

# TXCPA's Annual Meeting of Members and Board of Directors Meeting

By Rhonda Ledbetter, TXCPA Volunteer and Governance Specialist



**BOLD OUTLINE  
AND VISION  
2022-2023**

Commit to be **BOLD**:  
Be intentional.  
Optimize and protect.  
Lead by example.  
Drive growth.



**M**embers and their guests gathered at family-friendly Kalahari Resorts & Conventions in Round Rock, Texas for the 2022 Annual Meeting of Members and Board of Directors Meeting, July 1-2. There was a special feeling of excitement about being together in person at the Annual Meeting for the first time in three years and members feeling connected and engaged in their professional community.

## 2021-2022 Achievements

Immediate Past Chairman Jason Freeman, JD, CPA-Dallas, outlined the work done in the 2021-2022 year and how TXCPA is making significant progress toward our [Strategic Plan](#) goals. For more details, read the [Year in Review](#) article in the May/June issue of *Today's CPA*.

## 2022-2023 Initiatives and Priorities

[Chairman Sheila Enriquez](#), JD, CPA-Houston, CFF, CVA, encouraged volunteers to move forward with even more energy and focus to best meet the needs of current and future members. She explained: "We need to be willing to make the changes necessary to be relevant leaders in the profession. We need to commit to BE BOLD."

A **BOLD** outline and vision for the coming year have been created to help better communicate what is important for future success.

The Society will be intentional about attracting and welcoming the next generation of accounting professionals. TXCPA will optimize and protect the value of the CPA license. The members lead by example. CPAs will drive growth in the professional community. TXCPA must be agile, flexible and constantly evolving to ensure we are delivering relevant offerings for current and future members.

Enriquez noted that CPAs have experienced tremendous change in their environment in the last few years and it will continue at a quicker pace in the future, so they need to be ready to quickly adapt as change increases.

## CPA Pipeline

TXCPA, its 20 chapters and member volunteers have done significant work over the years to provide student outreach and support accounting career education. As the education landscape has evolved, TXCPA has recognized the need for a more proactive, coordinated and focused statewide approach with measurable outcomes. A Pipeline Task Force was appointed in 2021-2022. An update was outlined at the Annual Meeting by its Chairman, Mohan Kuruville, Ph.D., CPA-Houston.

“Let us continue building upon the momentum that has been started by leaders before us. Together, we can achieve great things!”

*Sheila A. Enriquez, JD, CPA, CFF, CVA*  
*TXCPA's 2022-2023 Chairman*

Please see the Chairman's Message and the cover article in this issue of *Today's CPA* for more information on TXCPA's pipeline initiatives.

## Talent Acquisition and Retention

Perspectives on this topic were shared by [Omar Choucair, CPA](#), chief financial officer of Trintech, and [Mallory Herrin, SPHR, SHRM-CP, CPLC](#), CEO and principal HR consultant at HerrinHR. With TXCPA [Chairman Sheila Enriquez](#), they addressed talent acquisition, engagement and retention, as well as repositioning the accounting profession to attract future CPAs.

Herrin stated that recent research by ManpowerGroup reveals the global talent shortage has almost doubled, with businesses around the world reporting significant difficulties attracting skilled talent. She also said that a recent Lever study showed almost 45% of employers face a problem with diversity, equity and inclusion (DEI), saying it is difficult to find diverse candidates for open positions.

Choucair said almost 75% of accounting professionals identified talent acquisition and retention as the biggest risks to their business over the next 12 months. A lack of standardized data and processes is the second-biggest risk.

He went on to say that, with a finite pool of skilled finance talent, employees have options about the companies and



## 2021-2022 AWARDS

See the Take Note section of the [July/August issue of Today's CPA](#) for the names of award recipients recognized at the meeting.

In addition to the individuals listed there, Special Recognition awards were presented to: Willie Hornberger, JD, CPA-Dallas; Mohan Kuruvilla, Ph.D., CPA-Houston; Gary D. McIntosh, CPA-Austin, CFF; Christi A. Mondrik, JD, CPA-Austin; Stephen G. Parker, CPA-Houston; and Tim Pike, CPA-Dallas, CFE.

[Award descriptions and previous recipients](#)

## CPA-PAC CHAPTER AWARDS

### Large Chapter Year Over Year Fundraising Increase

TXCPA Dallas  
President: Sharon Lukich, CPA  
Committee Chair: Terri Hornberger, CPA

### Highest Percentage of Members Contributing

TXCPA South Plains  
President: Greg Mason, CPA  
Committee Chair: Mark Dickson, CPA

### Highest Percentage of Fundraising Goal

TXCPA Southeast Texas  
President: Jeremy Triska, CPA  
Committee Chair: Josh LeBlanc, CPA

## 2022-2023 TXCPA LEADERSHIP

### Executive Board

[Go to the TXCPA website](#)

### Board of Directors

[Go to the TXCPA website](#)

work they choose. They're looking to play a strategic role in an organization and grow their skillset leveraging available technology tools. To stay competitive, employers must provide a work environment that empowers their teams to succeed.

**Editor's Note:** For more insights on the current trends in DEI initiatives and issues impacting finding and retaining talent in the accounting profession, please see TXCPA's [Accounting Industry Outlook Report](#).

The discussion turned to how organizations can engage their remote workers with a feeling of community. Choucair said that, after the COVID-19 pandemic, the hybrid workplace is here to stay. Management must think about how to help employees feel part of the team. Organizations should design policies and guidelines that show they are employee centric. He pointed out that for workers, it's often about more than just money – flexibility is important for them to feel valued. It all comes back to connection. If they don't have one, they'll probably leave.

## Accounting Education Foundation

As part of the TXCPA Strategic Plan, the CPE Foundation was recently merged with the [Accounting Education Foundation](#) (AEF). After the merger, the Society now has one 501(c)3 entity, with a unified focus on education. A new AEF Board of Directors took office June 1 and will move forward with strategic planning for the consolidated entity. The Chairman of the AEF, Gary McIntosh, CPA-Austin, reported on the Foundation's work.

The Kenneth W. Hurst Fellows Awards were established in the 1970s after the former TXCPA president made a substantial gift to the AEF. The award is bestowed to members of the accounting profession who have given gifts of \$5,000 or more within the past five years or made significant contributions to the AEF. Three individuals were presented with the award at the meeting: Jason Freeman, JD, CPA-Dallas; Kathy Kapka, CPA-East Texas, CGMA; and Lily Ang, CPA.

The Steve Tillinger Memorial Scholarship and the Willie Hornberger Scholarship funds were established within the AEF. At the time of the meeting, both had more than \$30,000 toward the \$50,000 goal for endowment.

A silent auction to support scholarships was held, with many items donated by chapters or members. Auction proceeds and meeting contributions were more than \$27,000. As part of the AEF fundraising, a 50/50 raffle was held where half of the money raised was designated for the AEF and half was given to the individual whose name was drawn at the meeting. The raffle winner, Rene Pena CPA-El Paso, donated his share to the AEF. After the meeting, he said, "I hope that all members will take up the challenge to [make a contribution](#)."

## CPA-PAC

Terri Hornberger, CPA-Dallas, chairman of the CPA-PAC Steering Committee, explained that the purpose of the [CPA-PAC](#) is to encourage members to participate in the Texas election process. Chapters play a large role in encouraging members to play their part, especially through [donations](#).

## Governance

Christi Mondrik, JD, CPA-Austin, chairman of the Bylaws Task Force, provided an overview of proposed bylaws amendments. The board approved presenting them to the members for a vote in August.

On behalf of the Governance Committee, its Chairman Stephen Parker, CPA-Houston, requested feedback on possible revisions to the Society's governance model.

Tim Pike, CPA-Dallas, CFE, chairman of the Membership Task Force, asked for input on potential changes to build a membership model based on individual choice.

Financial reports and budgets were presented by Treasurer Melanie Geist, CPA-San Antonio, and TXCPA's CFO Edie Cogdell, CPA-Dallas, CGMA.

## Connections

To encourage interaction, a scavenger hunt was held where most of the "items" sought were fun facts about other attendees. There was a drawing of completed cards, with the prize of a two-night stay at the Sheraton in Austin for the Midyear Board of Directors Meeting and Advocacy Day in January. Kenny Broom, CPA-Dallas, was the winner.

Julie Sigety, CPA-Austin, won the drawing from names of first-time attendees. The prize was a one-year subscription to [TXCPA Passport](#), an on-demand CPE bundle.

## Plan Now for Future Gatherings

Advocacy Day will be Jan. 24, 2023, and the Midyear Board of Directors and Members meeting is planned for Jan. 25, at The Sheraton at the Capitol in Austin. [Reserve your room now!](#) Watch the weekly Viewpoint e-newsletter for meeting registration information.

The Worthington Renaissance Fort Worth Hotel is the site for the 2023 Annual Meeting of Members and Board of Directors Meeting, June 23-24. Make your plans now to be there!



The graphic features a dark blue background with the TXCPA logo at the top center. On the left, the text reads "Visit the Knowledge Hub from the Texas Society of CPAs". On the right, a laptop displays the TXCPA Knowledge Hub website interface, which includes a search bar, navigation menu, and several article thumbnails such as "TXCPA Monthly Minute" and "The Future of Technology in Accounting". At the bottom, a white text box states "The Knowledge Hub consists of vendor-sponsored content designed to be helpful in your practice." Below this is a large blue banner with the URL "TXCPAHub.org" and a QR code in the bottom right corner.