

## 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  
OUTSTANDING TXCPA CHAPTER AWARD**

**DUE: MAY 20, 2026**

This form constitutes the chapter annual report.

**Entry form must be received at TXCPA by midnight, May 20, 2026, 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:** Chip Majors, CPA

**President email:** chip@wdjcpa.com

**Executive director/secretary:** Rori Shaw, CAE

**Executive director/secretary email:** rshaw@tx.cpa

**Please fill in the following:**

|   |     |
|---|-----|
| Number of members June 2025:                            | 329 |
| Number of members April 2026:                           | 334 |
| Number of new members:                                  | 38  |
| Number of member reinstates:                            | 8   |
| Number of hours of CPE programming provided by chapter: | 43  |

**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 365 chapter members**

As of May 17, 2026, TXCPA Southeast Texas has 332 members. While the chapter did not meet its membership goal, significant efforts were made to recruit new members and engage the accounting community.

To support membership growth:

- The chapter participated in TXCPA's statewide campaign to reach prospective members.
- A list of nonmembers was shared with the board, and board members personally reached out to CPAs they knew who had not yet joined.
- The chapter placed a strong emphasis on promoting free student membership, engaging with university students and faculty across the region.

These initiatives laid a strong foundation for future growth and helped build awareness of the value of TXCPA membership.

**2. Achieve 93% overall retention of chapter members.**

TXCPA Southeast Texas achieved an 89% overall member retention rate this year. Although the chapter fell short of its goal, this result reflects its strong commitment to member engagement and support.

To help ensure renewals ahead of the annual membership drop in September, chapter board members conducted personal outreach to individuals who had not yet renewed. These efforts played a key role in encouraging continued involvement and reinforcing the value of membership.

Additionally, the chapter president and executive director actively welcomed new members, including new licensees, by sharing information about TXCPA and how to get involved in the Southeast Texas chapter. These touchpoints helped foster a sense of community and connection early in the membership journey.

**3. Provide opportunities for members to be involved in both advancing the profession and serving the community.**

Action items included providing a community service project for chapter participation during CPA Month of Service, contacting new CPAs, offering a networking event and offering chapter meetings for networking and learning.

TXCPA Southeast Texas offered multiple opportunities for members to connect, learn, and give back. These activities helped foster deeper member relationships and promote professional camaraderie.

**Community Service:**

The chapter supported the School Tools Program through the Southeast Texas Food Bank, which provides school supplies to economically disadvantaged students across eight counties and serves approximately 1,400 teachers annually. Members contributed via Amazon wishlist purchases, supply drop-offs at locations in Beaumont, Port Arthur, and Orange, or monetary donations designated for the drive. Chapter volunteers and students also participated in a School Tools service event, creating direct community impact.

For Month of Service, members donated supplies and/or funds to Sleep in Heavenly Peace, a local volunteer-driven nonprofit that builds and delivers beds to children without a bed or sleeping on the floor.

#### **New CPA Outreach:**

The chapter president played an active role in outreach by contacting new licensees each month to welcome them to TXCPA and share opportunities to connect with the East Texas chapter.

#### **Networking Events:**

The chapter also created an informal networking series, "Chip Chats," featuring Chapter President Chip Majors. These gatherings offered members a chance to have coffee with Chip, exchange perspectives, grow relationships, and stay connected to the profession..

#### **Chapter Meetings:**

- February Chapter Meeting with Bankers and Estate Planners – 28 attendees. The Greater Beaumont Chamber of Commerce gave an economic with 1 hour of CPE offered.
- Spring Chapter Meeting at Lamar University – 40 total attendees (26 professionals, 14 students). Featured speaker Billy Kelley, CPA, delivered an inspiring keynote. The event also included scholarship and award presentations.

These events successfully connected members across generations and professional roles, achieving the chapter's engagement objective and strengthening ties within the local CPA community.

### **Pipeline**

1. **To continue, grow, and strengthen awareness of accounting as a career, the CPA license, and financial literacy by reaching at least 550 students across elementary, middle, and high schools, as well as junior colleges and universities through coordinated outreach and educational programming led by the Pipeline Committee.**

TXCPA Southeast Texas made meaningful progress this year in promoting the accounting profession and supporting local education through community outreach, school engagement, and student involvement.

#### **Supporting Local Educators: School Tools Donation**

We are incredibly proud of the impact our chapter made through the School Tools Program at the Southeast Texas Food Bank. Thanks to the generosity of our members, we donated over \$2,000 in school supplies to help teachers and students in the Beaumont community.

#### **High School Engagement**

The chapter actively reached out to high schools across the region, offering classroom presentations on accounting careers and financial literacy. Highlights include:

- Southeast Texas Youth Career Expo – On February 5, 2026, the chapter participated in this large-scale event at Ford Park. With over 3,500 students from 40 schools in attendance, the TXCPA Southeast Texas booth welcomed nearly 500 student visitors and held approximately 150 meaningful conversations with students about accounting, making it one of the event's most active booths.

### **College-Level Engagement**

Our chapter also remained focused on building relationships with future CPAs through campus outreach:

- For Accounting Opportunities Month in November, the chapter partnered with the Accounting Department at Lamar University to host CPA Chats and related student engagement activities. Events included an informal meet and greet with CPA volunteers, a workshop on filing the CPA exam letter of intent, and classroom speaker sessions, collectively reaching more than 80 students. The chapter also hosted a CPA Chats session for online Managerial Accounting students on November 10, featuring Ryan Whipple answering student questions and providing professional insight.
- Participated in Lamar's Meet the Firms event and presented at Beta Alpha Psi meetings, strengthening relationships with faculty and students.
- Held the Spring Chapter Meeting at Lamar University with 40 attendees (26 professionals, 14 students). The event featured an inspiring keynote from Billy Kelley, CPA, and recognized outstanding students and faculty with scholarship and excellence awards.

Other Engagement:

- For Month of Service, the chapter also sent six money-minded books Jones-Clark Elementary School in Beamont. Eight Lamar accounting students also read to 160 students across eight kindergarten and first-grade classrooms.

These efforts demonstrate TXCPA Southeast Texas' commitment to building awareness of the accounting profession and investing in the next generation of CPAs.

## **2. Provide accounting scholarship funding of \$2,500.**

TXCPA Southeast Texas continued its commitment to supporting the next generation of accounting professionals through scholarship fundraising and awards.

This year, the chapter raised \$7,200 in scholarship funds through a fundraising campaign. As a result:

- Two scholarships were awarded to deserving Lamar University students for the upcoming academic year totaling \$4,000.
- An additional \$1,000 contribution was made to the chapter's Endowed Scholarship Fund at Lamar University, helping to ensure long-term support for future accounting students.

These efforts reflect the chapter's dedication to education and the advancement of the profession in Southeast Texas.

### **Advocacy**

- 1. Achieve CPA-PAC donation goal of \$1,540 for the 2025-2026 PAC year (April–March).**
- 2. Achieve 100% participation in CPA-PAC contributions from all eligible members of the 2025–2026 TXCPA Southeast Texas Board of Directors.**

The chapter raised \$2,030, surpassing its PAC fundraising goal, with strong board participation—highlighting a clear commitment to leadership support.

To raise awareness of the PAC's importance and encourage member support, the chapter undertook several initiatives throughout the year:

- Included informational blurbs in chapter newsletters
- Sent personalized letters to past contributors
- Delivered PAC reminders at every chapter board meeting

TXCPA Southeast Texas remains dedicated to supporting advocacy efforts that protect and advance the accounting profession, and we will continue to emphasize PAC awareness and engagement in the year ahead.

### **Learning**

- 1. Provide 40 hours of live CPE programming.**

TXCPA Southeast Texas delivered a robust lineup of continuing education opportunities in 2025–26, offering a total of 43 hours of CPE.

Course offerings included:

- Annual Standards Update
- Modern Business and Family Law for Accountants
- K-1 Prep, Interpretation and Analysis
- Federal Tax Update
- Breakfast CPE Series: Five focused 2-hour courses on timely topics
- February Chapter Meeting: one hour of CPE

These diverse and relevant programs reflect the chapter's continued commitment to supporting the evolving professional development needs of its members with high-quality, accessible education.

**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 June 26, 2025, two Southeast Texas members received prestigious state honors:
  - Marylyn Byrd was recognized as *Young CPA of the Year* for her significant contributions to the accounting profession and the community.
  - Josh LeBlanc was recognized as *Committee Chair of the Year* for his outstanding performance as chair of the Legislative Advisory Committee,
- Josh LeBlanc represents Southeast Texas on the TXCPA Board of Directors, ensuring our region has a strong voice at the state level.
- Southeast Texas is well-represented on the TXCPA Leadership Council, with members: Marylyn Byrd, Megan Gallien, Josh LeBlanc, Chip Majors and David Rose.
- Further demonstrating our commitment to statewide leadership and service:
  - Eight chapter members served on 15 TXCPA statewide committees this year.
  - 21 members served on TXCPA Southeast Texas chapter committees.

These contributions reflect the strong spirit of volunteerism and leadership within our chapter. We are proud of all who serve and represent Southeast Texas so well.