



TXCPA

2020-2024 STRATEGIC PLAN OVERVIEW REPORT

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DEAR TXCPA MEMBERS,

You are a vital part of the CPA profession and of the Texas Society of CPAs, both dedicated to service and both required to be nimble and adaptable in order to thrive in the future and serve an ever-changing landscape. Recent events have highlighted the critical part our profession plays in advocating for and serving our clients, employers and communities. We see now more than ever the need for CPAs to be able to quickly pivot to provide service in new and nontraditional ways.

TXCPA's Strategic Plan, developed through research, listening and thought-provoking conversations with members and volunteers from across the state, is a three- to four-year plan designed to help us best serve our members as they adapt to serve the changing needs of individuals and organizations around the world. We are mapping our way to the strategic destination of becoming a unified, influential and adaptive association driven by technology to deliver customized value and service to the evolving accounting profession.

Our vision, mission, guiding principles, strategic pillars and measures of success remain the same as in the previous plan. New this year are three high-level goals designed to strengthen and grow our profession and association. Through the work done under this plan, we are even more dedicated to building a stronger and more future-ready organization than ever before.

Sincerely,

Jerry Spence, CPA
2020-2021 Chairman



Ben Simiskey, CPA, CFP®
Strategic Planning Committee Chairman



OUR VISION

Empower members to lead and succeed.

OUR MISSION

The Texas Society of CPAs exists to support its members in their professional endeavors and to promote the value and high standards of Texas CPAs.

OUR COMMITMENT TO DIVERSITY, EQUITY, INCLUSION AND BELONGING

TXCPA values the diverse contributions and talents of all its members. We are committed to promoting diversity, equity, inclusion and a sense of belonging in the workplace, in membership and in the accounting profession. Diversity includes, but is not limited to, race, gender, generations, abilities, orientation, and religious beliefs.

GUIDING PRINCIPLES



LEVERAGE & LEAD TECHNOLOGY

TXCPA strives to be a leader in technology, helping support and guide members as technology changes their daily work and providing members with personalized, high-quality service for stronger connections and engagement.



FOSTER INCLUSIVE LEADERS

TXCPA's future depends on having leaders at the helm of the Society, the chapters, our communities and the profession. We are in a unique position to identify, engage, support and groom future CPA leaders.



ORGANIZATIONAL FLEXIBILITY

It is vital that TXCPA respond to and prepare for changes in the profession, our association and the needs of Texas CPAs.



CONNECTING MEMBERS & RESOURCES

By leveraging the professional power and knowledge of 28,000 members across Texas, TXCPA will help members connect with each other, grow their networks and draw upon the expertise of others to improve their services to clients and their employers.



OUR STRATEGIC PILLARS



COMMUNITY & CONNECTION

Provide members with opportunities and resources to connect, serve and lead.



PROFESSIONAL EXCELLENCE

Provide resources to assist members in the achievement of professional and personal success.



ADVOCACY

Be the voice of our members before public policy makers and the public.

MEASURES OF SUCCESS

Increased member satisfaction and member engagement are key outcomes of successful implementation of our strategic plan. We will track our efforts and hold ourselves accountable for the delivery of value and services that drive your unique membership experience and increase the return on your membership investment

GOALS FOR 2020-2024

GOVERNANCE

Organize the Society's governance and chapter affiliations to design an adaptable and unified structure that will act as a catalyst for growth and strengthening operations.

- Clarify the roles and responsibilities of TXCPA and our 20 local chapters to ensure we are a unified team effectively addressing the evolving environment and member needs.
- Seek opportunities to improve TXCPA's strategic capabilities and efficiency of operations.
- Identify ways to best enable our governance structure to be adaptive and proactive.

TECHNOLOGY

Acquire or leverage technology platforms to customize and expand delivery of education and member value.

- Provide deeper technology support and customized value for members and their firms and companies.
- Assess TXCPA's technology platforms to ensure we are leveraging the most strategic solutions and competing effectively in the marketplace.
- Customize our member services based on individual preferences and choice.

GROWTH

Broaden member categories to reflect an evolving profession and identify complementary organizations to partner or affiliate with for expanded service capabilities.

- Evaluate TXCPA membership categories to recognize the changing dynamics that are now part of the accounting profession.
- Assess the market to determine the potential synergistic organizations that align to strategic needs of members and the profession.
- Expand TXCPA's influence and integration with other associations and stakeholders through strategic partnerships that enhance or expand our capabilities to serve the profession in Texas.

MEMBER-FOCUSED, MEMBER-DRIVEN

You've seen the goals outlined for our future and developed in response to the changing needs of your profession. Working together, we can evolve TXCPA and the accounting and finance profession in Texas to be nimbler and more responsive. Members are at the center of all we do – with your success, engagement and satisfaction as our ultimate measures of success.

Your involvement and support of TXCPA's initiatives will enhance the value of your membership. TXCPA and our chapters offer a variety of opportunities for members to maximize their memberships, enhance their careers and give back to the profession and communities across the state. We invite and encourage you to get involved and engaged in TXCPA!

2020-2021 TXCPA Executive Board Members

Jerry Spence, CPA, Chairman
 Jason Freeman, CPA, JD, Chairman-elect
 Lei Testa, CPA, CGMA, Immediate Past Chairman
 Susan Roberts, CPA, CGMA, Treasurer-elect
 Priscilla Ann Soto, CPA, Secretary
 Sheila Enriquez, CPA, CFF, JD
 Julia Hayes, CPA
 Jimmy Hudson, CPA, CGMA
 Mohan Kuruvilla, CPA, Ph.D.
 Brandon Mays, CPA
 Jay Neukomm, CPA
 Tim Pike, CPA, CGMA
 Angela Ragan, CPA
 Kate Rhoden, CPA
 Jodi Ann Ray, CAE, President and CEO

2020-2021 TXCPA Strategic Planning Committee Members

Ben Simiskey, CPA, CFP®, Chairman
 Allyson Baumeister, CPA, CGMA
 Edie Cogdell, CPA, CGMA
 Jason Freeman, CPA, JD
 Kathryn Hesskew, CPA, ABV, CFF
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 Billy Kelley, CPA, CGMA
 Elena Levario, CPA
 Jim Oliver, CPA, CGMA, CFP®, PFS
 Stephen Parker, CPA
 Angela Ragan, CPA
 Susan Roberts, CPA, CGMA
 Jerry Spence, CPA