

Bookkeeper Advisory Group Meeting Summary

8 September 2006

A Bookkeeper Advisory Group (BAG) meeting was held on 8 September 2006 at the Tax Office in Hurstville, NSW.

Items discussed at the meeting included:

Bookkeeper Advisory Group Charter

The Tax Office tabled the charter for the BAG. All member feedback was considered in developing the final version of the charter. Members of the BAG voted unanimously to accept the charter for the BAG and to operate under the guidelines set out in the charter from the next BAG meeting. The BAG charter will be tabled at the ATO Tax Partitioner Forum (ATPF) at the 10 November meeting for formal endorsement. Once endorsed, the Charter will be published on the Tax Office website

ATPF meeting

Members were given an overview of the recent ATPF meeting. At this meeting many discussions took place that related to bookkeepers and a possible strategy for engaging bookkeepers through providing targeted access to Tax Office services. BAG members were advised of a possible bookkeeper portal which could provide access to some client information via a portal-like application. Whilst it will be a valuable tool for bookkeepers, it will be a limited view and contain limited functions when compared with the Tax Agents Portal.

Bookkeeper Research

The Tax Office, with the assistance of Recognised Professional Associations and BAG members, has co-designed research into bookkeepers who provide BAS services. Interim findings were presented to members of the BAG from the qualitative stage of the research. Members were given the opportunity to contribute to the quantitative stage of the research, scheduled to begin in October 2006. This quantitative stage will involve 2000 surveys being sent to working bookkeepers in the field.

Bookkeeper Workshop

Members participated in a workshop to identify personas within the bookkeeper profession. Members were asked to develop personas for an employed bookkeeper and a BAS service provider. These personas will be further developed with the assistance of BAG members for future bookkeeper workshops, and may be used to assist in the development of products, services and communications for bookkeepers.

Electronic products and services

The Tax Office is continually looking at ways to improve the information to the Bookkeeping Essentials page on www.ato.gov.au. The Bookkeeping Essentials page has received over 75 000 hits since the launch in February.

BAG meetings are hosted by the Tax Office and are presently held quarterly pending a Tax Office review of forums. Membership consists of representatives from the Tax Office; Recognised Professional Associations; bookkeeper representative organisations; franchises; and bookkeepers.

The next BAG meeting is scheduled to be held on 29 November 2006.