

Awards Selected by the Chapter Coordinating Committee

Chapter Awards

The Chapter Coordinating Committee Steering Subcommittee is responsible for selecting the recipients of the following awards: Outstanding Small Chapter and Outstanding Medium Chapter. From time to time, a Most Improved Chapter Award may be presented.

Outstanding Chapter Award recipients will be selected on the basis of information provided on the Outstanding Chapter Award Entry Form.

Most Improved Chapter: Selected when appropriate to acknowledge a chapter that significantly advanced its services to members and the community in a given year.

Presentation: All chapter awards will be presented at the TXCPA Annual Meeting with sufficient information about achievements to acknowledge the chapters receiving the award.

Recognition of Chapter Award Recipients: The chapter president whose leadership was instrumental in the chapter's receipt of the award will receive a plaque. The chapter will receive appropriate recognition.

All award recipients will be acknowledged by a brief account of accomplishments that resulted in receiving the award. Awards and their recipients will be publicized in appropriate TXCPA publications.

**YEAR-END REPORT FORM
OUTSTANDING TXCPA CHAPTER AWARD**

DUE: MAY 20, 2025

This form constitutes the chapter annual report.

Entry form must be received at TXCPA by midnight, May 20, 2025, to be considered for an Outstanding Chapter Award.

Please complete this form and email to Rori Shaw (rshaw@tx.cpa).

By sending it to TXCPA, the chapter agrees to allow the completed form to be posted on the Internet after it is received.

Chapter: Austin

President: Larry Stephens

President email: lgstephens219@hotmail.com

Executive director/secretary: Lauren Johnson

Executive director/secretary email: ljohnson@tx.cpa

Please fill in the following:

Number of members June 2024:	<u>2420</u>
Number of members April 2025:	<u>2353</u>
Number of new members:	<u>389</u>
Number of member reinstates:	<u>51</u>
Number of hours of CPE programming provided by chapter:	<u>49</u>

List your chapter goals for each area listed below and provide details on the outcomes, any available metrics, and information about the work done towards these goals.

Community and Membership

1. Achieve the milestone of 2,500 chapter members, with 1,900 being CPA members- This year, the chapter prioritized targeted outreach through strategic email campaigns, direct board member engagement, and increased visibility at local professional events.

To help retain members, a list of potential drops was divided among the board, who personally reached out to share the value of TXCPA membership and encourage continued involvement. As a result, the chapter reached 2,353 members and welcomed 130 new CPA members, ending the chapter year with 1,743 CPA members.

2. Achieve 85% overall retention of chapter members- The Austin Chapter's member retention efforts over the past year were intentional, data-driven, and centered on creating meaningful connections with our members. Through a combination of strategic initiatives and personalized outreach, the chapter achieved an 81% retention rate — a strong reflection of our commitment to member engagement and value. This was still a victory for the chapter, as the retention rate increased from 79% to 81% this chapter year.

Each month, welcome emails were sent to new members, who were also recognized in our monthly newsletter alongside member anniversaries — simple but meaningful ways to help members feel seen and appreciated.

In addition, the chapter explored new touchpoints to build community and connection, helping reinforce the value of membership at every stage of a CPA's career. This year, the chapter launched a new initiative called "Community Connections" — a series of events designed to reach members living outside the immediate Austin area who may not be able to attend our regular networking and CPE events in the city. Using member data, the committee identified key regions with high concentrations of CPA members and non-members and prioritized those areas for outreach. The first event was held in Marble Falls and saw an excellent turnout, including several non-member CPAs from the area. Chapter board members were on hand to connect with attendees and share the value of TXCPA membership, helping to strengthen relationships and raise awareness beyond Austin. Given the success of this initial effort, the chapter looks forward to expanding the Community Connections program in the coming year to reach even more members across the chapter area.

3. Reach 25% unique members with local engagement- This year, the Austin Chapter set an ambitious goal of achieving 25% unique member engagement in chapter events, aiming to increase participation across our diverse membership. Through a variety of offerings — including CPE programs, networking events, community service opportunities, and student outreach — the chapter worked strategically to create meaningful and accessible experiences for members at all career stages. While we ultimately reached 21% unique engagement, just shy of our target, this reflects strong participation and steady progress. The insights gained this year will guide future efforts as we continue to build inclusive, high-value programming that resonates with more members across the chapter.

Pipeline

1. Reach 600 students at local universities, elementary, middle and high schools- This year, the Austin Chapter made it a priority to connect with the next generation of CPAs by setting a goal to engage 600 local accounting students. Thanks to the dedicated efforts of our chapter board

and volunteer members, we were able to reach nearly 500 students through classroom presentations, career panels, campus events, and mentorship opportunities. While we fell just short of our target, the impact was significant — fostering early connections to the profession and building awareness of the CPA pathway among future leaders.

In addition to participating in the Austin Community College Accounting Career Fair — where we connected with students and shared resources to support their CPA journey — the chapter significantly expanded its student outreach efforts this year. Board members attended virtual ACC accounting classes to emphasize the value of the CPA license, and we launched our Spring Mentor Program, pairing students with experienced CPAs for real-world guidance.

The chapter also engaged students through participation in various events including the UT Austin High School Program put on by the UT Austin McCombs Business School, Dinner with the Dean: IDEAL Summer Academy with Huston-Tillotson University, and The Texas State Universities Fall Fest. The chapter hosted an Application of Intent Workshop & Mock CPA Exam with Austin Community College, and had a table at the Texas State University Winterfest along with about 20 local accounting firms. These initiatives collectively reflect our commitment to supporting and inspiring the next generation of accounting professionals throughout Central Texas.

2. Provide early career connections to 25 students, candidates, or early career individuals- One of the Austin Chapter's goals this year was to provide early career connections to at least 25 students, candidates, or early career professionals — and we're proud to share that we hit this goal through our Spring Mentor Program. The program welcomed 25 mentees, an increase from 20 mentees last year, each paired with one of 11 dedicated mentors, all experienced CPAs who volunteered their time to offer guidance, share insights, and help mentees navigate the early stages of their careers. This initiative not only supports the professional growth of emerging CPAs but also strengthens connections within our local accounting community. The program was revamped a bit this year, and meets twice a month, with one meeting being a panel discussion on a topic relevant to students and young CPA members, and the second meeting is an open forum with the moderator of the program bringing a topic to discuss, but also open to the mentees to bring their questions or concerns to the group as well. So far, we have received positive feedback from the group on the new format!

Advocacy

1. Achieve PAC contribution goal for 2024 fundraising year of \$12,180- This year, the TXCPA Austin chapter focused on raising awareness among our members about the critical role the TXCPA Political Action Committee (PAC) plays in advocating for the accounting profession, especially during an active legislative session. Through targeted outreach efforts—including informational emails, virtual sessions, and personal conversations—we highlighted the importance of member support to influence key legislation affecting our industry. While our goal was to raise \$12,180, we are proud to report that the chapter raised \$8,415 in contributions this year. These funds will help ensure our voices continue to be heard at the state Capitol.

2. Achieve 5% member participation in the PAC- This year, the TXCPA Austin chapter prioritized increasing both the total contributions to the TXCPA Political Action Committee (PAC) and the breadth of member participation. In addition to our fundraising target of \$12,180, the chapter set a goal of achieving at least 5% member participation in PAC contributions, striving to expand our donor base and build long-term advocacy strength. While we did not reach that benchmark, we are encouraged by the progress made—member participation increased to 2.5%, reflecting a growing awareness and willingness to invest in our profession’s future.

Learning

1. Provide 49 hours of quality CPE programming- Over the past year, TXCPA Austin has been dedicated to delivering high-quality, relevant continuing professional education (CPE) to our members. In total, the chapter offered 49 hours of CPE programming, including hallmark events such as the annual Free CPE Expo, the two-day Tax Conference in November, two full days of tax updates in January, and the Accounting & Finance Leaders Conference. To better meet the evolving needs of our members, we embraced new formats designed for greater accessibility and flexibility. The Free CPE Expo was held virtually over two days, while the Accounting & Finance Leaders Conference was presented in two 4-hour virtual sessions across separate weeks. For the first time this year, the chapter partnered with TXCPA and this event was promoted to all TXCPA members, and about 50% of the attendees were from other chapters aside from Austin.

We also expanded our reach by inviting new speakers from outside the Austin area, leveraging the virtual format to bring in diverse perspectives and expertise. The chapter secured Kimberly Ellison Taylor, Chief Executive Officer of KET Solutions and past AICPA Chair, to speak at the virtual Accounting and Finance Leaders event. Our goal throughout the year has been to keep members informed, engaged, and supported — no matter their schedule or location.

OPTIONAL: List any other activities, programs and services not mentioned above in your goals that were offered by the chapter (or new to the chapter).

1. As part of our ongoing pipeline initiative, the chapter hosted a series of dynamic networking events designed to engage and connect with young CPA professionals. These events were held at fresh, exciting venues that attract a younger audience, including a gathering at the Museum of Ice Cream — a vibrant, interactive space known for its whimsical atmosphere, sweet treats, and selfie-worthy moments. To further support engagement, the chapter extended complimentary invitations to all newly licensed CPAs in the Austin area, encouraging them to get involved and experience the value of chapter membership firsthand. The event drew a fantastic turnout, including many new faces, and we were thrilled to see several attendees take the next step by joining chapter committees afterward.

We also hosted the annual Holiday Event at Kung Fu Saloon, an arcade event space in the Austin area. This was another effort to reach our younger CPA members. We had a record turnout of members, and also new attendees who hadn't attended a chapter event year. It was a strong example of how intentional, inclusive outreach can energize the next generation of CPA leaders.

2. We continued to prioritize community engagement by offering a full calendar of volunteer opportunities for members throughout the year, with service events scheduled on a bi-monthly basis. In an effort to broaden our impact and make volunteering more accessible, we expanded our list of partner organizations to include nonprofits located outside of central Austin. This strategic outreach not only supported a wider range of community needs but also helped us engage members who may not have previously participated due to location constraints. As a result, we were excited to see increased involvement from new volunteers and a stronger connection between our chapter and the greater Austin area. These efforts reflect our commitment to giving back while fostering camaraderie and purpose among our members.
3. We proudly embraced Business and Industry (B&I) Month by curating a series of weekly programs tailored specifically for our B&I members, offering both valuable CPE content and opportunities for meaningful connection. In April, we hosted the annual Accounting & Finance Leaders Conference in two 4-hour virtual sessions held on separate weeks, designed for flexibility and focused learning. Between those sessions, we organized our signature B&I Behind the Scenes event, treating members to a unique private chocolate and cheese tasting experience with Antonelli's Cheese Shop — an iconic local institution. We did have to move this event to a later date, but are still providing the opportunity to our B&I members. We closed out the month with an End of Tax Season Happy Hour at an exciting new venue, offering members a fresh location to relax, network, and celebrate the end of a busy season.