



Accounting
Technicians
Ireland

STRATEGY 2024

SHAPING AND
RESPONDING TO THE
ENVIRONMENT



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P R E S I D E N T F O R E W O R D

Strategy is defined as a plan of action designed to achieve a long-term or overall aim. It was therefore critical that when commencing the development of Strategy 2024, we agreed on the desired outcome for Accounting Technicians Ireland and kept that front and centre as we embarked on a four-year roadmap. Our desired outcome, or vision, can be summarised as:

‘TO BE THE CLEAR LEADER IN THE PROVISION OF INNOVATIVE PROFESSIONAL ACCOUNTING TECHNICIAN EDUCATION ON THE ISLAND OF IRELAND THAT ADDRESSES THE CHALLENGES OF THE FUTURE, BUILDS A MORE DIVERSE AND ACTIVE MEMBER COMMUNITY, AND PROVIDES VISIBLE PATHWAYS FOR THOSE WHO WANT TO PROGRESS.’

As the Strategy discussion progressed over the course of 2019-20, two core issues became key for me:

1. The increasingly changing and challenging environment that COVID-19 and the global shutdown was creating
2. The need to refrain from allowing this dynamic of change to alter the required level of investment and commitment to our students and members

The temptation was to hit pause on the Strategy until we saw what the “new normal” looked like. We firmly believe, however, that now is the time to push forward on delivering a new Strategy for our community. Implementing this in the form of a business plan will call for an agile approach, but the commitment to deliver remains.

We want to be able to forearm and equip our members so that they can innovate and develop alongside the moving landscape. There is no doubt that change can be difficult and challenging but change can also bring vast opportunity. We believe that the accounting technician of today, possesses the ability to flex and innovate, continuing to open doors within the profession.

Technology will of course be imperative to this and is a core strategic priority for us. We need to be able to marry the convenience and advancements of technology, with the human art of debate, negotiation and anticipation. We endeavour to address this in our Strategy, outlining the development that needs to be afforded to our education system and ongoing CPD programme which will become increasingly focussed on and delivered via technology.

These are exciting and mutable times we operate in and as an organisation, we are well-placed to maximise the impact of change. We remain flexible, something which will be critical over the next four years as we move to strategic implementation.

It is often said that a vision without a Strategy remains an illusion. I firmly believe that this Strategy document outlines how, as a member organisation, we will ensure our vision is achieved. ATI possesses a diverse and dedicated executive team and I, together with the rest of the Board of Directors, are confident that the roll out of this Strategy will be effective and seamless.

Communication is key to success and I would implore that as the Strategy is designed with our members' welfare very much in mind, that you engage with Accounting Technicians Ireland at every possibility to ensure best effect is gained from our Strategy.

Sinead Donovan



COO INTRODUCTION

‘AS INDIVIDUALS, AND AS A SOCIETY, WE ARE IN UNCHARTED TERRITORY IN THE FACE OF A PANDEMIC CRISIS. WE MUST REASSESS THE PRINCIPLES AND VALUES THAT GUIDE OUR INDIVIDUAL AND COLLECTIVE RESPONSES AND THE WAY WE OPERATE IN SOCIETY. IT IS A WAKE-UP CALL TO TAKE STOCK, TO IDENTIFY WHAT’S REALLY IMPORTANT TO US. NEVER HAS THERE BEEN A GREATER NEED FOR AUTHENTIC LEADERSHIP AND FOR BUILDING MORE MEANINGFUL RELATIONSHIPS.’

Accounting Technicians Ireland is delighted to present our new Strategy 2024 plan ‘Shaping and Responding to the Environment’ which re-imagines and enhances our student and member experience. It provides a blueprint for the journey we will go on together. We are indebted to each of our contributors who took the time to share their views in relation to the future direction of our Institute.

Now is the time for an enhanced professional connected community, for working collaboratively together for the betterment of our work, our Institute and our ourselves. The Institute restates its purpose with clarity and precision: to deliver innovative professional Accounting Technician education, and to represent and advocate for a developing Accounting Technician community.

We plan to partner strategically with others in order to deliver technologically enhanced member reskilling offerings and new progression pathways within the wider post-secondary sector. It's an exciting strategy which demands that we increase the degree of agility with which we respond to the challenges of rapidly changing market places, at home and abroad.

As we develop a more flexible quick-response mindset to be ready for the challenges ahead, we will invest not merely to survive but to thrive in this knowledge intensive economy. The plan requires us to frequently upskill and reorganise ourselves internally over the next four years to ensure we deliver on our promises.

We have already adapted to our 'new normal' this year by putting our collective toes into digital waters in the areas of member webinars and student e-Assessment. We have proven that we unite in the face of adversity and do whatever it takes to provide high quality education and professional development services to our members and students.

We also plan to embrace further digitalisation across all aspects of the organisation that improves data quality, communication, modernisation of delivery and an improved user-centric experience.

With the launch of the Institute's new syllabi this September 2020, Accounting Technicians Ireland is committing to a significant reskilling agenda which will meet both current and future skills needs of enterprise and public sector, thereby enhancing the brand and value add of the next Gen Accounting Technician.

Gillian Doherty



OUR MISSION

To deliver **innovative professional** Accounting Technician education, and to represent and advocate for a developing Accounting Technician community.

OUR VISION

To be the clear leader in the provision of innovative professional accounting technician education on the island of Ireland that addresses the challenges of the future, builds a more diverse and active member community, and provides visible pathways for those who want to progress.

OUR VALUES

PROFESSIONALISM

EXCELLENCE

INTEGRITY

ACCESSIBILITY

RELEVANCE

INNOVATION

COLLABORATION

OUR STRATEGIC PRIORITIES & ENABLERS

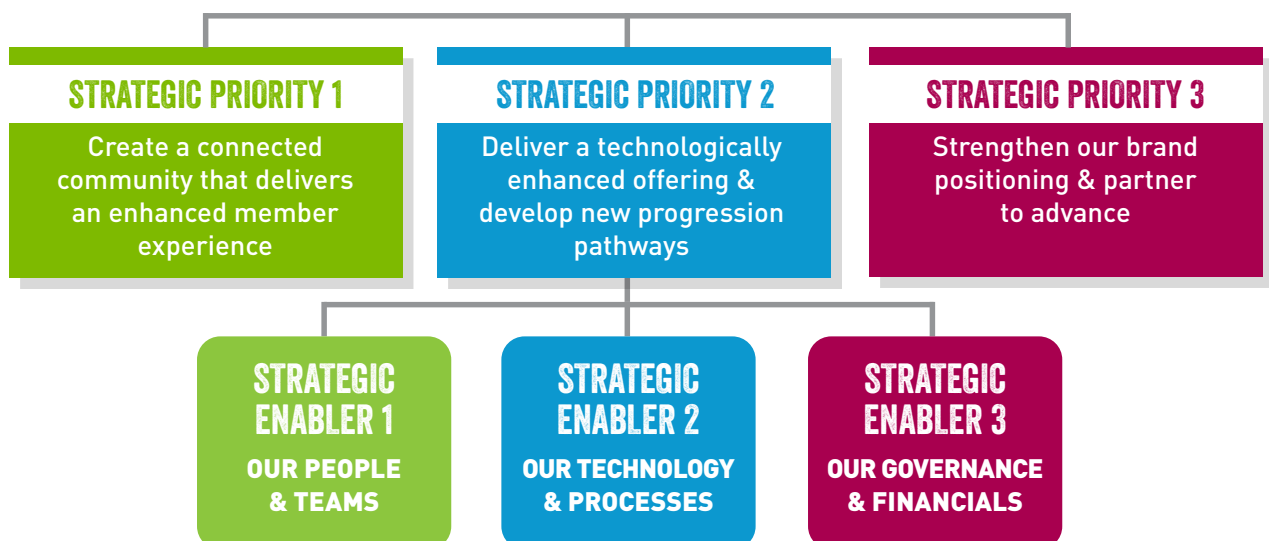


Figure 1 - ATI Strategy 2024 – Shaping and Responding to the Environment



DEVELOPING OUR NEW STRATEGY

BACKGROUND
AND CONTEXT

1.1 ABOUT US

WE ARE THE LEADING PROFESSIONAL BODY FOR ACCOUNTING TECHNICIANS ACROSS THE ISLAND OF IRELAND. FOUNDED IN 1983, WE PROVIDE AN INTERNATIONALLY RECOGNISED BUSINESS QUALIFICATION AND CONTINUOUS PROFESSIONAL SUPPORT TO OUR 10,000 STUDENTS AND MEMBERS.

We operate at the nexus of education, training, qualification and membership, all within a rapidly evolving environment. Our previous Strategy 2020 – Advancing the Profession, while largely cost neutral, saw us significantly enhance our offering in areas such as CPD and apprenticeships, improved member services, and greater accessibility.

Our emphasis on quality is critical to all we do. As well as our growing online offering, we rely on the strengths of 70 partner education providers across Ireland to deliver our programmes on the ground. The success of these relationships enables a strong regional presence for our students and members. This emphasis on quality is critical as we navigate the changes in education and training provision, alongside the evolving nature of the accounting profession itself.

In addition to partner providers and Chartered Accountants Ireland, we continue to engage with our wider stakeholder community. These relationships are at the core of our success and will continue to play a significant role in our future.



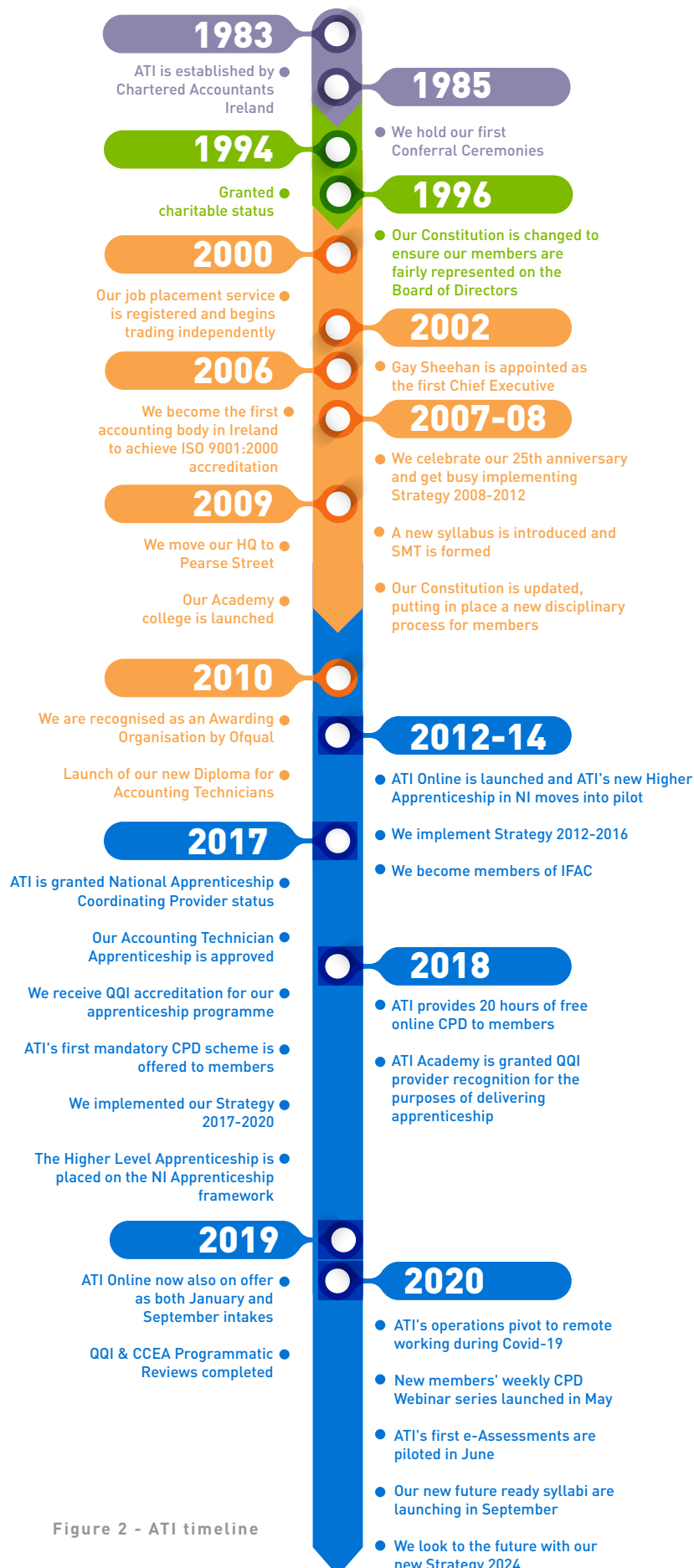


Figure 2 - ATI timeline

1.2 THE WIDER CONTEXT

The importance of the online model

We operate in a climate where membership of accountancy bodies continues to grow with over 365,000 members and a further 164,000 students across the UK and Ireland¹. As online customer expectations by students and members become more demanding, so too do their study and membership expectations. This puts increasing pressures on member bodies to deliver an online offering that can match these expectations and maintain an engaged member community.

Online engagement is also influencing the ways in which education providers facilitate easier access to education for members and students through simplified structures and pathways. From online to blended delivery models, enabled by cloud-based technology, students and members expect a seamless user experience, whether they are attending in person or virtually².

While many positives exist for this move towards online, it creates increased competition among providers for students and members, as geography is no longer a barrier to decision making. This in turn places further pressure on education providers to innovate and adapt to remain attractive and competitive.

New competencies and skills

The pace of change in the wider environment in

which students, members and the overall accounting profession operates is also accelerating. As the accounting profession evolves, so too will the required competencies and skills of accounting technicians.

Feeding this rapid rate of change are technological advances, automation, new digital platforms and other innovations. These impact the way people engage, the types of jobs being created and the nature of the work itself. Digital transformation is likely to alleviate the need for a lot of manual accounting roles, presenting a challenge in both upskilling and providing the necessary supports to professionals to enable this change.

A greater focus on developing the employability of individuals is needed, rather than simply maintaining their technical skills which in time are likely to be replaced by automation and artificial intelligence³.

Technical professionals are facing an ever-increasing pressure to learn new skills to support them in increasingly complex business environments. Many are and will continue to commit to life-long professional development and taking up cross-disciplinary opportunities. These opportunities are also likely to attract a new and more diverse cohort to the new profession.

We will see this transformation continue to evolve, as will the skills of professionals, with a shift towards adding value through transformative technology, integrated work practices and greater use of data and insight⁴.

Uncertainty during a global pandemic

At the time of developing this Plan, the Institute and society were experiencing significant uncertainty with the onset of the COVID-19 global pandemic. Strict government measures were in place to maintain social distancing, with many businesses forced to close and others needing to rapidly transform to provide business continuity. As with many organisations, we have had to respond to the disruption brought about by the pandemic, with many of the changes introduced likely to continue long beyond the crisis.

While some were welcome and have now been fast-tracked, for example the shift towards more flexible models of delivery and greater digital

transformation, others will likely have a longer-term negative impact.

The increased competition for funding is such an example, with pressure on already stretched finances across the education sector, likely to be further exacerbated. It has been a steep learning curve for every organisation, and our ability to respond was enabled by the commitment and flexibility of our staff to continue to maintain business as usual and provide additional support to our students and members.

While Strategy 2020 – Advancing the Profession, challenged the Institute to disrupt itself and develop a culture of next practice to ensure future prosperity in the dynamic and fast paced world in which we live, our new Strategy – Shaping and Responding to the Environment propels the Institute to our next stage of development in order to keep pace with the rapidly changing external environment.

¹. Financial Reporting Council (October 2019), Key Facts and Trends in the Accountancy Profession

². Solas (2020), 2020 – 2024 Future FET: Transforming Learning [awaiting launch of final strategy]

³. IBEC (2018), Smarter World, Smarter Work

⁴. International Federation of Accountants (September 2019), Future Fit Accountants for the Next Decade



**WHAT WE
STAND FOR**
MISSION, VISION
AND VALUES

2.1 OUR MISSION

To deliver innovative professional accounting technician education, and to represent and advocate for a developing Accounting Technician Community.

2.2 OUR VALUES

Our values help ensure we are all working towards a common goal and purpose. They underpin our Strategy and remain a key point of reference as we work towards our future. Forming the foundations that make our mission possible, our values determine the behaviours that inform our culture.

PROFESSIONALISM

We operate to the highest standards of behaviour and competence in all our activities, providing quality professional services for society

EXCELLENCE

We are committed to achieving excellence in all we do and harnessing the skills of our people and teams to deliver value to our students, members and stakeholders

INTEGRITY

We operate to the highest ethical standards in an open, honest and transparent manner and are accountable for our actions

ACCESSIBILITY

We provide a flexible offering that promotes inclusion and diversity, which enables the advancement of our students and members

RELEVANCE

We reflect the needs of our stakeholders in our offering and activities, operating a cycle of continuous improvement to remain relevant

INNOVATION

We seek to make things better, inspire creativity and do things differently to address business issues, improve efficiency, and drive transformation

COLLABORATION

We create opportunities, and leverage the expertise of others, to maximise the value we provide to our students, members, stakeholders and society

2.3 OUR VISION FOR THE NEXT 4 YEARS AND BEYOND

To be the clear leader in the provision of innovative professional accounting technician education on the island of Ireland that addresses the challenges of the future, builds a more diverse and active member community, and provides visible pathways for those who want to progress. This vision is imperative to enable us to deliver a superior student and member lifecycle.

By 2024, this vision will support us to ensure our developing Accounting Technician community will be:

- Recognised widely for its capable and work ready graduates
- Skilled in the use of the core technology required to effectively deliver their role
- Adaptable to the changing role requirements likely to impact how we operate
- Valued as a standalone part of the accounting profession
- A clear pathway to wider education and career opportunities
- A strong partner in the delivery of highly regarded innovative post-secondary education



Figure 3 - ATI Student & Member Lifecycle



**WHAT WE WANT
TO ACHIEVE**
STRATEGIC PRIORITIES
AND OBJECTIVES

OUR NEW STRATEGY IS FOUNDED ON THREE STRATEGIC PRIORITIES:

STRATEGIC PRIORITY 1

Create a connected community that delivers an enhanced member experience

STRATEGIC PRIORITY 2

Deliver a technologically enhanced offering & develop new progression pathways

STRATEGIC PRIORITY 3

Strengthen our brand positioning & partner to advance

We will expand on each of the priorities - outlined above - and define the objectives that will enable us to achieve them. Each objective serves as an anchor point on which we will build and evolve over the course of our Strategy.



3.1 SP1: CREATE A CONNECTED COMMUNITY THAT DELIVERS AN ENHANCED MEMBER EXPERIENCE

Our students and members are at the heart of our Institute. Indeed, membership is fundamental to our function and future sustainability. The needs of our members are changing, and we must continue to transform and modernise to remain relevant. We need to address the differences in the requirements of various cohorts of members and respond to the broader digital transformation impacting their expectations.

Our ability to advance and grow relies on our ability to connect with our members and ensure our offering supports them to be competent, confident and capable for the work environment. We recognise the importance of improving engagement with our current members, as well as attracting new members over the life of this Plan.

To achieve this priority, we will:

3.1.1 Build an active ATI network that strengthens linkages where members feel connected to and supported by a professional community. This includes introducing relevant initiatives and events, personalised content, multi-directional exchange and improved services that address the challenges they face now and into the future

3.1.2 Represent the community of accounting technicians, promote professional standards for technical competence and provide an objective voice for our professionals that is trusted by industry, the public service and society

3.1.3 Improve members' knowledge and awareness of the changes to the profession and build their capacity to respond through targeted initiatives that identify gaps, ensure members skills are up-to-date, support members to contribute effectively in a work environment, and to seize the opportunities that enable career progression

3.1.4 Grow our member base and diversity through improved recruitment, increased conversion, and targeted retention initiatives that recognise, engage, support and reward accounting technician professionals

THE TARGET OUTCOMES FOR THIS PRIORITY WILL BE:

- We have an active member community across the island of Ireland equipped with up-to-date thinking and practice delivered in a manner that provides an experience that corresponds with how members wish to connect and engage at all levels
- Our student and member experience is enhanced by a strong interactive forum, allowing members to communicate with each other and to make valuable connections, thereby creating a sense of pride and belonging that improves their overall well-being
- Greater clarity and articulation of the Chartered Accountants Ireland relationship



3.2 SP2: DELIVER A TECHNOLOGICALLY ENHANCED OFFERING & DEVELOP NEW PROGRESSIONS

From advances in technology to business model disruption, increased regulation to greater uncertainty, there is no doubt that today's economy is rapidly changing. This is resulting in a redefinition of the role of the accounting professional and ultimately the environment in which we operate.

There is also increasing pressure on professionals to deliver beyond their technical competence, with greater focus on transferable skills that enable more flexibility in the workplace. Such change brings with it a number of challenges for our students and members including acceptance, adaptation and adoption of such change.

Over the life of this Plan, we must be part of the wider reform of the tertiary education sector, which promotes the essential skills attained from post-secondary education as a route to skilled employment, as well as higher education. This reform will result in a greater share of school leavers choosing further education or apprenticeship as their first destination and a growing number of people in employment upskilling through further and higher education routes.

We must respond to these challenges in order to maintain relevance, support career progression, and advance the accounting technician profession.

To achieve this priority, we will:

3.2.1 Enable progression through the delivery of new qualifications specific to accounting technicians and create alternative methods of progression beyond the accounting technician qualification for those who wish to pursue them (i.e. degree level qualification)

3.2.2 Deliver a more accessible technologically enhanced offering that facilitates lifelong learning and promotes diversity through greater use of interactive and engaging blended models of delivery

3.2.3 Update our education offering to ensure it addresses the practical skills, knowledge and competencies required to address workplace challenges and the changing requirements of accounting professionals (i.e. Robotic Process Automation, Artificial Intelligence, Blockchain, Communications, Teamwork etc.)

3.2.4 Extend our current CPD and upskilling offering to address the skills gaps that exist among accounting technician professionals at each stage of their career to maintain their relevance in the workforce and support continued career advancement

THE TARGET OUTCOMES FOR THIS PRIORITY WILL BE:

- We fully understand and embrace the challenges of tomorrow through our updated education offering that addresses the changing requirements of accounting professionals
- Our offering is digitally transformed to provide new ways of engaging with a more diverse cohort of learners through up-to-date content delivered via traditional and flexible learning models. These models strengthen the skills and competencies of students and members through enhanced qualifications geared towards employability, encourage life-wide learning, and provide clear pathways for those who wish to advance

4 SP3: STRENGTHEN OUR BRAND POSITIONING & PARTNER TO ADVANCE

The Accounting Technicians Ireland brand is recognised by our core stakeholders and community as a professional organisation with an exemplar apprenticeship offering. Whilst we have an all-island presence, enabled through strong partnerships with over 70 further education and training providers, the visibility of our offering as a career choice or progression pathway does not have adequate reach amongst our target market.

We remain less well-known as a brand, resulting in the potential of the accounting technician qualification not being fully realised and impacting on our ability to continue to grow as part of the wider post-secondary education system. In line with the direction of the wider further education and training space, we must build a more powerful identity with potential learners and adapt to the evolving needs of our stakeholders in order to advance as an Institute.

This strategy requires further extension to the positive relationships and partnerships enjoyed at present. Now more than ever the requirement exists to work together to sustainably deliver more.

To achieve this priority, we will:

4.1.1 Strengthen the Accounting Technicians Ireland brand through targeted communication initiatives that address existing issues around perception and communicate the true potential of the ATI offering, ensuring it is understood by and attractive to students, members, employers and other stakeholders

4.1.2 Seek partners with complementary capabilities to share digital infrastructure, gain access to new geographies, address sustainability challenges and to reduce risk in addressing the complexities being navigated by the profession considering the rapidly transforming digital landscape

4.1.3 Deepen our engagement with stakeholders by connecting with them in a more structured way to improve their awareness of the ATI offering, share lessons learned, access and provide expertise, understand their needs and address any gaps identified

THE TARGET OUTCOMES FOR THIS PRIORITY WILL BE:

- ATI is recognised as a vibrant body whose views are respected and sought by industry and society. The role of ATI qualified professionals is recognised and valued by our stakeholders and the wider public, through improved communication and engagement, in an increasingly digitised and connected environment
- Our position within the sector is enhanced through the growth of a more diverse student and member base, closer links with employers and global networks enabled by strategic partnerships and enhanced engagement



**HOW WE
WILL DO THIS**
STRATEGIC
ENABLERS

TO DELIVER ON THIS AMBITIOUS STRATEGY, WE WILL NEED TO MAKE THE MOST OF OUR INTERNAL CAPABILITIES AND BUILD OUR ORGANISATIONAL CAPACITY.

As an Institute we must focus on existing opportunities, whilst evolving to become a more strategically focussed organisation that is flexible and responsive.

Taking this into account, we have identified three critical enablers that will support us in achieving our Plan.

STRATEGIC ENABLER 1

**OUR PEOPLE
& TEAMS**

STRATEGIC ENABLER 2

**OUR TECHNOLOGY
& PROCESSES**

STRATEGIC ENABLER 3

**OUR GOVERNANCE
& FINANCIALS**

5.1 SE1: OUR PEOPLE & TEAMS

One of the reasons often cited for failure to execute a strategy is the lack of people support. This strategy involves change, which is not deliverable unless our people are on board and willing to help. The successful execution of this plan relies on addressing the skills and expertise gaps that exist within the Institute and building a strong team mentality that drives the mission.

Over the life of this strategy, our ability to be agile in response to external changes and ongoing challenges will be critical to our continued success.

To enable this Strategy, we will:

5.1.1 Establish the level of change readiness within the ATI team to adapt to a new business model and invest in targeted initiatives that support leadership and management advancement

5.1.2 Provide tailored training and development opportunities to staff at all levels to ensure they have the necessary skills and competencies to deliver their role effectively and adapt to changing requirements

5.1.3 Revise the organisational design to align with the strategic direction of the Institute and to ensure resources are appropriately aligned to priorities, promote employee well-being and enhance performance

5.1.4 Invest in the resources that will address the critical skills gaps that exist in the current structure which will enable the delivery of the ATI vision

5.2 SE2: OUR TECHNOLOGY & PROCESSES

At a time of intensified business transformation and change, implementing an effective strategy can be increasingly complex. Technology enables strategic ambition. It helps to extend the range of possibilities and provides the means by which significant elements of strategy can be achieved.

While digital transformation of our infrastructure is required, all modernisation efforts must add value, enhance member experience and make life easier for our employees. The advancement of our technology, systems and processes will involve a significant cultural shift for staff, students and members that will need to be supported.

To enable this Strategy, we will:

5.2.1 Review the operating model to ensure effective policies, processes, procedures and reporting arrangements are in place to provide the best service possible to students, members, staff and other stakeholders

5.2.2 Embrace digital changes across all aspects of the organisation that improve data quality, communication, modernisation of delivery and provide an improved user-centric experience

5.2.3 Invest in the tools and the processes that emphasise accountability and facilitate the collation of data, metrics and management information that enables strategic data-informed decision making

5.2.4 Advance the overall delivery infrastructure and re-configure related processes to drive efficiency, breakdown silos, and become more effective in delivering on the functions of the Institute

5.3 SE3: OUR GOVERNANCE & FINANCIALS

Accounting Technicians Ireland is governed by a Board of Directors who have responsibility for the oversight and strategy of the Institute. The day-to-day running of our Institute is led by the Chief Operations Officer, with support from a committed management team and dedicated staff.

The preparation of a strategy involves trade-offs, and therefore requires clear and transparent decision-making that makes the best use of resources for the benefit of our stakeholders. Investment is required to ensure the successful delivery of this plan. It is essential that our strategy and structure align to increase accountability and mitigate risk.

This requires greater clarity around the current governance arrangements. It relies on the Board and management team working together to assess risk, inform decision making, evaluate effectiveness and drive improved performance.

To enable this Strategy, we will:

5.3.1 Identify the opportunities that exist to grow income and profit levels to enable greater ongoing investment in the improvement of ATI operations for the benefit of our students, members and other stakeholders

5.3.2 Improve transparency and enhance accountability through the evaluation and communication of investments and related decisions to ensure outcomes, including value for money, are considered and achieved

5.3.3 Establish appropriate structures for strategic engagements and partnerships that promote good governance, provide direction and enhance the Board's ability to exercise good oversight

5.3.4 Enhance the overall risk management framework adopted by the Institute to include an agreed statement of risk appetite, raise risk awareness and achieve greater assurance over the management of risk



IMPLEMENTATION

STRATEGIC IMPLEMENTATION FRAMEWORK

People want to know where they are going and how they will get there. Creating a clear, easily understood implementation framework that visualises the priorities, actions, accountability and timelines makes everyone part of the journey.

The following figure provides a high-level summary of the governance and management structure, the relationship with stakeholders and the tools necessary to support the tracking, monitoring and reporting of progress.

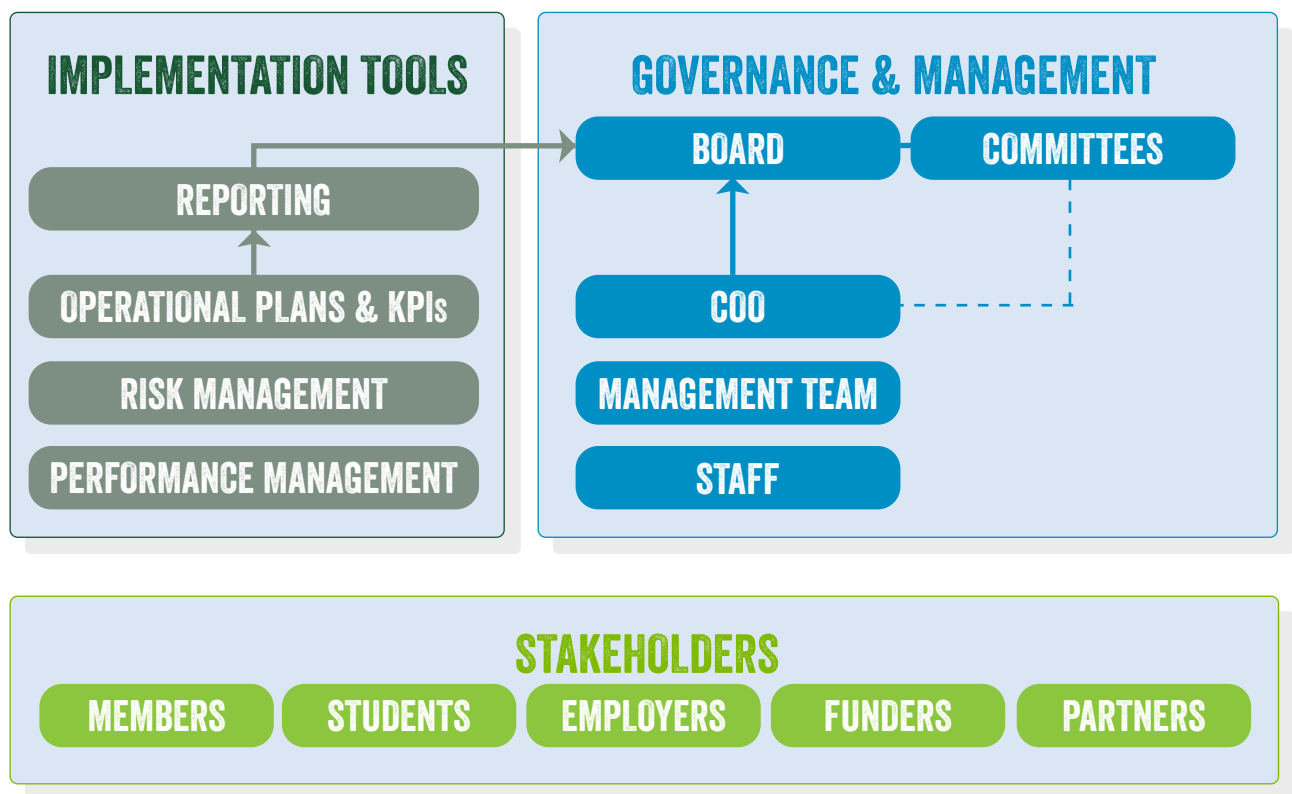


Figure 4 - Strategic Implementation Framework

AGILITY AND FLEXIBILITY AS WE MOVE AHEAD

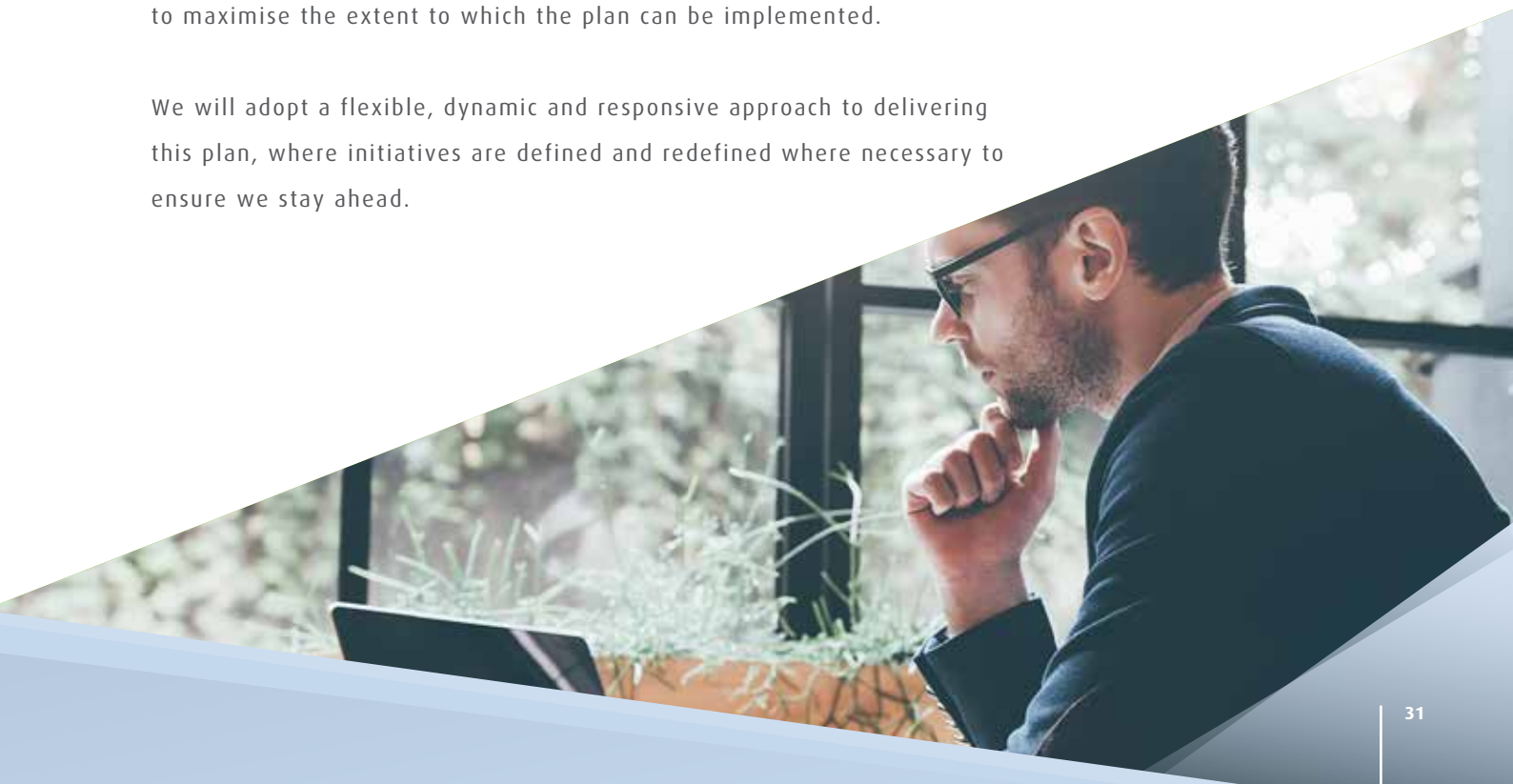
The detailed operational plans which will follow, will include key performance indicators (KPIs) that will be tracked and monitored over the life of the plan to ensure we remain on track and deliver results.

In light of the uncertainty resulting from the emergence of COVID-19, we will prioritise our actions to ensure the best use of resources. We will adopt an agile approach to opportunities that present as a result of the current climate where they are aligned to our values and further the ambition of the Institute.

Unlike Strategy 2020 – Advancing the Profession that was delivered on a predominantly cost neutral basis, Strategy 2024 – Shaping and Responding to the Environment requires a more significant level of investment in order to achieve the ambitious priorities set out for the Institute.

Given the unprecedented and unpredictable nature of Covid-19's impact on the economy, the availability of funding required to implement this strategy will be particularly sensitive to factors often outside our control. Successful implementation of any strategic plan requires good scenario planning. In the context of Covid-19, this is more important than ever. The key assumptions underpinning the selection and timing of particular strategic actions will require re-testing and re-validation on an ongoing basis in order to maximise the extent to which the plan can be implemented.

We will adopt a flexible, dynamic and responsive approach to delivering this plan, where initiatives are defined and redefined where necessary to ensure we stay ahead.





APPENDICES

APPENDIX 1: ACRONYMS

The following table provides a breakdown of the acronyms used throughout the Strategic Plan.

AAT	Association of Accounting Technicians
AI	Artificial Intelligence
ATI	Accounting Technicians Ireland
CIPD	Chartered Institute of Personnel and Development
CPD	Continuing Professional Development
FET	Further Education and Training
HEA	Higher Education Authority
IAASA	Irish Auditing and Accounting Supervisory Authority
IBEC	Irish Business and Employers Confederation
IFAC	International Federation of Accountants
NFQ	National Framework of Qualifications
RPA	Robotic Process Automation
SDG	Strategy Development Group
QQI	Quality & Qualifications Ireland

APPENDIX 2: STRATEGY DEVELOPMENT GROUP

In order to enable the development of the strategy, Accounting Technicians Ireland established an internal Strategy Development Group (SDG). This group was responsible for developing an effective and robust strategy that will not only serve to support continuing growth but will bring real results to students, members and employers at regional and national level. This group were appointed by and responsible to ATI's Board of Directors, and is composed of representatives of members, employers, education specialists and senior management of ATI.

The membership of the SDG comprised the following:

Name	Role
Sinead Donovan (outgoing) & Mary Gleeson (incoming)	Chairperson (President)
Dargan FitzGerald	Chair of Education
Charles Larkin	Education Board (Policy and Research) and Board Member
John J. McElhinney	Chair of Member Services
Bernadette Keating	Chair of Tech Working Group and Industry Representative
Barry Smith	Education Specialist
Barry Dempsey	Chief Executive Chartered Accountants Ireland
Sophie Ellis	Member Representation (Gen Z 18 – 24 years)

The SDG is supported by members of the ATI management team:

Name	Role
Gillian Doherty	Chief Operations Officer
Mike Burger	Head of Education
Christine Mulcahy	Finance Director
Karen McQuillan	Operations & Events Manager
Alexandra Mulrennan	Head of Marketing and Communications

Other members of the management team also provided support to the SDG during the development of this Strategic Plan.

APPENDIX 3: STRATEGIC PLANNING PROCESS

The strategic planning process used in developing this Strategic Plan was built around a rigorous framework to ensure that the priorities and objectives of the strategy are designed to address the needs of ATI.

In addition to project planning, initiation and ongoing project management, there were various key phases in the strategic planning process which are summarised in the table below:

Phase	Description
Documentation Review	A detailed review was undertaken of a significant number of related documents provided by Accounting Technicians Ireland. Additional documents were reviewed following suggestions from stakeholders during the consultation phase. The purpose of this review was to gain an understanding of the environment in which Accounting Technicians Ireland operates and the challenges that exist within it. This review was undertaken in the period from January to March 2020.
Stakeholder Consultation	Key stakeholders were engaged through a combination of consultation workshops, one to one meetings, phone calls and a survey. This engagement considered the valuable views, opinions and insights of internal and external stakeholders. A benchmarking exercise was also conducted as part of this phase. These consultations took place between February and March 2020.
Analysis & Options	Based on the outputs from Phases 1 and 2 above, considerations were consolidated into a number of strategic options covering drivers of change, impact on ATI in the sector and/or ATI structure and risks. Input from the Strategy Development Group was sought after the initial drafting of the strategic options in order to refine and prioritise. Once the strategic options were refined and priorities agreed, a further session with the SDG was completed to establish the strategic priorities to be included in the ATI Strategic Plan 2021 – 2024. ATI were provided with a model to consider and populate for each priority and its impact on the organisation, with high-level underlying cost models used to inform the decision-making process.
Preparation of Strategy	The above outlined phases informed the development of the final strategic plan. In order to prepare the strategy document, consultation outputs, environmental analysis, strategic options, funding and resources and the strategic priorities were all considered. A draft of the plan was presented to the SDG for their consideration. The feedback from this group was incorporated into the plan before a final Strategic Plan was issued for approval and acceptance by the ATI Board of Directors in June 2020.

The approach to this strategic planning process was completed from January to April 2020 with the final Strategic Plan agreed by the ATI Board in June 2020.

The following figure summarises the key stages involved in arriving at the strategic priorities and strategic enablers outlined in this Strategic Plan.

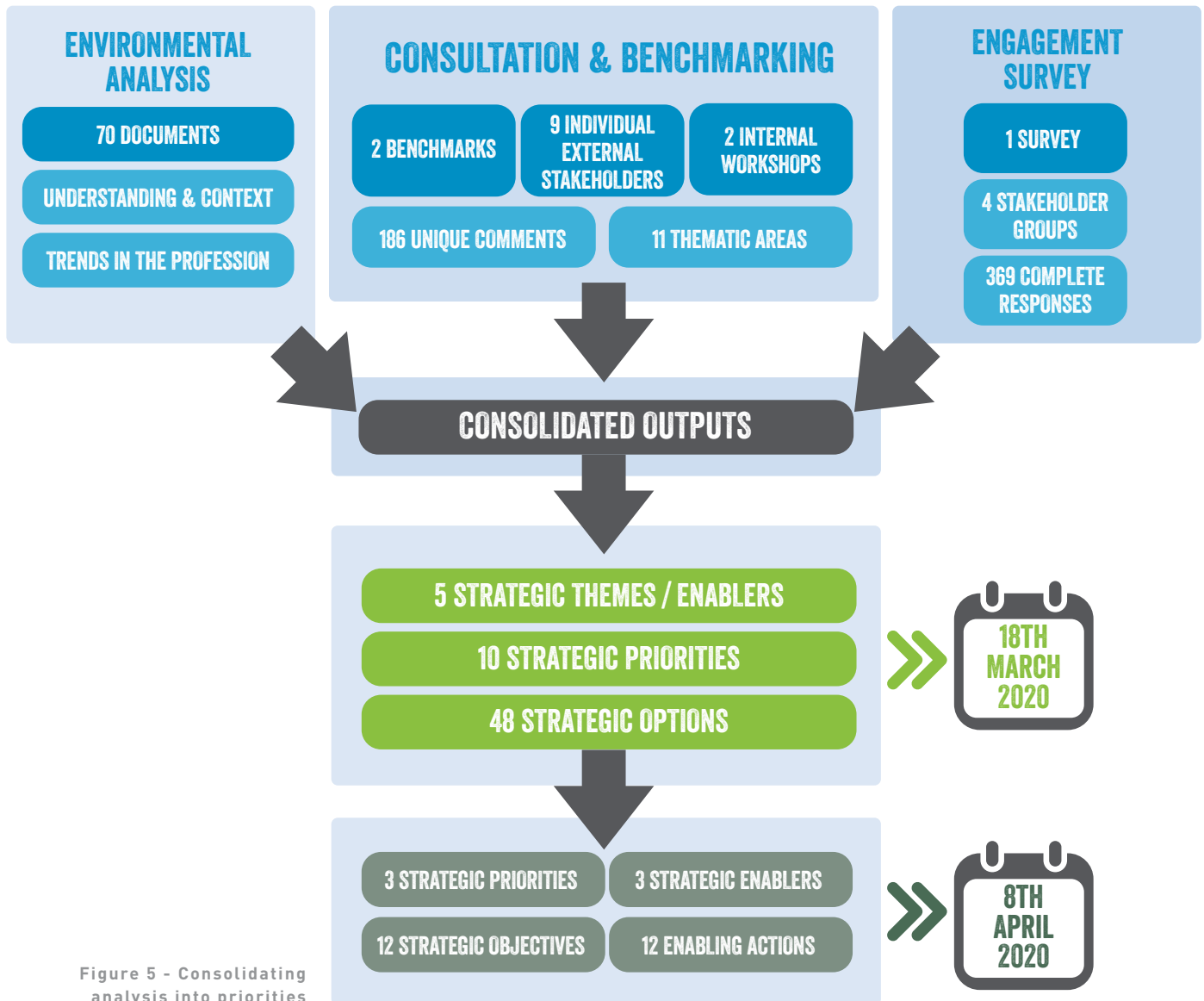


Figure 5 - Consolidating analysis into priorities

The approach to this strategic planning process was completed from January to April 2020 with the final Strategic Plan agreed by the ATI Board in June 2020.

Stakeholders Consulted

A summary of the stakeholders consulted as part of this process is set out below:

Stakeholder Group		
ATI Board	ATI Members	Department of Education & Skills
ATI Strategy Development Group	Chartered Accountants Ireland	Cork Education & Training Board
ATI Executive	SOLAS	Colleges NI – Southern Regional College (SRC)
ATI Staff	Employers	Department for the Economy (NI)
ATI Students	IBEC	The Wheel

Stakeholder Survey

As part of the strategy development process, a survey was designed and distributed online to a wide variety of stakeholders including Students, Affiliate Members, Members, Fellows, Employers and Accounting Technician Ireland (ATI) staff in February 2020. This survey was developed by Mazars, and approved by ATI, following an initial round of consultations with internal and external stakeholders. It was designed to get maximum insight into a number of thematic areas which had arisen as part of the consultation process.

This survey examined the following areas from the various stakeholders' perspective:

- ATI's Mission, Vision and Values
- Strategy 2021 – 2024 Development
- Future Challenges and Priorities

There were 598 respondents to the survey. Of these 369 people completed the survey and 229 partially completed the survey. Only completed responses (369) were used for analysis.



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