



Looking Back and **Charting the Path Ahead**

TXCPA members and their guests headed to the Omni Frisco Hotel at The Star on June 28-29, 2024, for an unforgettable Annual Meeting of Members and Leadership Council Meeting. The event offered a dynamic blend of networking, insightful knowledge exchange and a dash of fun-filled activities.

TXCPA Chair Mohan Kuruvilla, Ph.D., CPA, Immediate Past Chair Tim Pike, CPA, CFE, and TXCPA President and CEO Jodi Ann Ray, CAE, kicked off the meeting with a review of the work completed in 2023-2024 and a look at what's ahead in 2024-2025.

Despite the challenges facing the profession, TXCPA maintained a strong membership base, surpassing 28,000 members. Efforts to connect with potential members have remained a priority and student membership has increased. Efforts to build a strong CPA pipeline have been a major focus, with extensive student outreach programs reaching over 11,500 students with messages about accounting careers and membership.

Advocacy is one of the most important reasons members join TXCPA. We are actively representing CPAs at the state and national levels, particularly in professional standards and tax policy. With the upcoming legislative session in 2025, advocacy efforts will be as crucial as ever.

Community building is another area of focus. TXCPA's chapters are essential in creating a sense of belonging among members. Initiatives like the Month of Service and Accounting Opportunities Month have highlighted the commitment of CPAs to their local communities, and diversity and inclusion efforts are ongoing to strengthen the community further.

TXCPA is an organization that is dynamic, forward-thinking, and deeply committed to

both its members and the CPA profession. Looking ahead, TXCPA is focused on continuing to grow the membership, improving member satisfaction, streamlining the delivery of benefits, and increasing support for our advocacy initiatives.

2023-2024 Scholarships

224 applicants
\$137,000 awarded
56 recipients

LEADING THROUGH UNCERTAINTY

AICPA's Immediate Past Chair Okorie Ramsey, CPA, CGMA, PMP, gave the keynote presentation on "Accelerate and Lead Through Uncertainty." He said the top concerns for finance and accounting teams are:

- Accelerated digital transformation;
- GenAI and AI;
- The need for new competencies and skills;
- Finding and retaining talent; and
- Maintaining culture in a hybrid environment.

He also discussed the future of finance, transformation in public accounting, the changing workforce, AI-driven solutions, the path to success for diversity, equity and inclusion initiative, and more. Go to the TXCPA website to see his presentation.

Okorie also joined TXCPA's [Destination CPA podcast](#) as our June guest! Tune in to learn more about his path to the CPA license, his advice for students, the importance of representation, and his reflections on his time as AICPA Chair.

THE CPA PIPELINE

In 2022, TXCPA launched our CPA Pipeline Strategy. By 2023, TXCPA had successfully influenced a legislative change to the Texas Public Accountancy Act, reducing the required hours to sit for the CPA

TXCPA's 2024-2025 GOALS

MEMBERSHIP

Stabilize and grow

Leverage member research to improve the experience

Identify nonmembers' needs and perspectives

COMMUNITY

Resources to empower chapter leaders

Streamline for efficiencies

ADVOCACY

Bolster the TXCPA PAC to support advocacy

Engagement in the 2025 legislative session



Exam from 150 to 120. New initiatives are opening new doors, while partnerships with influential groups such as the Center for Audit Quality are amplifying TXCPA's presence in Texas high schools.

We've shared career insights with nearly 24,000 students, hosted two CPA Weeks, organized two Accounting Opportunities Months, and expanded our network of Faculty and Student Ambassadors across Texas campuses. Additionally, we've introduced new branded materials with Spanish translations. To read the CPA Pipeline Strategy, visit <https://bit.ly/FutureTXCPAs>.

TXCPA STRATEGIC PLAN

TXCPA Chair-elect Billy Kelley, CPA; Immediate Past Chair Tim Pike, CPA; Past Chair Sheila Enriquez, J.D., CPA; and Past Chair Stephen Parker, CPA, shared the goals and objectives of TXCPA's new Strategic Plan. The goals include:

- #1: Secure the future of the accounting profession by attracting and retaining talent.
- #2: Ensure the continued influence, impact and viability of the organization by expanding resources to grow and serve our market and responding to its evolving needs.
- #3: Improve the quality and efficiency of the delivery of services and expand opportunities through a streamlined organization structure.
- #4: Enhance TXCPA's position in the marketplace with a robust, multichannel marketing strategy to increase visibility, engagement and growth.

Attendees were then invited to break into small groups at their tables to discuss

the Strategic Plan goals and share their insights. TXCPA will leverage this valuable feedback to finalize our tactics and drive the implementation of the Strategic Plan.

BUSINESS MATTERS

In other key updates and reports:

- TXCPA Treasurer Christi Mondrik, CPA; Past Treasurer Angela Ragan, CPA; Investments Committee Chair Chris Lucas, CFA, CPA/ABV; and TXCPA's former CFO Edie Cogdell, CPA, CGMA, gave the annual financial report;
- Joe Barnard, CPA, shared information on the TXCPA Insurance Trust;
- Accounting Education Foundation Chair Gary McIntosh, CPA, provided an AEF update and special awards;
- Ed Kless from Tipping Point Advisors/VeraSage Institute presented information on business model transformation; and
- TXCPA PAC Chair Terri Hornberger, CPA, shared important PAC updates.

COMING UP: DON'T MISS ADVOCACY DAY AND THE NEXT ANNUAL MEETING

Join us for TXCPA's Advocacy Day and Midyear Leadership Council Meeting on January 28-29, 2025, at the Sheraton Austin Hotel at the Capitol. Keep an eye on the weekly

Viewpoint e-newsletter for registration details.

Mark your calendars now for our next Annual Meeting of Members and Leadership Council Meeting, set for June 26-27, 2025, at the beautiful Tremont House and Grand Galvez in Galveston. Save the date and get ready to kick off another fantastic year with TXCPA!

Membership and Student Reach

28,085 Members
75% CPAs
1,426 New Licensees
5,453 Students

11,674 Students Reached
300 EVERFI Reach
802 Destination CPA Podcast Downloads
5,022 Reached During Accounting Opportunities Month

KENNETH W. HURST FELLOW AWARD

Larry Edgerton, CPA
TXCPA Permian Basin

2023-24 TXCPA PAC CHAPTER AWARDS

Large Chapter Award
Closest to 2023-24 Fundraising Goal
TXCPA Dallas
President: Max Duplant
PAC Chair: Terri Hornberger

Highest Percentage of Members Contributing
TXCPA South Plains: 9.2%
President: William Sanders
PAC Chair: Mark Dickson

Special Recognition Award
Chapter with the largest year over year fundraising increase: TXCPA Fort Worth
President: Stephanie Shaner
PAC Chair: Renee Prince

Highest Percentage of Fundraising Goal
TXCPA Southeast Texas: 181.5%
President: Ricardo Colon
PAC Chair: Josh LeBlanc

OUTSTANDING CHAPTER AWARDS

Please see the Chapters Column in this issue of *Today's CPA* to read about the 2023-2024 Outstanding Chapter Awards.

2024-2025 TXCPA LEADERSHIP

Board of Directors and Leadership Council
[Go to the TXCPA website](#)