

**Program Evaluation**

**Quality of program materials (as evidenced by relevance, substance and readability)**

5	4	3	2	1	0	<b>Avg</b>
9	8	4	0	0	0	<b>4.2</b>

**Effectiveness of the discussion leader: Knowledge of subject matter**

5	4	3	2	1	0	<b>Avg</b>
11	7	3	0	0	0	<b>4.4</b>

**Effectiveness of the discussion leader: Presentation skills**

5	4	3	2	1	0	<b>Avg</b>
11	8	2	0	0	0	<b>4.4</b>

**Effectiveness of the discussion leader: Enthusiasm for the program**

5	4	3	2	1	0	<b>Avg</b>
14	6	1	0	0	0	<b>4.6</b>

**What characteristics did you appreciate most in the Discussion Leader? Suggest ways he/she could improve his/her effectiveness.**

The real world stories about his clients kept it interesting, entertaining, memorable & enjoyable. Bart did a great job bringing to life what can be dry, boring concepts by giving real-world examples which is helpful when you are learning. He was extremely effective and I can't think of any way he could improve, it was great

Bart told stories that were good real-life examples and kept the class interesting. He was very knowledgeable about the subject matter.

His enthusiasm for the subject matter was on point.

The instructor had a very upbeat personality and was enthusiastic about the topics which made the presentation better. I was disappointed that we didn't get to do many of the case studies.

Personable, good stories

Passionate about his work.

Bart did a decent job. However, he focused too much on stories that made him seem impressive, and not enough on the actual topics. I felt like we glossed over the materials. We didn't work through any of the case studies either, so I'm not sure whether I can duplicate the principles.

Tried to enlighten the presentation and subject material with his own personal situations/experiences with clients.

The way Bart related many tax issues to actual client situations was engaging and kept things relevant.

I appreciated that Bart was willing to reply to questions from participants.

He was great. I would take one of his courses again

specific examples related to topics discussed

his experiences, and his openness when he did not know an answer.

I enjoyed his stories / insight as it related to the material.

I appreciated the experiences the instructor shared with us. This allowed us to apply what we were learning and helped to keep the class more entertaining.

He made a dense amount of material interesting.

I enjoyed the discussion leader's real life examples

I appreciate the different aspects he was able to give, based on his own clients. Also, by explaining his background.

Bart keeps the class interesting.

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**Program Evaluation**

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**Please describe any other observations or recommendations that you may have about the program.**

Hotel was very accomodating with transportation and food was great. Enjoyed the group activities and networking with the other attendees. My only suggestion...move the class into the city of Chicago! The binders were very extensive & helpful and I'm very glad to have them as a reference going forward

I would have liked to go into more depth about certain partnership and S corp issues such as basis.

The amount of required experience for the subject matter seemed off. I have been involved in three tax seasons (one as an intern) and I didn't really encounter anything new.

Good material

I'd rather have a 5-day program with half-days. That would give us more time to network with each other, get some work done, and get enough sleep. I felt rushed.

Maybe have the individuals perform small cases, etc. to help keep us involved in the presentation and to increase our knowledge and understanding.

It covered a broad range of topics but did not delve very deeply into many areas. It was a good review or introduction to topical areas.

I liked that the program encouraged the participants to get to know eachother.

None, It was great.

great, covered all material

Closer to downtown

Focused too much on C Corporations

Since I did attend the level 1 staff training, and we had the same instructor in level 2 as in level 1, the only recommendation I would have is to allow the students the opportunity to learn from another CPA. This way we can take the knowledge from multiple instructors, back to our firms. It is always nice to have multiple points of view, and different client stories.

None

**Number of months you have been in public accounting**

	<u># Responses</u>
0 - 12	7
12 - 24	7
24 - 36	1
Over 36	6

**Topical Evaluation**

**Closely-held corporations: Rating**

<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>0</b>	<b>Avg</b>
8	7	5	1	0	0	<b>4.0</b>

**Closely-held corporations: Time Spent**

	<u># Responses</u>
OK	17
Too Little	2
Too Much	2

**Partnership Taxation: Rating**

<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>0</b>	<b>Avg</b>
7	11	3	0	0	0	<b>4.2</b>

**Partnership Taxation: Time Spent**

	<u># Responses</u>
OK	16
Too Little	5

**Fringe Benefits: Rating**

<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>0</b>	<b>Avg</b>
5	7	8	1	0	0	<b>3.8</b>

**Fringe Benefits: Time Spent**

	<u># Responses</u>
OK	15
Too Little	3
Too Much	3

**If you rated topics low, indicate any that were not relevant to your needs:**

- Closely-Held Corporations
- Closely-Held Corporations,Fringe Benefits
- Fringe Benefits

**If you rated topics low, indicate any that were too elementary:**

- Closely-Held Corporations
- Closely-Held Corporations,Partnership Taxation
- Fringe Benefits
- Partnership Taxation

**If you rated topics low, indicate any that were too advanced:**

- Closely-Held Corporations
- Closely-Held Corporations,Partnership Taxation
- Partnership Taxation

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**Topical Evaluation**

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**Observations about the course:**

Great course, covered a lot of ground. I have never done business returns (I'm a month on the job) so my only knowledge is textbook and from my college classes (for the most part). So many of the topics went over my head a bit yet I know I also learned many things and with experience the knowledge will come. For someone like me, I'm very glad to have the reference binders that I can refer to and study more in the future.

The topics were well-done, but I would have liked to spend a little more time on partnerships, and a little more time on S corps. Partnerships should have been moved to the beginning, as time was running low toward the end of the training session.

Great course, but I feel it is directed much more towards a brand new accountant rather than one who has been through a few tax seasons already.

It was a good course and refreshed topics I was already familiar with. I don't think it was more informational or better than other programs that I could have gotten locally. I was hoping for more case study time.

Most of the compliance work I focus on is passthrough and individual taxation. I would like to have a more in-depth understanding of the treatment of partnership special allocations and structure with the intent to maximize the positive outcome for the partners.

Subject material is not ery exciting...however instructor did his best to make it somewhat informative and entertaining.

Covered a broad range of topics in the time allotted; benefit of exposure to many areas but not much time for detailed development.

The course had a lot of material. I wish we spent the three days only going over partnerships and corporations.

Great Course. I will be attending next year if it is offered

could spend more time on LLC's

Should have covered more days

Overall the course was very informative and enjoyable

There was a lot of information in a 2.5 day course. Personally, I would have liked to focus in more on specific items of each section, and really be able to spend some quality time on each section. This may be possible by limiting the amount of information in each section. We were unable to really get into the detail of any one topic.

It was great.

**Please suggest any additional topics that would be relevant to someone at this state of their career:**

Depreciation, M-1 adjustments

Maybe a more advanced look into topics already included.

More challenging personal taxation topics such as hedge fund K-1 compliance, multi-state filings, and foreign information return reporting.

Nothing else I can think of.

The topics we went over were very relevant.

Estates and Trusts

profits / losses - show how they get reported on K-1's and how it affects personal returns

Need to spend more time on partnerships and S Corps

Consolidated C Corporations, State Taxation and common differences between Federal and States, Client Communications, Career Building Blocks (i.e. Traits that firms look for in growth of their employees).

None

**Evaluation of Facility**

**Meeting Room**

<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>0</b>	<b>Avg</b>
8	11	1	0	1	0	<b>4.2</b>

**Sleeping Room**

<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>0</b>	<b>Avg</b>
3	7	9	1	1	0	<b>3.5</b>

**Group Meals**

<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>0</b>	<b>Avg</b>
8	6	5	2	0	0	<b>4.0</b>

**Refreshment Breaks**

<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>0</b>	<b>Avg</b>
9	6	6	0	0	0	<b>4.1</b>

**Suggest ways to improve the administration of the program:**

Went smoothly & they took good care of us. I would love the setting to be in downtown Chicago but that's just so we could go into the city on our off night. This has nothing to do with the actual program but just a "want" item more so than a "need"

A new facility in Chicago could be helpful.

Very well planned, and smoothly executed,

Rooms were awful small.

It was well-run and seemed to be a smooth operation.

None

none

The facility should be closer to other restaurants and attractions in case we want to explore other food options.

N/A

None

**Sunday Night**

**Program Organization**

5	4	3	2	1	0	<b>Avg</b>
9	9	2	0	1	0	<b>4.2</b>

**Facilitator Skill Level**

5	4	3	2	1	0	<b>Avg</b>
11	8	2	0	0	0	<b>4.4</b>

**Exchange of Ideas and Information**

5	4	3	2	1	0	<b>Avg</b>
8	12	1	0	0	0	<b>4.3</b>

**Subject Matter of Discussion**

5	4	3	2	1	0	<b>Avg</b>
6	12	2	1	0	0	<b>4.1</b>

**Key Learnings Applicability to the workplace**

5	4	3	2	1	0	<b>Avg</b>
5	6	7	1	2	0	<b>3.5</b>

**Able to connect/meet/network with AGN members**

5	4	3	2	1	0	<b>Avg</b>
12	8	1	0	0	0	<b>4.5</b>

**Overall program satisfaction**

5	4	3	2	1	0	<b>Avg</b>
11	9	1	0	0	0	<b>4.5</b>

**Was this session beneficial to you?**

	<u># Responses</u>
No	1
Yes	20

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**Sunday Night**

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**What was most beneficial?**

Getting to know our fellow AGN members in a relaxed setting.

Getting the opportunity to meet people from other firms. I don't usually enjoy icebreaking activities, but this one was pretty good.

It was nice to meet the other AGN members and break the ice.

I enjoyed the ice breaker session/game to loosen people up and let everyone get to know each other easier. The cake decorating I know is a team working lesson, but didn't think it was necessary.

Ice Breaker, Networking

Networking

Networking

Basically getting to meet everyone and learn more about one another in a relaxed environment.....helped make the remainder of the training more enjoyable since I knew the others and could joke around/discuss topics/etc.

It's good to walk into the session Monday morning and see familiar faces. It is a helpful introduction to other participants, even if we all aren't the most socially adept people!

It was beneficial to get a change to meet with the other participants before the meeting time the next morning.

Meeting other people who would be at the conference in advance

Meeting other people participating in the program

meeting the others in this group level

Good ice breaker. Led to great interaction with other firms over the next 3 days

Games really helped to break the ice. Helped to bring our different personalities in the group.

A little cheesy but good for building relationships.

It provides us with a chance to practice our networking skills or for some of us it forces us to network for the first time  
NA

Meeting all the members.

**What was least beneficial?**

How everyone won candy in the cake decorating contest. Take a stand!

There was a discrepancy of when it started between 6:15 and 6:30.

The cake decorating contest

Alcohol

The "tell a story about another individual's name" was the least beneficial.

Nothing

none

Cake decorating seemed wasteful

Beer was terrible

cake exercise

The beer

N/A

The cake.

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**Sunday Night**

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**General comments:**

The cake decorating was challenging b/c I'm not creative but it was really fun to see what everybody came up with and how different the ideas turned out to be. Enjoyed the food & fellowship

Overall a positive experience. The instructor was good, as was the food.

Overall a good experience.

Overall, this was good.

Definitely worth going to....those who did not attend missed out on getting to know the members of the group and probably felt out of place the remainder of the training.

It's a good meet and greet, and a low-pressure way to meet fellow participants.

Although the additional requirement may cut into the participant's weekend, I believe it is necessary and beneficial.

A lot of fun. It was a great experience

great way to socialize

great time

Need better cake decorations

good time

N/A

It was a lot of fun meeting all the members.

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**Monday Night**

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**Quality of food/service:**

5	4	3	2	1	0	Avg
8	9	3	0	1	0	4.1

**Facility**

5	4	3	2	1	0	Avg
5	12	3	0	1	0	4.0

**Comments:**

Food was fantastic. We had a nice dinner

I really enjoyed the restaurant and getting to spend time with the other attendees.

It was exactly as expected.

I understand the networking aspect of this, but wasn't sure why it was required. We were already eating breakfast and lunch together.

Very enjoyable

The group dinner out was fun and a great chance to eat good food and get to know some each other a little better.

It was nice to have an event coordinated to interact with other participants.

Great food

none

It was good, but both lunch and dinner were the same sorts of food (ie various italian)

N/A

It was a lot of fun.