

**TXCPA (Your Chapter) ANNUAL ACTION PLAN**

**Vision**: Empower our members to lead and succeed

**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.

**Strategic Plan Destination**: We are a unified, influential, and adaptive association driven by technology to deliver customized value and service to the evolving accounting profession.

**Chapter Description:** Add a description of your chapter here. The description should include number of members, geographic location and details about the local economy. Please include details about the chapter board of directors and chapter volunteers.

# CHAPTER PLANNING TIMELINE

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| --- | --- |
| **Month** | **Chapter Planning Activity** |
| June/July | Board meets to select chapter leaders for TXCPA nominations |
| October/November | Chapter nominating committee meets to produce a slate of candidates for chapter leadership in the following year |
| January | Chapter annual meeting and elections |
| February | Chapter leaders planning meeting for the upcoming year |
| March/April | Recruit committee leaders and volunteers |
| May | Board of directors and volunteer orientation for the upcoming year |
| May | Year-end report due on May 21 |
| Ongoing | Board to discuss chapter goals and update status of each throughout the year |

# CHAPTER PLANNING MATRIX

**TXCPA Pillar of Success – Community & Connection**

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| --- | --- | --- | --- | --- |
| **Chapter Activity, Program or Service** | **Goal(s)** | **Volunteer Leader(s) or Committee Responsibility** | **Budget Impact** | **Status** |
|  |  |  |  |  |
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**TXCPA Pillar of Success – Professional Excellence**

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| --- | --- | --- | --- | --- |
| **Chapter Activity, Program or Service** | **Goal(s)** | **Volunteer Leader(s) or Committee Responsibility** | **Budget Impact** | **Status** |
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**TXCPA Pillar of Success – Advocacy**

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| --- | --- | --- | --- | --- |
| **Chapter Activity, Program or Service** | **Goal(s)** | **Volunteer Leader(s) or Committee Responsibility** | **Budget Impact** | **Status** |
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# CHAPTER PLANNING OVERVIEW

This section includes a summary of key findings from chapter planning exercises and discussion with volunteer leaders. As part of the annual planning process [insert details about the analysis completed by your leaders here.]

**KEY FINDINGS (SWOT or SOAR)**

# CHAPTER GOALS

**Community and Membership**

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| --- | --- |
| Recruitment | Achieve the milestone of XXX chapter members. |
| Retention | Achieve XX% overall retention of chapter members. |
| Engagement | Reach XX% of members with local engagement. |

**Pipeline**

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| --- | --- |
| Outreach & Awareness | Reach XX students at local university. |
| Scholarships | Provide local scholarship funding by raising $X,XXX. |

**Advocacy**

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| --- | --- |
| PAC | Achieve PAC contribution goal for 2021 of $X,XXX. |

**Learning**

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| --- | --- |
| CPE | Provide XX hours of programming. |

# CHAPTER ACTION PLAN

**Goal One: Expand our reach and grow the membership. Achieve the milestone of XXX chapter members.**

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| --- | --- | --- |
| **Action Item:** | **Assigned to:** | **Due Date:** |
| Outreach to non-members from prospect list to invite them to membership and participate in chapter events. Board members connect with personal invitation to CPAs they know.  | Chapter President, Board of Directors | November 2020 |

**Goal Two: Achieve XX% overall retention of chapter members**

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| --- | --- | --- |
| **Action Item:** | **Assigned to:** | **Due Date:** |
| Review potential drops list monthly and reach out to members not renewed by email or phone call.  | Board of Directors, Executive Director | September 2020 |

**Goal Three: Reach XX% of members with local engagement.**

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| **Action Item:** | **Assigned to:** | **Due Date:** |
| Provide two community service projects for chapter participation during the year.  | Outreach Committee | May 2021 |

**Goal Four: Reach XX students at local university.**

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| --- | --- | --- |
| **Action Item:** | **Assigned to:** | **Due Date:** |
| Host a Meet the Firms event for local university students.  | Board of Directors | November 2020 |

**Goal Five: Achieve PAC contribution goal for 2021 of $X,XXX.**

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| **Action Item:** | **Assigned to:** | **Due Date:** |
| Send four eblasts during the year encouraging PAC donations. | Chapter President, Executive Director | May 2021 |

**Goal Six: Provide XX hours of programming.**

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| **Action Item:** | **Assigned to:** | **Due Date:** |
| Offer two one-day courses and one two-day course. | CPE Committee | May 2021 |