



## Agenda – HR Leaders Fly-In

October 16-17, 2024

Host Firm: Kathy Sealman, Richey May & Co., Englewood, CO

<b>Tues – October 15</b>		
6:00 pm	DINNER FOR THOSE ARRIVING IN TIME (a calendar invite will be sent for the venue for RSVPs) <b>Hacienda Colorado</b> - 10500 Bierstadt Way Englewood, CO 80112 - walkable - across the parking lot from the hotel	
<b>Wed - October 16</b>		
7:30 am	BREAKFAST ON-SITE	
8:00 – 8:30 am	Welcome and Introductions	<a href="#">Melisa Cook</a> (Chair)
8:30 – 9:00	<b>A View from The Corner</b>	<a href="#">Jason Yetter</a> , MP, Richey May & Co.
9:00 – 10:00	<b>Compensation</b> Pay Transparency, Bonus Programs, etc.	<a href="#">Jen Sides</a>
10:00 – 10:15	BREAK	
10:15 – 11:15	<b>Staff Retention</b>	<a href="#">Kathy Sealman</a>
11:15 – 12:00 Noon	<b>Parking Lot</b>	Melisa Cook
12:00 – 1:00 pm	LUNCH ON-SITE	
1:00 – 2:00	<b>Process Improvement</b> Any New Systems to do x?	Jen Sides
2:00 – 3:00	<b>Parking Lot</b>	Melisa Cook
3:00 – 3:15	BREAK	
3:15 – 4:15	<b>In-Person Guest Speaker: Cybersecurity Safety to HR: Technology sensitive information that we may not have considered</b>	<a href="#">Michael Nougulier</a> or <a href="#">Parker Brissette</a> , Richey May & Co.
4:15 – 5:00	<b>Parking Lot</b>	Melisa Cook
6:00 pm	DINNER OFF-SITE (a calendar invite will be sent for the venue for RSVPs) <b>Via Baci</b> - 10005 Commons St. Ste 200, Lone Tree, CO 80124	

<b>Thurs - October 17</b>		
7:30 am	BREAKFAST ON-SITE	
8:00 – 9:00	<b>Automation and HR Platforms</b>	Melisa Cook
9:00 – 10:00	<b>Parking Lot</b>	Melisa Cook
10:00 – 10:15	BREAK	
10:15 – 10:45	<b>Recruiting</b> Non-CPA Professional Paths, etc.	<a href="#">Cheryl Johnson Glover</a>
10:45 – 12:15	<b>In-Person Guest Speaker: Election Year/Political Aspect: What could we expect with new legislation impacting employment law</b>	<a href="#">Laura Friedel</a> , Levenfeld Pearlstein, LLC
12:15 pm	BOXED LUNCH TO GO	
<b>Open Forum/Parking Lot</b> <i>(add topics to this list throughout the meeting)</i>		
Demand to not work “busy season hours”		
Ensure more conversations are happening surrounding performance		
Dashboards – What to Measure/Track		
Are firms offering the childcare credit and ER Tax free student loan repayments		
Community service hours allotted by year, per team member		
Learning & Development: 150 credit collaborations; CPA exam time during work time; L&D software partners (LumiQ, LCvista, or others that are working well)		
What platforms are firms using for CPE tracking. Who is responsible for loading and tracking CPE data – the employee or the L&D team (please reference 2024 Salary + Benefits Survey – CPE Tracking/page 19). Would like to hear about experience on various platforms from others – what they love and don’t love and how their teams best utilize the system.		

### Steering Committee Members

Melisa Cook, Bennett Thrasher (Chair)  
Jennifer Sides, Anders  
Cheryl Glover, Draffin Tucker  
Kathy Sealman, Richey May & Co.  
Carla Blattenbauer, LEA Liaison

### Future HR Collaboration Group Calls

- November 21, 2024 – Annual Presentation on Key Compensation Trends in Public Accounting
- December 18, 2024 – Steering Committee Call to Discuss the HR Collaboration Group 2025 Activity Plan