

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, 2025

This form constitutes the chapter annual report.

Entry form must be received at TXCPA by midnight, May 20, 2025, 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: AJ Evans, CPA

President email: aevans@pw-tx.com

Executive director/secretary: Rori Shaw

Executive director/secretary email: rshaw@tx.cpa

Please fill in the following:

Number of members June 2024:	<u>930</u>
Number of members April 2025:	<u>923</u>
Number of new members:	<u>98</u>
Number of member reinstates:	<u>18</u>
Number of hours of CPE programming provided by chapter:	<u>101</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 925 chapter members

As of May 19, 2025, TXCPA East Texas has achieved a total of **927 members**, exceeding our annual goal of 925 and surpassing last year's membership total. This marks a significant accomplishment for the chapter and reflects strong engagement and outreach efforts.

To support membership growth, the chapter participated in TXCPA's statewide campaign targeting prospective members. A list of nonmembers was provided to board members, who then conducted personal outreach to CPAs they knew who were not currently members.

In addition, the chapter made a focused effort to promote free student membership by connecting with university students and faculty. Social media graphics and messaging were created to share with professors and students, as well as with board members and active volunteers, encouraging them to promote TXCPA East Texas membership on their personal and professional networks.

These coordinated efforts contributed to a successful membership year and further strengthened the chapter's presence across the region.

2. Achieve 92% overall retention of chapter members.

TXCPA East Texas achieved an impressive 91% overall member retention this year. This strong retention rate is a reflection of the chapter's dedicated efforts to engage members and support renewals.

In preparation for the annual membership drop in September, the chapter board made personal outreach to members who had not yet renewed. These efforts helped encourage continued participation and demonstrated the chapter's commitment to its members.

The chapter president also played an active role in member engagement by reaching out to new licensees each month, welcoming them to TXCPA and providing information about opportunities to connect with the East Texas chapter. These new licensees were also invited and recognized at the CPE Expo, reinforcing their value to the profession and the chapter.

To support the renewal period, custom social media posts highlighting TXCPA East Texas membership benefits were created and shared with board members to post on their personal networks. Additionally, the chapter conducted outreach to local firms and companies to promote the TXCPA Professional Group Membership program as a way to strengthen organizational involvement.

These combined efforts contributed to a successful year of both retention and engagement within 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.

Community Service – CPA Month of Service

In December, the chapter hosted a toy drive benefiting Toys for Tots during TXCPA's Month of Service. Members were invited to donate money-minded toys through an Amazon Wishlist or drop off items at three locations in Tyler, Longview, and Lufkin. Thanks to generous support from our members, we delivered multiple large boxes of toys to local Toys for Tots warehouses across the region.

2024 Leadership Day

The 2024 TXCPA East Texas Leadership Day was held on Wednesday, August 14, at Plaza Tower in Tyler, welcoming 22 participants. The event focused on developing strong and confident leaders in the profession.

- Clint Reese led sessions on active listening, assertiveness, authenticity, and imposter syndrome.
- Dana Garnett offered insights on building a fulfilling life.
- Kim Knox-Lewis provided tips and techniques for effective public speaking.

The day concluded with a leadership panel and wrapped up with a happy hour at Tru Vine Brewing Co., bringing together Leadership Day attendees and chapter leaders for fellowship and networking.

Social Events

In April, the chapter hosted two lively Behind-the-Scenes Brewery Tours to bring members together in a casual, fun environment. On April 23, members visited Oil Horse Brewing Co., and on April 24, the group gathered at ETX Brewing Co. Attendees enjoyed exclusive brewmaster tours, great food, and meaningful conversations—an excellent way to foster relationships and community within the profession.

These activities reflect the chapter's focus on providing meaningful opportunities for service, connection, and leadership growth among members and future CPAs.

Pipeline

1. **Continue, grow and strengthen Accounting Career Awareness (ACE) program and engagement with local high schools, junior colleges and universities utilizing the Pipeline Committee. Reach 550 college, high school, junior high and elementary students.**

TXCPA East Texas made significant strides this year in building the CPA pipeline and supporting accounting education across the region.

Pipeline Committee

The chapter established a Pipeline Committee last year dedicated to engaging the next generation of CPAs through student outreach and accounting career education. The committee met monthly on the second Wednesday to coordinate efforts and plan outreach initiatives. A comprehensive list of schools and junior colleges in the chapter's region was developed to ensure broad reach and equitable access.

The chapter sent outreach emails to every school district in the region, offering classroom presentations on accounting careers and financial literacy. To streamline communication, the chapter created:

- Educator Request Forms to capture school interest in hosting presentations.
- Volunteer Request Forms to identify CPAs and accounting professionals willing to present.

Through these efforts, the chapter delivered presentations or participated in career fairs in: Kilgore, Longview, Lindale, Hudson, Tyler, Henderson, Whitehouse, Huntington, Elysian Fields, Hallsville, and Mineola.

The chapter set a stretch goal of reaching 1,000 students—and surpassed that by reaching more than 1,200 students, exceeding the original goal by 219%!

University Outreach

TXCPA East Texas also prioritized engagement at the college level:

- Participated in career fairs at East Texas Baptist University (ETBU), LeTourneau University, Stephen F. Austin State University (SFASU), and the University of Texas at Tyler (UT Tyler).
- Hosted a CPA2B Bootcamp at SFASU on October 25. This full-day event featured sessions on the CPA exam, professional etiquette, and career skills, and concluded with a panel of experienced CPAs who provided advice and mentorship. The event drew 45 student attendees.
- Participated in UT Tyler's Meet the Firms event and spoke at Beta Alpha Psi meetings, further encouraging student membership and engagement.
- Contributed over \$3,500 to student accounting associations at UT Tyler, SFASU, and LeTourneau University, helping support student programming and professional development

These robust initiatives reflect the chapter's commitment to cultivating a strong, diverse, and informed pipeline of future CPAs across East Texas.

2. Continue providing local scholarships with a fundraising goal of \$50,000.

The 2024 Tal Glenn Memorial Golf Tournament was held on November 11 at The Cascades in Tyler. This signature event raises critical funds to support scholarships for outstanding accounting students from East Texas or attending universities in the region.

Since its inception in 1996, TXCPA East Texas has awarded more than \$375,000 in scholarships—demonstrating the chapter's long-standing commitment to the future of the profession.

The 2024 tournament continued that tradition of success:

- 34 sponsors and 24 teams participated
- Total revenue approached \$55,000
- Net revenue exceeded \$39,000, marking an 8% increase over the previous year

These funds directly supported the chapter's 2024–25 scholarship program. A total of \$36,500 in scholarships was awarded to 15 deserving accounting students from five local universities.

This annual event not only generates essential scholarship funds but also strengthens connections between members, firms, and the community in a meaningful and lasting way.

Advocacy

1. Achieve PAC contribution goal for 2024-25 of \$4,480 with 100% of board participation.

While the chapter fell short of its annual PAC fundraising goal, we proudly achieved 39% of our goal and are especially pleased to report 100% board participation in PAC giving.

To encourage contributions and raise awareness of the PAC's importance, the chapter took the following actions throughout the year:

- Included informational blurbs in chapter newsletters
- Sent personalized letters to past contributors in February
- Distributed targeted eblasts to members during key points in the year
- Offered free Government Affairs Update

The chapter remains committed to supporting TXCPA's advocacy efforts and will continue to prioritize PAC awareness and engagement in the year ahead.

Learning

1. Provide high-quality CPE that is accessible and affordable for members by providing at least 60 hours of CPE.

TXCPA East Texas offered a robust lineup of continuing education opportunities in 2024–25, delivering a total of 101 hours of CPE to members across the region.

Course offerings included:

- 16 hours of Governmental Accounting and Auditing Updates
- Annual Standards Update and Performing Compilations and Preparation Engagements
- Tax updates, including Individual Income Tax Update and S Corporation, LLC, and Partnership Update
- Leadership Day, focusing on professional and personal development
- Three Federal Tax Updates held in Tyler and Longview
- Ethics for CPAs
- The chapter's flagship event: the annual CPE Expo

Additionally, the chapter provided two free webcasts as a member benefit:

- Governmental Affairs Update
- Hot Topics in Estate Planning

The chapter partnered with other managed chapters to provide two specialized webcasts:

- Texas Sales Tax for the Construction Industry
- Texas Sales Tax for the Oilfield Services Industry

These diverse offerings reflect the chapter's ongoing commitment to providing relevant, high-quality education that supports the evolving needs of our members.

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).

TXCPA East Texas was proud to celebrate the accomplishments and leadership of our members at the state and local levels:

- At TXCPA's Annual Meeting of Members on June 28, 2024, two East Texas members received prestigious state honors:
 - Kathy Kapka received TXCPA's highest honor, the *Meritorious Service to the Accounting Profession Award*.
 - Tom Seale was recognized with the *Business & Industry Award* for his impactful career contributions in industry and to the accounting profession.
- Two members were honored as 2024 TXCPA Rising Stars:
 - Austin Fleet
 - Elsa Selleck
- Amy Taylor is currently serving a three-year term on the TXCPA Board of Directors, ensuring East Texas has strong representation at the state leadership level.
- We are also well-represented on the TXCPA Leadership Council, with members: AJ Evans, Mehgan Ibanez, Kathy Kapka (Past TXCPA Chair), Kevan Kirksey, Ruben Rodriguez, Heather Sanders, Tom Seale, Amy Taylor, and Veronda Willis.
- 18 chapter members served on 20 TXCPA statewide committees this year, and 36 members served on TXCPA East Texas committees.



Volunteers are truly the heart of TXCPA East Texas. We are proud of the many ways our members lead and contribute to the profession locally and across the state.