

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
2023-2024 OUTSTANDING TXCPA CHAPTER AWARD

DUE: MAY 20, 2024

This form constitutes the chapter annual report.

Entry form must be received at TXCPA by midnight, May 20, 2024, 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 East Texas

President: Heather Sanders, CPA

President email: hsanders@henrypeters.com

Executive director/secretary: Rori Shaw, CAE

Executive director/secretary email: rshaw@tx.cpa

Please fill in the following:

Number of members June 2023:	<u>914</u>
Number of members April 2024:	<u>918</u>
Number of new members:	<u>99</u>
Number of member reinstates:	<u>24</u>
Number of hours of CPE programming provided by chapter:	<u>72</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 milestone of 925 chapter members.

The chapter almost reached their goal of 925 with 918 members this year. This membership number surpassed their membership number from last year! The chapter participated in TXCPA's campaign to prospective members and reached out to those nonmembers to encourage

membership. A list of prospects was shared with board members and they reached out to CPAs they knew who were not members. Members also connected with students at universities within the chapter to tell them about free student membership.

2. Achieve 95% overall retention of chapter members.

The chapter wanted to challenge themselves with 95% overall retention this year. The chapter had 91% overall retention of chapters members. The chapter board worked hard to reach out to those who had not renewed their membership before drops in September. The chapter president reached out to new licensees each month welcoming them to membership and to give more information about how to engage with the chapter.

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, continuing to grow the leadership program offered by the chapter for the development of young CPAs; and offer a social event(s) for participation by members and students.

- The chapter hosted a toy drive benefiting Toys for Tots in December for TXCPA's Month of Service. Chapter members could buy money-minded toys from the chapter's Amazon Wishlist. We delivered many big boxes of toys to the warehouse in Tyler!
- The 2023 TXCPA East Texas Leadership Day was Thursday, November 30 in Kilgore, TX. This program was designed for young and aspiring CPAs with less than five years of work experience (or working toward a senior level position) in both public accounting and business/industry/government. The program focused on building confident, strong and effective leaders. PJ Dunn was the trainer. There were 16 participants.
- The chapter hosted a happy hour in Kilgore after Leadership Day for attendees, alumni and chapter leadership.
- The chapter hosted an end of year happy hour at Nip It Golf in Longview on May 1.

Pipeline

1. Continue, grow and strengthen Accounting Career Awareness (ACE) program and engagement with local high schools, junior colleges and universities utilizing new Pipeline Committee. Reach 450 college, high school, junior high and elementary students.

A new Pipeline Committee was created to engage the next generation of CPAs and work to provide student outreach and support accounting career education. The committee met the last Tuesday of every month. The chapter created a list of all schools and junior colleges in the chapter region. The chapter sent an email to all school districts in the chapter area offering presentations to schools on careers in accounting and/or financial literacy. The committee created educator request forms and volunteer request forms to help identify schools interested in presentations and chapter volunteers interested in giving presentations. The chapter made presentations or attended career fairs in Malkoff, Tyler, Yantis, Huntington, Elysian Fields, Henderson, Edgewood, Kilgore, and Hallsville.

The chapter participated in career fairs at ETBU, LeTourneau University, SFASU and UT Tyler. The chapter hosted a CPA2B Bootcamp at LeTourneau University on September 19 with 37 students in attendance. The students heard presentations on business and dining etiquette, the CPA exam application of intent and from a panel of local CPAs on their experiences taking the exam. The chapter also participated in UT Tyler's Meet the Firms event and the committee created a scholarship workshop for students at UT Tyler to increase scholarship applications.

2. Continue providing local scholarships with a fundraising goal of \$47,500.

The 2023 Tal Glenn Memorial Golf Tournament was October 23 at The Cascades in Tyler. The money raised at the tournament is used to provide scholarships for outstanding accounting students from East Texas or attending East Texas universities. Since inception in 1996, TXCPA East Texas has provided more than \$350,000 in scholarships. The tournament is a continued success and this year there was a 5% increase in net revenue. There were 28 sponsors and 23 teams this year. There was a revenue of over \$49,000 with a net revenue of more than \$36,000.

For the 2023-24 school year, the chapter awarded \$26,000 in scholarships to 10 deserving accounting students at four local universities.

Advocacy

1. Achieve PAC contribution goal for 2023-24 of \$4,200.

The chapter fell short of our PAC goal but did raise \$2380, which was 57% of our goal. The chapter include blurbs in newsletters, sent letters to past contributors in February and sent eblasts during the year encouraging PAC donations.

Learning

1. **Provide high-quality CPE that is accessible and affordable for members by providing at least 80 hours of CPE.**

The chapter offered 78 hours of CPE. Courses included an Annual Standards Update, tax updates including Partnerships and Estate Planning, Oil & Gas Tax, Leadership Day, Federal Tax Updates in Tyler, Longview and Lufkin and the annual CPE Expo. The chapter also offered an 8-hour webcast through its CPE Partnership with TXCPA.

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 23, 2023, TXCPA East Texas member Jennifer Reynolds received the Outstanding Educator Award!
- One TXCPA East Texas member was selected as 2023 TXCPA Rising Star: Kevan Kirksey!
- We have representation on the TXCPA Board of Directors. Amy Taylor is serving a three-year term on the TXCPA Board of Directors.

- We have great representation on the TXCPA Leadership Council including Misty de Wet, Mehgan Ibanez, Kathy Kapka (past TXCPA Chair) Brandon Mays, Stephanie Morgan, Royce Read, Heather Sanders, Tom Seale, Michael Thomas and Veronda Willis.
- Twenty chapter members serve on 18 TXCPA committees and 35 chapter members served on TXCPA East Texas committees. Volunteers are the heart of TXCPA East Texas, and we offer several ways for members to get involved!