

+10 = 20: A VIEW TO 2026

The Institute of Certified Bookkeepers, continuing to lead Bookkeepers Professionalism

Endorsed by the ICB Team
& Directors
November 2016

BACKGROUND

- The past 10 years
- ICB Global
- ICB Aust Policy & Philosophy paper
- The Internal Review
- Directors Endorsement
- Members input and endorsement

ENDORSED

- Policy & Philosophy Statement
- What we do
- What we will do

POLICY & PHILOSOPHY

“Bookkeepers helping Bookkeepers helping Business”

Global Recognition – National Accreditation – Local Focus

POLICY & PHILOSOPHY

Concept Statements

- ICB promotes and maintains the standards of bookkeeping as a profession, through the establishment of expectations, relevant qualifications and the award of grades of membership that recognise academic attainment, working experience and expertise.

ICB GLOBAL OBJECTIVES

ICB Global states The Institutes objectives are:

- To promote bookkeeping as a profession
- To enable bookkeeping to gain recognition as an integral part of the financial profession
- To promote training in the principles of bookkeeping
- To enable the achievement of a qualification
- To improve the career prospects of its members

WHO IS ICB GLOBAL

- ICB UK + ICB AUS + ICB USA = ICB Global
- 3 Voting Member Bodies, 132 Members

Global Recognition – National Accreditation – Local Focus

- A global network of Country based professional associations
- Benefit by doing it together
- Provide Framework, perspective, infrastructure, identification/recognition

ICB AUS. VISION

In Australia, the ICB provides bookkeepers with the co-operative forum to be the best they can be. It is about bookkeepers: Bookkeepers helping bookkeepers helping business.

The vision of the ICB is

To provide bookkeepers

- With the co-operative forum
- To be the best they can be

It's about bookkeepers

- Recognition
- Education

The ICB aims to bring certainty to the bookkeeping profession and all involved and affected by it. It answers the questions: What does a bookkeeper do? How skilled is this bookkeeper? How do I prove my bookkeeping skills? How do I improve my bookkeeping skills? How do I do bookkeeping better? What are the benefits of being part of a professional organisation for bookkeepers?

What does a bookkeeper do

How do I improve my skills

How skilled is this bookkeeper

- ICB will **accredit**, **assist** and **inform** bookkeepers and the community thereby increasing the structure and definition of the profession.
-
- ICB will **promote** Certified Bookkeepers and develop the Professionalism of Certified Bookkeepers
-
- ICB is a member based, not for profit, professional association: bookkeepers helping bookkeepers."

WHO IS ICB AUST.

- Not for profit
- Member based
- Professional association
- Bookkeepers

- A part of the ICB Global network

THE PURPOSES OF ICB

- To facilitate forums of information, experience and education exchange
- To provide Resources and Guidance for the best practice of bookkeeping
- To provide support for certified bookkeepers including technical assistance
- To Promote Certified Bookkeepers
- To develop the professionalism of Certified Bookkeepers
- To provide commercial benefit from being a member of this network
- Embrace, Support & Promote the BAS Agent regime
- To provide opportunities for the gaining of experience under supervision
- To ensure government & key stakeholders listen to, consider and promote certified bookkeepers and their reality



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"To provide"

- Facilitate
- Help organise
- Administer
- Be involved in



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"Bookkeepers"

- Contract, self-employed or Employees
- Not typically qualified accountants
- From basic data entry through to those competently and comprehensively providing business reports (P&L, Balance Sheet, Sales Reports & the BAS)
- Those providing verification and certainty to business owners
- Those providing GST, BAS, Payroll or SGC advice and services, including BAS Agents
- Those providing Integrated Business Systems Management including software, automation and integration services



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“Co-operative forum’

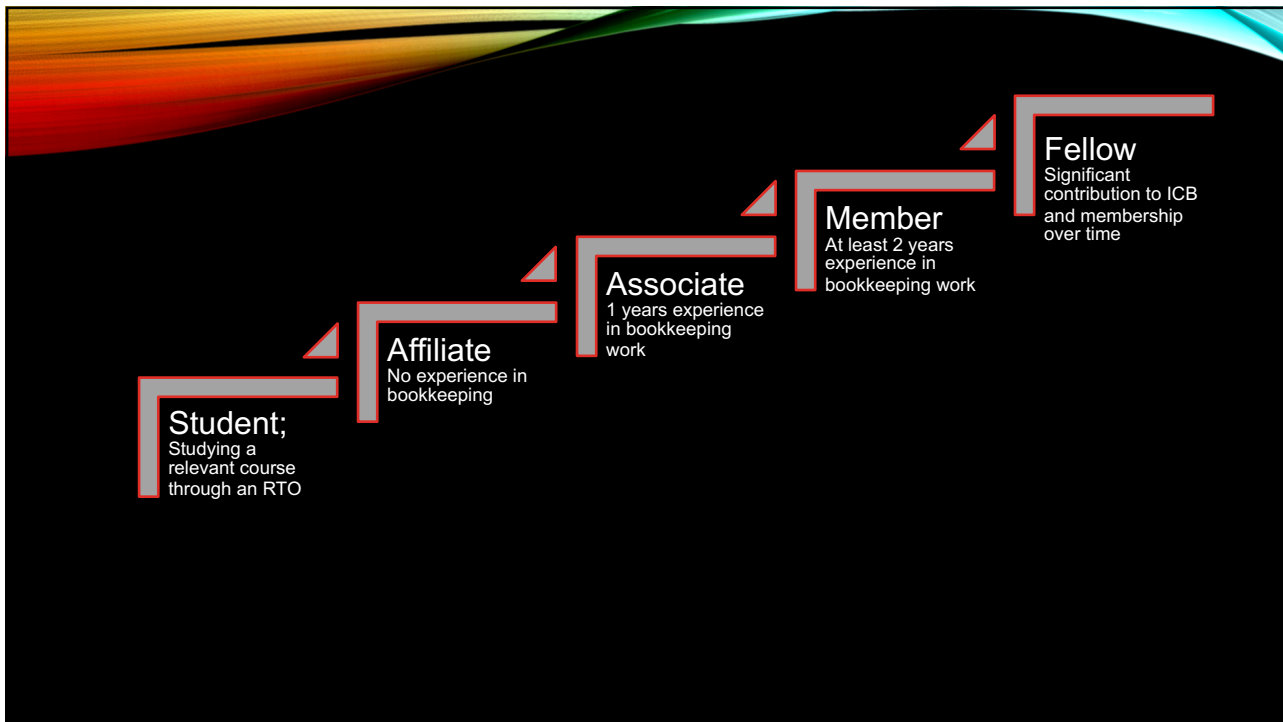
- Membership based
- Directed/facilitated network meetings
- Locally responsible, co-ordinated
- Nationally facilitated
- Not for profit – benefit for the members



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“To be the best they can be”

- A flexible membership system that allows a bookkeeper to determine how far they want to go and how much they want to be involved
- To facilitate accreditation, education, recognition, certification
- To provide technical, procedural and operational support
- To provide benefits that assist



MEMBER INTERACTION

"To facilitate forums of information, experience and education exchange"

- Network meetings (local & online)
- National/State network conference
- Co-ordinate discussions of experiences
- Facilitate and administer Social Media and online forum interactions

RESOURCES

"To provide Resources and Guidance for the best practice of bookkeeping"

- Regulation/legal tax/accounting standards updates & information
- Newsletter and Web based Resources
- Explaining "How to do" all facets of bookkeeping, including Payroll, GST, SGC, TPAR
-

SUPPORT

"To provide support for certified bookkeepers including technical assistance"

- Provide technical support for Certified Bookkeepers
- Provide relevant expert advice and training
- Promote relevant training

MEMBER BENEFITS

"Commercial benefit"

- Bulk purchase discounts
- Bookkeeper PI insurance
- ATO recognition
- Government recognition
- Membership discounts
- Support services
- Technical backup
- Other

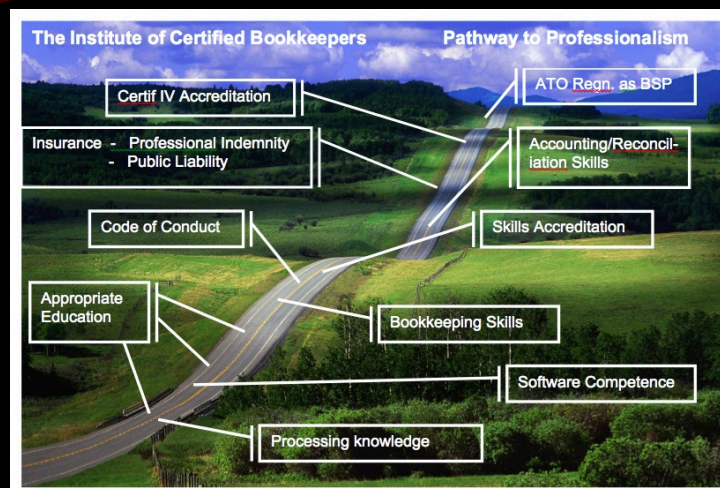
BAS AGENTS

"To embrace, support and Promote the BAS Agent regime"

- Recognising that not everyone wants to or needs to have this status
- Providing additional support and guidance for BAS Agents
- Providing opportunities for gaining of experience and providing supervision by members
- Develop opportunities to promote the BAS Agent regime

STAKEHOLDERS

- "To ensure government & key stakeholders listen to, consider and promote certified bookkeepers and their reality"
 - Provide a voice into respective government consultations and departments
 - Lobby government to recognise and promote Certified Bookkeepers & BAS Agents
- Work with key stakeholders especially software companies



GETTING AHEAD OF THE GAME

How does ICB do this?

- Engage with bookkeepers
- Speak in their terms
- With their perspective
- Provide Bookkeeper centric resources and help

Focussed on the whole bookkeeping profession

- Not just BAS Agents
- Not just Contract Bookkeepers
- Not the accounting sector

PERSPECTIVE

How does the ICB Team do this?

- Remember the Bookkeeper does NOT HAVE to be a member
- We must provide such value to the bookkeeper in an acceptable deliverable mode that they choose us
- We must be in tune with, understand, relate to and listen to bookkeepers
- We do it for them!

TEAM

Each of us bring a view to the table from our perspective and area of involvement

- We need to contribute
- We need to listen
- We need to get on with it

We are to be an ICB team where everyone is valued, considered as an equal.

HOW WILL WE DO IT

- Continue to hold true and develop existing successful initiatives
- Dedicate resources and time to the leap frog initiatives

REVIEW #1

Appoint an Office Manager (project management and communication)
Digital Content Manager
Governance review
Additional Directors

WHAT WE WILL DO

Leap frog strategies (taking us into the next 10 years)

- Mentoring
 - External "partners"
 - What are the parameters
 - Specialist Advisory group to help establish
- Education
 - What do we want in the Cert IV
 - What do we want in Payroll formal qualification
 - What might be in Skill Sets (on top of the cert IV)
 - Education Advisory Board formed to collaboratively create our ICB view

WHAT WE WILL DO

Leap frog strategies (taking us into the next 10 years)

- Proactive management / involvement of Stakeholders
 - Software
 - ANZ
 - Active Management
- Conference Apps
 - Technology refresh into the Conference
- Supporting ICB Global
- Further events (HR)
- Enhanced Social Media
- Enhanced Digital & Content management & design
- Enhance time into Network Meetings

BENCHMARK GROWTH STEPS

- Create the points of conscious expansion
- At what membership levels can we embark on the next initiative
- Monitoring
 - Member services
 - Support
 - Network Meetings
 - To expand to ensure status of services

EXTERNAL FACTORS

- Education review is happening
- Single Touch Payroll is happening
- Simpler BAS is happening
- eInvoicing is happening
- Technology is developing

The ICB

- **Bookkeepers for Bookkeepers**
- Professional Association
- Not for Profit
- Member based
 - Credibility
 - Network Communication
 - GST/BAS ATO Registration Assistance
 - Support
 - Resources
- Professional Conduct/Standards
- Professional Indemnity Insurance
- Represent Bookkeepers to government & providers