

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 Southeast Texas

President: Megan Gallien, CPA

President email: mgallien@gmjinc.com

Executive director/secretary: Rori Shaw, CAE

Executive director/secretary email: rshaw@tx.cpa

Please fill in the following:

Number of members June 2024:	<u>352</u>
Number of members April 2025:	<u>329</u>
Number of new members:	<u>31</u>
Number of member reinstates:	<u>4</u>
Number of hours of CPE programming provided by chapter:	<u>49</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 365 chapter members

As of May 19, 2025, TXCPA Southeast Texas has 329 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.
- The board also invited nonmembers to chapter events as a way to connect and encourage involvement.

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 a 93% overall member retention rate this year, meeting its goal and reflecting the chapter's 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. Reach 15 percent of members with local engagement.

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 three 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:

Thirteen volunteers, including four CPAs and eight Beta Alpha Psi students from Lamar University, participated in a School Tools service event, providing direct impact in the community.

New CPA Outreach:

Four new licensees were contacted and received TXCPA-branded swag as part of a personalized welcome.

Networking Event:

A happy hour on December 5 at Little Woodrow's Beaumont, sponsored by J. Nichols Law, drew members for casual networking and camaraderie.

Chapter Meetings:

- Fall Chapter Meeting – 30 attendees. Chapter President Megan Gallien shared updates, and Josh LeBlanc gave a legislative update.
- February Chapter Meeting – 37 attendees. Victor Padilla, CFE, presented on synthetic fraud and deepfake risks, with 1 hour of CPE offered.
- Spring Chapter Meeting at Lamar University – 40 total attendees (21 professionals, 19 students). Featured speaker Dr. Mohan Kuruvilla, 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. Reach 325 college and high school, middle and elementary school students.

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 \$4,000 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:

- Beaumont United High School – Chapter volunteers visited the school to speak directly with students about the opportunities in the accounting field.
- Southeast Texas Youth Career Expo – On February 6, 2025, the chapter participated in this large-scale event at Ford Park. With over 3,500 students from 40 schools in attendance, the TXCPA booth welcomed nearly 500 student visitors, 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:

- Lamar University Tailgate – On November 2, the chapter hosted a family-friendly tailgate at the Lamar football game, providing a relaxed atmosphere for members and students to connect.
- 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 (21 professionals, 19 students). The event featured an inspiring keynote from Dr. Mohan Kuruvilla, CPA, and recognized outstanding students and faculty with scholarship and excellence awards.

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 \$6,000.

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

This year, the chapter raised just under \$2,000 in scholarship funds. As a result:

- Two \$1,200 scholarships were awarded to deserving Lamar University students for the upcoming academic year.
- 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 2024-2025 PAC year (April–March).**
- 2. Obtain CPA-PAC donations by 100% of eligible chapter members on the 2024-2025 TXCPA Southeast Texas Board of Directors.**

While the chapter fell short of its annual PAC fundraising goal, we are proud to report that 89% of the goal was achieved, with strong participation from the board—a key indicator of leadership commitment.

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 2024–25, offering a total of 49 hours of CPE, including 41 hours of live instruction, to members across the region.

Course offerings included:

- Performing Compilations and Preparation Engagements
- Beneficial Ownership Reporting
- Pass-Through Tax Update
- Federal Tax Update
- Breakfast CPE Series: Four focused 2-hour courses on timely topics

In addition, 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 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).

- TXCPA Southeast Texas was proud to be recognized at the TXCPA Annual Meeting of Members on June 28, 2024, where the chapter received the award for Highest Percentage of PAC Fundraising Goal—achieving an outstanding 181.5% of our goal!
- 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:
 - Seven chapter members served on 12 TXCPA statewide committees this year.
 - 15 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.