed.		
Objective Coordinator: Steering Committee		
Strategies	Target Date for Accomplishing Strategies	Volunteers/Resources for Accomplishing Strategies
1) Develop Section Task Forces as required.	TBD	

Objective 2: By June 2012, create VFALS Leadership Development Plan .		
Objective Coordinator: Steering Committee		
Strategies	Target Date for Accomplishing Strategies	Volunteers/Resources for Accomplishing Strategies
1) Develop a plan to promote the resource council member involved in the actions of the Section	November 2011	David Isley Paul Dumm

VFALS - FY 11-12 WEBSITE TASK FORCE CONTACT INFORMATION

Steering Committee

<i>sortname</i>	<i>xfirm1</i>	<i>Website Section</i>	<i>Website Area / Role</i>
Ravalo-Jao, Arlene		General	Website Task Force Coordinator
Adkins, Deborah S.	Deborah S. Adkins, CPA	Forensic	Forensic Site Lead
Dumm, Paul	McGladrey & Pullen, LLP	Litigation	Litigation Services Site Lead
Lennon, Robin C.	Dreggors, Rigsby & Teal, PA, CPAs	Valuation	Valuation Site Lead; and Family Law Valuation
Conrad, Lillian M.	Lillian Conrad, CPA	Litigation	Punitive Damages
Lynch, Robert E.	Cross, Fernandez & Riley, LLP	Valuation and Forensic	ESOP; FL Statutes

Current Resource Council

<i>sortname</i>	<i>xfirm1</i>	<i>Website Section</i>	<i>Website Area / Role</i>
Cooper, C B.	PCE Companies	Valuation	ESOP; Financial Reporting
Ebersole, Beth C.	Kerkering, Barberio & Company	Valuation	Estate and Tax Issues
Garces, Ivan A.	Kaufman, Rossin & Co, PA	Forensic	Books & Pubs; Webresources
Isley, Robert D.	McHale, Caruso, Scullion & Co	Litigation	Bankruptcy
Perez, Sandra L.	Berkowitz Dick Pollack & Brant	Litigation	Family Law
Steadman, Scott A.	LBA Certified Public Accountants, PA	Forensic	Books & Pubs; Webresources
Thomas, William	MBT Consulting, Inc	Litigation	Construction Claims
Thompson, Kenton E.	McGladrey & Pullen, LLP	Valuation	Intellectual Property; M&A

Section Members

<i>sortname</i>	<i>xfirm1</i>	<i>Website Section</i>	<i>Website Area / Role</i>
Bernstein, Curtis H.	Healthcare Appraisers, Inc	Valuation	Healthcare
Bouchner, Scott M.	Berkowitz Dick Pollack	Litigation	Economic Damages (Commercial)
Williams, Vern	Carr, Riggs & Ingram, LLC	Litigation	Eminent Domain

Open / Available for additional volunteers

<i>sortname</i>	<i>xfirm1</i>	<i>Website Section</i>	<i>Website Area / Role</i>
		Valuation	Shareholder / member issues
		Litigation	Economic Damages (Personal)
		Litigation	Economic Damages (Commercial)