



TXCPA Austin Annual Action Plan (2024-25)

Vision: Empower our members to lead and succeed

Mission: Advance the interests of CPAs and the accounting profession through advocacy, access to knowledge, community connections, and career development.

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

Chapter Description: TXCPA Austin serves approximately 2,500 members in 13 counties in the Central Texas area. Our chapter is led by a 10-member Executive Board and an Oversight Council consisting of TXCPA Leadership Council Members (both chapter and state elected), past presidents, and Members-at-Large. TXCPA Austin strives to elevate the standard of proficiency, integrity and character of the profession; to cultivate professional cooperation and social interaction among members; and promote cooperation with the Texas Society of CPAs and other CPA organizations for the advancement of the profession of public accountancy.

CHAPTER PLANNING MATRIX

TXCPA Pillar of Success – Community & Connection

Chapter Activity, Program or Service	Goal(s)	Volunteer Leader(s) or Committee Responsibility	Budget Impact	Status
Circulate Prospect List among EB/OC members	Achieve the milestone of 2,500 chapter members, with 1,900 being CPA members.	EB & OC	None	
Emails to DROP list	Achieve 85% overall retention of chapter members	Staff, EB	None	
Circulate DROP list among EB/OC	Achieve 85% overall retention of chapter members	EB & OC	None	
New Member Contact	Reach 25% of unique members	Staff, VP Member Services	None	

	with local engagement.			
Newsletter, Social Media, Website	Achieve 85% overall retention of chapter members. Reach 25% of unique members with local engagement.	Staff	None	
Outreach to all 13 counties (road show)	Achieve the milestone of 2,500 chapter members, with 1,900 being CPA members. Achieve 85% overall retention of chapter members Reach 25% of unique members with local engagement.	Staff, EB, OC	\$1,000	
Participation in Swearing-in Ceremony	Achieve the milestone of 2,500 chapter members, with 1,900 being CPA members.	Volunteers	None	
New Licensee Welcome Event	Achieve the milestone of 2,500 chapter members, with 1,900 being CPA members. Reach 25% of unique members with local engagement.	Volunteers/Staff	\$1,000	
Outreach to Firms not in PGM	Achieve the milestone of 2,500 chapter members, with 1,900 being CPA members. Achieve 85% overall retention of chapter members.	Staff, VP of Member Services	None	
Holiday Party	Reach 25% of unique members with local engagement.	Staff	\$2,000	

Volunteer Appreciation/Awards Party	Reach 25% of unique members with local engagement.	Awards Committee/Staff	\$3,000	
Bring a Friend Campaign	Reach 25% of unique members with local engagement.	EB & OC	None	
LEAP Activities	Reach 25% of unique members with local engagement.	LEAP Committee/Staff	\$750	
Application of Intent Workshop	Reach 600 students at local universities, elementary, middle and high schools.	Staff	\$100	
Interview/Resume Workshop	Reach 600 students at local universities, elementary, middle and high schools.	Volunteers/Staff	\$100	
Mock CPA Exam	Reach 600 students at local universities, elementary, middle and high schools.	Volunteers/Staff/ TXCPA	\$100	Partner with TXCPA to offer in-person component.
Community Service Events	Reach 25% of unique members with local engagement.	Staff, VP of Community Involvement	\$750	
Social Events	Reach 25% of unique members with local engagement.	Volunteers/Staff	None	
Early Career Connections/Mentor Program	Provide early career connections to 25 students, candidates, or early career individuals. Reach 600 students at local universities, elementary, middle and high schools.	Volunteers/Staff	\$900	

Chapter Activity, Program or Service	Goal(s)	Volunteer Leader(s) or Committee Responsibility	Budget Impact	Status
Tax Conference	Provide 49 hours of quality CPE programming.	Tax Conference Committee/Staff	\$18,000	Two days in early November (16)
FREE CPE Expo	Provide 49 hours of quality CPE programming.	CPE Committee/Staff	(\$500)	August 27 & 29 (8)
Accounting and Finance Leaders Conference	Provide 49 hours of quality CPE programming.	AFL Committee/Staff	\$10,000	One day in April (8)
Annual Meeting	Provide 49 hours of quality CPE programming.	Staff	(\$2,000)	January (1)
Tax Updates	Provide 49 hours of quality CPE programming.	CPE Committee/Staff	\$9,000	Individual and Business Tax Updates (16)

TXCPA Pillar of Success – Advocacy

Chapter Activity, Program or Service	Goal(s)	Volunteer Leader(s) or Committee Responsibility	Budget Impact	Status
PAC Fundraising/Key Persons	Achieve PAC contribution goal of \$12,180. Achieve 5% member participation in the PAC.	PAC Committee/Staff	None	Ongoing fundraising; plan event; include spiel in communications
Legislative Update for members (CPE)	Achieve PAC contribution goal of \$12,180. Achieve 5% member participation in the PAC.	Staff	None	
"Why I give" Campaign	Achieve PAC contribution goal of \$12,180. Achieve 5% member participation in the PAC.	Staff	None	

School/University Road Show	Reach 600 students at local universities, elementary, middle and high schools.	Volunteers	\$300	
Career Day Outreach	Reach 600 students at local universities, elementary, middle and high schools.	Staff/Volunteers	None	
Ensure Faculty and Student Ambassadors are assigned for all eligible schools	Reach 600 students at local universities, elementary, middle and high schools.	Staff/Volunteers	None	
Scholarships	Provide local scholarship funding by raising \$7,500.	Scholarship Committee/Staff	\$10,000	
Scholarship Fundraising Event(s)	Provide local scholarship funding by raising \$7,500.	Committee/Staff	\$2,000	
Peer-to-Peer Scholarship Fundraising Campaign	Provide local scholarship funding by raising \$7,500.	Committee/EB/OC	None	

CHAPTER GOALS

Community and Membership

Recruitment	Achieve the milestone of 2,500 chapter members, with 1,900 being CPA members.
Retention	Achieve 85% overall retention of chapter members.
Engagement	Reach 25% unique members with local engagement.

Pipeline

Outreach & Awareness	Reach 600 students at local universities, elementary, middle and high schools.
Scholarships	Provide local scholarship funding by raising \$7,500.
Early Career Connections	Provide early career connections to 25 students, candidates, or early career individuals.

Advocacy

PAC	Achieve PAC contribution goal for 2024 fundraising year of \$12,180.
PAC	Achieve 5% member participation in the PAC

Learning

CPE	Provide 49 hours of quality CPE programming.
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