



SOCIETY UPDATES

YEAR IN REVIEW AND OUTLOOK FOR 2022-23

Sheila A. Enriquez, CPA, JD, CFF, CVA - Chairman of the Board

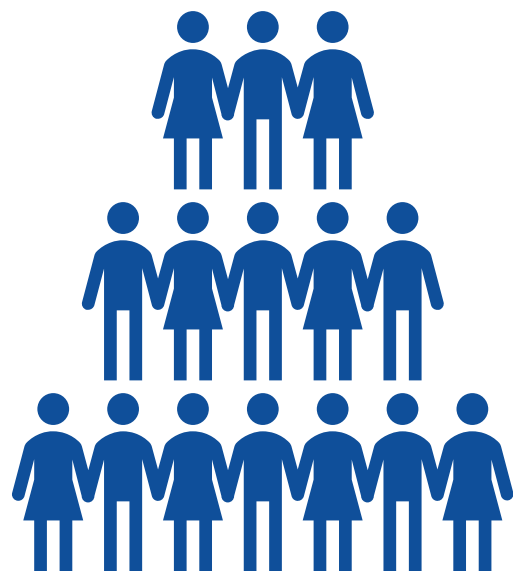
Jason Freeman, CPA, JD – Immediate Past Chairman

GROWTH AND PROGRESS

COMPLETED STRATEGIC PLAN OBJECTIVES

3.3%

GROWTH



REVERSING THE
MEMBERSHIP TRENDS

501(c)3 CONSOLIDATION FOR A
UNIFIED FOCUS ON EDUCATION



REFINED AND LAUNCHED EXPANDED
MEMBERSHIP CATEGORIES

501(c)3 TASK FORCE

Gary McIntosh, Chairman

Jerry Spence, TXCPA Past Chair

Charlotte Jungen, AEF

Kathy Kapka, AEF

Marshall Pitman, AEF

Phillip Johnson, ACAN

Kathryn Sharp, ACAN

Walter Stock, ACAN

Kelly Hunter CPE

Lara Akinboye, CPE

Lucas LaChance, CPE

Stephen Parker, Governance

Ben Simiskey, Strategic Planning

Jodi Ann Ray, President & CEO

Eric Curtis, Curtis Strategy

Willie Hornberger, Legal Counsel

Craig Nauta, Staff

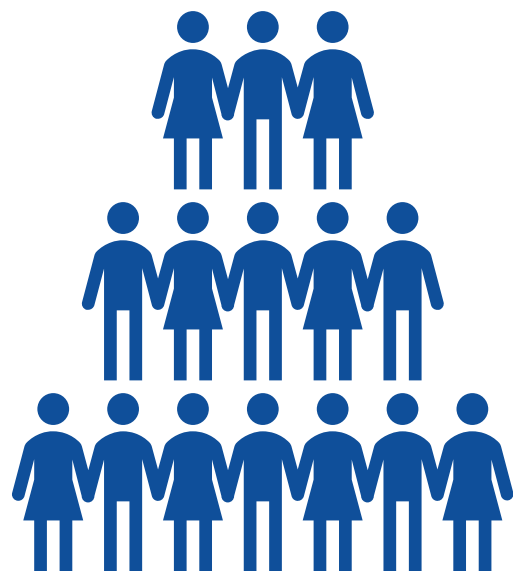
Edie Cogdell, Staff

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MEMBERSHIP TASK FORCE

Tim Pike, Dallas, Chairman

Ryan Bartholomee, Permian Basin

Caitlin Chupe, Corpus Christi

Melanie Geist, San Antonio

Allen Heckaman, San Angelo

Kelly Higginbotham, Houston

Sheryl Jimerson, Houston

Shawnee Miller, Central Texas

Kate Rhoden, Austin

Stephanie Shaner, Fort Worth

Kyle Wakeland, Dallas

PIPELINE TASK FORCE

Mohan Kuruvilla, Houston, Chairman

Tracie Miller-Nobles, Austin

Shelly Spinks, Central Texas

Ginger DeLatte, Corpus Christi

Taylor Franta, Dallas

Chris Hes, Dallas

Jennifer Johnson, Dallas

Kelly Noe, East Texas

Sarah Robertson, El Paso

Sandra Bembenek, Fort Worth

Kimberly Knox Lewis, Fort Worth

Brad Elgin, Houston

Rubik Yeriazarian, Houston

Derby Gallo, Permian Basin

Adam Hallmark, San Angelo

Bryan Morgan, San Antonio

Patty Wetz, San Antonio

Susan Anders, Wichita Falls

GOALS FOR 2021-2022



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.

COMMUNITY AND CONNECTION

Grow our Community

- Add **1,000 new members**, with one third being new CPA members
- Added **2,715 new members**, excluding new CPA licensees and rejoining 2021 drops, including **450 new CPA members**

Engage next generation CPAs

- Reach at least **6,000 high school and college students** with accounting career and TXCPA membership information
- Tracked state and chapter outreach with **6,321 reported** interactions

PROFESSIONAL EXCELLENCE

Expand digital learning opportunities

- Expand digital learning courses by **20% (620 courses)**
- Offered **696 digital learning courses** in 2021-2022

Enhance state and chapter collaboration

- Begin a CPE pilot project **with at least one chapter** and continue dialogue regarding business model of CPE
- Working with the **Fort Worth Chapter** on a CPE pilot project.

ADVOCACY

Extend the brand to promote the profession

- Continue the CPA Advantage campaign and achieve **2 million digital impressions**
- Achieved **1,461,000 digital impressions**.

Expand the influence of the CPA-PAC

- Increase total CPA member participation to **5%**, board participation to **100%** and meet our fundraising goal of **\$250,000**
- Total CPA member participation is **4.77%**, board participation is **81%**, and **\$234,054** was raised.
- *Note: 2021-2022 PAC fundraising year was a 15-month fundraising year that ran from Jan. 1, 2021, to March 31, 2022*



**THANK
YOU**



CHAIRMAN OF THE BOARD

2022-2023

SHEILA A. ENRIQUEZ, CPA, JD, CFF, CVA





OUTLOOK FOR 2022-23

Sheila A. Enriquez, CPA, JD, CFF, CVA - Chairman of the Board

COMMIT TO BE BOLD

Be intentional.

Optimize and protect.

Lead by example.

Drive growth.

STRATEGIC DESTINATION

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

GOAL 1: 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

GOAL 2: TECHNOLOGY

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

GOAL 3: GROWTH

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

PRIORITIES FOR 2022-2023

Be intentional.
Drive growth.



COMMUNITY & CONNECTION

- Grow our community with the addition of 2,500 new members, with one-third being new CPA members.
- Engage next generation CPAs by reaching at least 10,000 high school and college students with accounting career and TXCPA membership information.

PRIORITIES FOR 2022-2023

Drive growth.



PROFESSIONAL EXCELLENCE

- Expand the percentage of unique participants taking TXCPA CPE courses by 20%.
- Provide resources, communications and education to peer review firms to increase awareness of new standards and enhance the quality of peer reviews.

PRIORITIES FOR 2022-2023

Lead by example.
Optimize and protect.



ADVOCACY

- Promote the CPA brand to future CPAs and the public and increase related unique web page views by 20%.
- Expand the influence of the CPA-PAC with 100% participation from the TXCPA Board of Directors and 5% participation from CPA members.

BOLD Priorities for 2022-2023



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