

Awards Selected by the Chapter Coordinating Committee

Chapter Awards

The Chapter Coordinating Committee Steering Subcommittee is responsible for selecting the recipients of the following awards: Outstanding Small Chapter and Outstanding Medium Chapter. From time to time, a Most Improved Chapter Award may be presented.

Outstanding Chapter Award recipients will be selected on the basis of information provided on the Outstanding Chapter Award Entry Form.

Most Improved Chapter: Selected when appropriate to acknowledge a chapter that significantly advanced its services to members and the community in a given year.

Presentation: All chapter awards will be presented at the TXCPA Annual Meeting with sufficient information about achievements to acknowledge the chapters receiving the award.

Recognition of Chapter Award Recipients: The chapter president whose leadership was instrumental in the chapter's receipt of the award will receive a plaque. The chapter will receive appropriate recognition.

All award recipients will be acknowledged by a brief account of accomplishments that resulted in receiving the award. Awards and their recipients will be publicized in appropriate TXCPA publications.

YEAR-END REPORT FORM
2022-2023 OUTSTANDING TXCPA CHAPTER AWARD

DUE: MAY 20, 2023

This form constitutes the chapter annual report.

Entry form must be received at TXCPA by midnight, May 20, 2023, to be considered for an Outstanding Chapter Award.

Please complete this form and email to Rori Shaw (rshaw@tx.cpa).

By sending it to TXCPA, the chapter agrees to allow the completed form to be posted on the Internet after it is received.

Chapter: TXCPA Southeast Texas

President: David Rose, CPA

President email: drose@lamar.edu

Executive director/secretary: Rori Shaw, CAE

Executive director/secretary email: rshaw@tx.cpa

Please fill in the following:

Number of members June 2022:	<u>358</u>
Number of members April 2023:	<u>355</u>
Number of new members:	<u>33</u>
Number of member reinstates:	<u>8</u>
Number of hours of CPE programming provided by chapter:	<u>24</u>

List your chapter goals for each area listed below and provide details on the outcomes, any available metrics, and information about the work done towards these goals.

Community and Membership

1. Achieve the milestone of 360 chapter members.

The chapter did not reach the milestone of 360 chapter members but made membership a priority by reaching out to prospective members to invite them to join and participate

in chapter events. Board members connected with nonmember CPAs they knew with a personal invitation.

2. Achieve 93% overall retention and actively engage with new licensees.

The chapter reached 92% overall retention of chapters members. We fell just short of our retention goal. The chapter board worked hard to reach out to those who had not renewed their membership before drops in September.

3. Reach 10 percent of members with local engagement.

More than 200 members participated in the chapter's annual school supply drive over the summer. The chapter also volunteered with hundreds of others packing thousands of meals for children in Uganda with the Richard Gagne Charitable Foundation.

Pipeline

4. Reach 250 college and high school students.

Action items included providing a panel discussion for a Beta Alpha Psi meeting at Lamar University, speaking to accounting students about the profession in the classroom and at career fairs, hosting a chapter table at Lamar University's Meet the Firms event, and hosting a booth at the Southeast Texas Career Expo. At the Career Expo in February there were more than 3000 students in attendance, 35 schools and 133 exhibitors. The chapter had a Plinko board with treats for students to learn more about accounting as a career. The chapter also made a career presentation at Warren High School during CPA Week! At Port Neches-Groves High School, 17 students in Austin Begnaud's accounting class recently learned about opportunities in the accounting profession. The chapter's Career Awareness Committee chair, Morgan Birdwell, CPA, led the presentation, which also featured board members Christa Wofford, CPA, and president David Rose, CPA.

5. Reach 75 elementary and middle school students.

Each year, the chapter hosts a school supply drive for a school in need within the TXCPA Southeast Texas chapter area. This year was the chapter's 15th consecutive year. More than 210 volunteers participated and more than 250 students were impacted at the beneficiary school!

6. Provide accounting scholarship funding of \$8000.

The chapter raised \$4,662 for chapter scholarships this year soliciting donations through a letter writing campaign and doing a split the pot drawing at the Federal Tax Update. The chapter donates \$1000 to the endowed scholarship they created at Lamar University each year.

Professional Excellence

7. Provide 40 hours of live CPE programming.

The chapter provided 24 hours of live CPE programming. This year was the first time offering live programming since 2020. At the Federal Tax Update in January, there were more than 150 attendees!

Advocacy

8. Achieve CPA-PAC contribution goal of \$3000 for the 2022-2023 PAC year (April -March).

The chapter received \$2,065 in PAC contributions and surpassed their official PAC goal set by TXCPA of \$1,728! The chapter included blurbs in newsletters and sent eblasts during the year encouraging PAC donations.

9. Obtain CPA-PAC donations by 100% of eligible members on the 2022-2023 TXCPA Board of Directors.

The chapter received CPA-PAC donations by 83% of eligible members on the 2022-23 TXCPA Board of Directors.

OPTIONAL: List any other activities, programs and services not mentioned above in your goals that were offered by the chapter (or new to the chapter).

- At TXCPA's Annual Meeting of Members on July 1, 2022, chapter member Larry Begnaud, CPA, was honored with the Distinguished Public Service award. When CPA-PAC awards were presented in the meeting, the recognition for Highest Percentage of Fundraising Goal was given to TXCPA Southeast Texas and accepted by chapter Regulatory and Legislative Committee Chair Josh LeBlanc, CPA.
- Marylyn Byrd, Sheri Del Mage, Chip Majors, David Rose, Erik Angelle and Jeremy Triska served terms as a TXCPA Directors.
- Nine chapter members serve on 14 TXCPA committees.