

TXCPA'S 2018-2019 YEAR IN REVIEW

FOCUSING ON THE FUTURE

By DeLynn Deakins, *Today's CPA* Managing Editor

What an exciting year it has been for TXCPA, your professional home! TXCPA remained highly successful as the largest, most influential association of accounting and finance professionals in Texas.



Under the direction of our 2018-2019 Chairman Stephen Parker, CPA-Houston, we continued our work supporting the dynamic three-year strategic plan TXCPA 2020. There are three pillars of success that form the foundation of TXCPA 2020: Community and Connection, Professional Excellence and Advocacy.

At the Annual Meeting of Members in San Antonio last June, we outlined five areas of focus: Engage and Grow Our Community, Fuel Our Chapters, Reenergize Our Brand, Advance the Future of Learning, and Successfully Navigate Sunset Review. Closing out the year, here are some highlights of our key successes in those areas.

COMMUNITY AND CONNECTION

Engage and Grow our Community

TXCPA's overall membership is holding steady, while our student membership grew 50% in 2018-2019! One of our top priorities remains growing our community and engaging young people who are considering a career in accounting and becoming a CPA.

Tracking and measuring member data is an essential part of engaging and growing our community. We completed a membership value study in early 2019, which provided important insights on what our members value most, how they perceive the value of TXCPA membership, and how they would like to consume products and services from our association. Based on the

We relaunched our career center! The career center is the ideal place for members to search for a new job or post an opening and hire just the right candidate. Go to <https://careers.tscpa.org/> to learn more and get started.

feedback, our leadership recommended holding CPA dues at the same rate. The chapters agreed, so there will be no dues increase for CPA members in the 2019-2020 year as we continue to remain focused on adding value for our members.

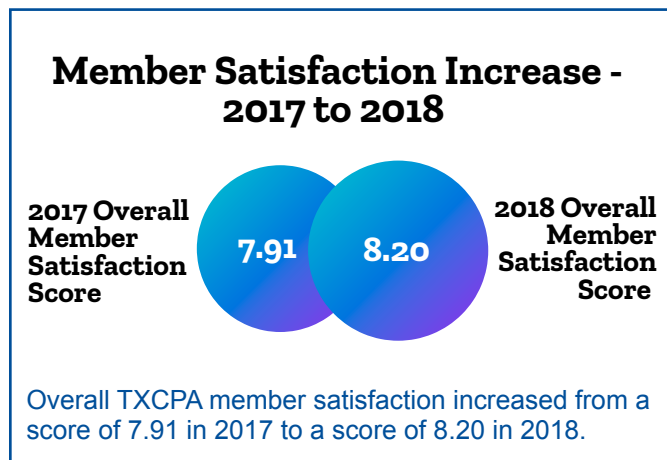
We also completed a member satisfaction survey in November of 2018. This survey followed up on the satisfaction survey done in 2017. In the latest survey, members expressed that they look to TXCPA to provide:

- Accessible, relevant and affordable CPE content;
- Timely and up-to-date professional information;
- Networking opportunities; and
- Advocacy for the CPA license.

The challenges they cited encountering are:

- Keeping up with change; and
- Finding qualified new staff/talent.

The survey revealed a statistically significant increase in the overall member satisfaction score for the Society from the previous survey. We would like to thank all the members who took the time to provide their input. TXCPA is using the actionable data received as we develop programs and initiatives to best meet the needs of members.



We launched three NEW communities on TXCPA Exchange: Practice Management, Tax Issues and

Nonprofit Accounting. These new communities offer opportunities for members to discuss specific topics with their peers.

REENERGIZE OUR BRAND

At Advocacy Day and the Midyear Board of Directors and Members Meeting in January, we unveiled our new visual identity and refreshed brand. The most noticeable change was a shift from TSCPA to TXCPA, which gives us the opportunity to distinctly show who we connect, protect and advance – Texas CPAs. Now, we can more clearly distinguish our Texas pride and identify ourselves as separate from the Texas State Board of Public Accountancy (TSBPA) and other state CPA societies.

Our new visual identity lays a foundation on which we can focus our messaging and resources to be aligned with our brand promise to promote and protect the profession, and connect and promote members. As a relevant and magnetic organization for future generations of Texas CPAs, TXCPA can continue to grow and stay strong.



Go to tscpa.org to see the look and feel of the newly redesigned TXCPA website.

FUEL OUR CHAPTERS

The TXCPA chapters are where members have an opportunity to connect and serve on a regular basis. To that end, a new task force was formed in June to collaborate and recommend ways TXCPA and our chapter network can work together to best serve the needs of current and future members. As a result of the task force recommendations, we're increasing the visibility of shared resources that are available to the chapters,

BRAND IMPLEMENTATION TASK FORCE

TXCPA thanks the members of the Brand Implementation Task Force, which includes:

Brandon Booker, Fort Worth

Sheila Enriquez, Houston

Kate Rhoden, Austin

Bill Schneider, Dallas

Jeannette Smith, Rio Grande Valley

Priscilla Soto, San Antonio

AJ Taylor, Brazos Valley

Stephen Parker, TXCPA Chairman

Jodi Ann Ray, TXCPA President and CEO

Staff Liaison: **Melinda Bentley**, Director,
Marketing and Communications

BRAND PLATFORM

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.

Vision: Empower members to lead and succeed.

Our purpose: To connect, protect and advance CPAs in Texas.

Brand promise: We promote and protect the profession, and connect and promote individual members.

Positioning: The largest, most influential association of accounting and finance professionals in Texas, dedicated to supporting one another, and promoting and protecting the value of the CPA designation.

Tagline: Connecting. Protecting. Advancing.

Brand personality: Trustworthy, Leader, Knowledgeable, Collaborative, Friendly

expanding and enhancing chapter leader training, and making reports, chapter metrics and other resources more readily available.

To be as efficient with our resources as possible, we're investing in strong technology that can be used across the chapter network to save resources and provide members with a consistent member experience.

PROFESSIONAL EXCELLENCE

Advance the Future of Learning

Delivering superior CPE is a top priority for the Society. With TXCPA's extensive lineup of high-quality live and web-based courses, you can choose when, where and how to take your CPE as you need it.

TXCPA past chairman Kathy Kapka, CPA-East Texas, created a brand new FREE on-demand ethics course for CPA members who renew their membership for 2019-2020. The program can be accessed between the time your membership is renewed and May 31, 2020. For those members who prefer to take a live ethics course, some of our chapters offer opportunities to take it in person.

We've invested in a new learning management platform to ensure quick and nimble delivery of programs to

CHAPTER TASK FORCE

TXCPA thanks the members of the Chapter Task Force, which includes:

Jesse Dominguez, Austin

Travis Garmon, San Angelo

Arturo Machado, San Antonio

Jennifer Perales, Corpus Christi

Tim Pike, Dallas

Jennifer Poff, TXCPA Houston Executive Director

Susan Roberts, Fort Worth

Ben Simiskey, Houston

Stephen Parker, TXCPA Chairman

Jodi Ann Ray, TXCPA President and CEO

Staff Liaison: **Bryan Garza**, Director, Membership and Community

GROW YOUR BUSINESS AS A PEER REVIEWER

Are you looking to help grow your business and build your reputation as a firm that's committed to providing high-quality services? Become a peer reviewer! As a peer reviewer, you can leverage your accounting and auditing practice expertise. It also creates additional opportunities to network with your peers.

To learn more about the requirements, visit AICPA.org/beareviewer. Call TXCPA at 800-428-0272 to find out how you can become a peer reviewer in Texas.

members. New content has been developed for our TXCPA Passport package that is now available for members on demand.

You also receive a minimum of six hours of free CPE on professional issues each year. These updates are available in convenient two-hour broadcasts three times per year.

Administering the Peer Review Program

Peer Review continues to go through a tremendous amount of change. As we administer the program, our focus is to use resources as effectively as possible and make the program both educational and supportive. Our thanks goes to the TXCPA Peer Review Committee and staff members who are navigating the changes to make this possible.

In January, we began conducting technical peer reviews for our colleagues at the Louisiana Society of CPAs.

ADVOCACY

TXCPA Advocacy Day and Sunset Legislation

In late January, TXCPA hosted its Advocacy Day for the CPA profession. Hundreds of TXCPA members from around the state convened in Austin to learn how to be effective advocates for the profession and meet with their legislators to discuss issues of concern. It takes a number of members who commit their time during tax season to ensure we are protecting our members and the accounting profession and we are grateful for your commitment.

At press time, the Texas legislative session was in its final weeks. The number one priority for TXCPA and the profession in the session was to assure passage of the Sunset legislation that will continue the Texas State Board of Public Accountancy (TSBPA) and the Texas Public Accountancy Act (TPAA).

The Sunset legislation (HB 1520 and SB 613) was introduced in the later part of February. The bill sponsors were Rep. Senfronia Thompson (D-Houston) and Senator Kirk Watson (D-Austin). In addition to pushing for its passage, TXCPA worked to have the bill amended to include provisions related to CPA firm mobility.

TXCPA reviews all draft legislation to determine its potential impact on the profession and our members. During the current session, over 9,500 bills and resolutions have been introduced and we are actively monitoring 145 proposed bills.

Professional Standards and Federal Tax Policy Committees

An important piece of our advocacy platform is the work of the Professional Standards Committee and Federal Tax Policy Committee. These committees issue responses to exposure drafts from standards-setting bodies that have an impact on the practice of accountancy. Their important work ensures that TXCPA has a consistent presence before regulators each year. You can view all of

TXCPA'S CPA-POLITICAL ACTION COMMITTEE

TXCPA
PAC

Your contribution to the CPA-Political Action Committee (CPA-PAC) is the fastest, simplest and most efficient

way to get involved in the political process and its positive effects on our profession. Of all the funds contributed to the CPA-PAC, 75% is used to provide bipartisan support to state lawmakers in your community through your local chapter, while the remaining 25% is used to provide bipartisan support to candidates in campaigns for statewide office. Members of the TXCPA PAC Committee work closely with local chapters and their public affairs committees to determine the policymakers who should receive contributions.

To learn more about the CPA-PAC and make a contribution, please visit the Advocacy section of TXCPA's website at tscpa.org.



TXCPA's responses on our website at tscpa.org.

TXCPA is All About You

We would like to thank you for your TXCPA membership and support! TXCPA's success in 2018-2019 is the direct result of the guidance from our outstanding leadership and countless volunteer hours from our members. If you have not served in a volunteer role and are interested in participating, please contact your chapter or visit the "Get Involved" section under the Mem-

bership tab of our website at tscpa.org.

Be sure to read your upcoming July/August issue of *Today's CPA* magazine. We'll be introducing TXCPA's incoming chairman Lei D. Testa, CPA-Fort Worth.

We hope to see you at the 2019 Annual Meeting of Members and Board of Directors Meeting on June 21-22 in New Orleans. We have a full agenda of dynamic speakers and leaders who'll be discussing professional and business issues, and TXCPA's plans to connect, protect and advance CPAs in Texas. ■







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Selling your accounting firm is complex.
Let us make it simple.