



TXCPA MONTH OF SERVICE – DECEMBER 2022

CHAPTER TOOLKIT

TXCPA's Branding and Community Outreach Committee invites you to participate in TXCPA Month of Service in December. The committee has identified financial literacy service and education as a focus for the 2022-2023 year, and this toolkit has been designed to help you find and implement volunteer opportunities that will help us expand our reach and impact.

The CPA profession is well positioned to provide financial education and guidance to local communities and help Texans secure better financial foundations for the future. That know-how, combined with the profession's commitment to service, will help us make a difference in communities across the state.

Additionally, we know most chapters have existing community service programs they support regularly, and we hope you'll also continue to offer opportunities that you know local members will be looking forward to participating in.

The following information is included in this toolkit. Use the links to jump to sections as needed.

WHAT, WHO, WHEN AND HOW?

TXCPA RESOURCES

ADDING FINANCIAL LITERACY TO AN EXISTING PROGRAM

CREATING A FINANCIAL LITERACY PROGRAM FROM SCRATCH

PARTNERING WITH A LOCAL ORGANIZATION

HELPFUL LINKS



WHAT, WHO, WHEN AND HOW?

What is TXCPA Month of Service?

Started in 2015 as CPA Day of Service, this effort has been expanded to a full month each year to give more flexibility to members and chapters who are interested in being involved. During this dedicated period of time, TXCPA calls on the profession to come together to make a difference through service in their communities.

In 2022-2023, the Branding and Community Outreach Committee is again asking TXCPA members and chapters to focus their outreach on financial literacy education and service, whenever possible. That can be as simple as adding a financial literacy component to an existing effort or you can partner with a community organization for an event. We also encourage everyone to consider incorporating financial literacy service throughout the year to increase our reach and expand our impact.

Who Should Participate?

TXCPA members, chapters, firms, and companies are invited to participate in TXCPA Month of Service. Consider reaching out to members from your chapter committees – especially those focused on students and young professionals.

We are grateful for anyone who is able to give their time in December to be a part of our collective efforts.

When is TXCPA Month of Service?

TXCPA Month of Service is planned for December 2022, but service is encouraged throughout the year with engagement measured both during TXCPA Month of Service and at our fiscal year end.

How do We Participate and How Will TXCPA Measure Impact?

Here's a simple timeline for participation and measurement:

November

- **Make a plan.** Individual members, chapters and organizations can look ahead to TXCPA Month of Service and plan one or more opportunities for members to be engaged in service during December. See below for ideas and recommendations on adding a financial literacy component to an existing program, creating a program from scratch, or partnering with an organization in your local community.
- **Share your plans with TXCPA for additional promotion.** TXCPA has a community service page on our website to help members learn more about ways they can connect in their communities. Adding your plans to this page will give them greater exposure as TXCPA promotes Month of Service this fall. To submit your plans for promotion, [complete this online form](#).
- **Promote your plans.** Start promoting your scheduled opportunities as soon as possible to help increase awareness and participation.



- **Participate in TXCPA's Chapter Leader Call.** You'll hear an update and reminders about TXCPA Month of Service in addition to other valuable reports from the November Executive Board meeting.
- **Continue with planning and promotion.** As December draws near, continue to solidify your plans, update TXCPA for our communications, and communicate locally via your newsletter, website, and social channels.
- **Send materials to volunteers.** If you have volunteers who will be using TXCPA resources to make presentations, send the necessary materials early enough to allow time for preparation and any questions they may have. See TXCPA Resources below to learn more about materials available for volunteers.

December

- **Host service activities for members.** Send volunteer details and reminders to help volunteers prepare for involvement.
- **Post photos and stories using the #TXCPAService hashtag.** Use of the hashtag helps us see and share your activities on social media and helps bring more awareness to TXCPA Month of Service. Encourage members who may be participating in virtual activities to take screenshots or selfies for your posts or ask them to consider posting on their own channels and tagging TXCPA and your chapter.
- **Send in volunteer metrics.** You can collect numbers throughout the month to submit at one time or send them in after each event or program. To help us show collective impact and have consistent data, [complete this simple online form to send your metrics to TXCPA.](#)

January

- **Send final metrics.** As we prepare our wrap-up report for the leadership, membership and media, please help us be sure all activities have been reported by completing the [online metrics form.](#)
- **Give us feedback.** Your feedback is very helpful as we analyze the success and impact of Month of Service each year. If you have ideas for improvement, please email Melinda Bentley at mbentley@tx.cpa.
- **Plan activities for 2023.** December is over, but there are still many opportunities throughout the year to help members connect and serve in their communities. Take time to plan out a calendar of service to keep these opportunities top-of-mind.
- **Send TXCPA updates for posting and profiling.** The community service landing page on TXCPA's website will remain live all year. We'd love to help you promote service events in your chapter area. Please keep the updates coming and [access the online form](#) to share your events with us for promotion. We'd also welcome the opportunity to profile members who are giving back in their communities. Share your photos and stories with Kari Owen at kowen@tx.cpa for promotion in TXCPA communications and on our community service web page.



TXCPA RESOURCES

TXCPA offers a variety of prepared presentation decks, talking points and collateral related to financial literacy. Below is a list of materials available for your use. All materials are posted for download on [The CPA Advantage page of our website](#). If you have a special request for additional topics, please email Kari Owen at kowen@tx.cpa.

- Money Management 101: Designed for young adults, recent grads or anyone needing a very basic guide to making smart financial choices.
- Budgeting and Managing Money: Slightly more advanced than Money Management 101, this presentation also includes details related to buying vs. leasing cars, marriage and filing taxes.
- Disaster Preparedness and Recovery: This presentation helps guide people through the process of preparing for and recovering from a natural disaster, as it relates to their valuables, financial records, and obtaining aid.
- Planning for Retirement: Created for an audience that is in a position to be strategically saving for retirement. This presentation covers the various ways to save.
- Protecting Yourself Against Identity Theft: Covers how to protect yourself from identity theft and how to report theft should it happen to you.
- Online Safety for Senior Citizens: Developed for senior audiences who have been forced to do more online due to the pandemic. Provides tips to help them prevent falling victim to scams that prey on the elderly.

ADDING FINANCIAL LITERACY TO AN EXISTING PROGRAM

If you already have a relationship with a local community organization, consider adding one (or more!) of these financial literacy components:

- Donate [money-minded holiday toys](#) to a local community organization or shelter. Here's the [Amazon wish list](#) TXCPA used for our staff toy drive in 2021.
- Offer a [financial literacy presentation](#) at a local school, nonprofit or community organization (virtual or in-person)
- Donate [money-minded books](#) to a local library or school
- Volunteer to read a [money-minded book](#) to children at a local library or school

CREATING A FINANCIAL LITERACY PROGRAM FROM SCRATCH

Want to create your own financial literacy program from scratch, but not sure where to start? Here are a few ideas:

- Take a look at our [Community Event Idea List](#) and [Community Event Checklist](#) for details on organizing financial literacy programs in your chapter
- Utilize our [financial literacy presentation](#) materials to host lunch-and-learn education opportunities
- Create an Amazon wish list of [money-minded toys](#) and host a holiday toy drive



PARTNERING WITH A LOCAL ORGANIZATION

These are just a few organizations that offer financial literacy training as a part of their services. Donating [money-minded toys](#) or hosting a [financial literacy presentation](#) on a relevant topic are just a few ways to get involved. Consider outreach to local offices near you to discuss more partnership and volunteer opportunities.

- [Texas CASA](#)
- [Feeding Texas Network](#)
- [Goodwill Industries](#)
- [Junior Achievement](#)
- [United Way](#)
- [Communities Foundation of Texas](#)
- [Boy Scouts of America](#)
- [Girl Scouts](#)
- [Boys and Girls Clubs of America](#)
- Your local Chambers of Commerce, including but not limited to:
 - Asian American Chamber of Commerce
 - Black Chamber of Commerce
 - Hispanic Chamber of Commerce
 - LGBT Chamber of Commerce
 - Women's Chamber of Commerce

HELPFUL LINKS

- TXCPA Staff Contacts: [Melinda Bentley](#) and [Kari Owen](#)
- [Online form to submit scheduled programs for promotion](#) and the [online form to submit metrics for reporting](#).
- [The CPA Advantage page](#) where presentation materials and talking points are available for download.