

**Working with TSCPA to accomplish strategic plan goals focused on culture and community, career success, professional competency, and advocacy, the Corpus Christi Chapter worked on the following goals for the 2016-17:**

- Help members and prospective members **CONNECT** to each other.
- Increase the **VISIBILITY** of CPAs in the community.
- Offer local, **AFFORDABLE** CPE courses.
- Strengthen **RELATIONSHIPS** with local high schools, colleges, and universities to recruit new individuals to the profession.

**Goal: Help members and prospective members CONNECT to each other.**

Achievements:

- Offered **six** luncheon opportunities, each with one hour of CPE credit for the cost of the meal only. An **average of 54 people** attended each luncheon.
- Distributed monthly e-newsletters and targeted e-blasts to keep members informed about events. Some messages are sent using an email alias of the president's name or another board member's name to provide a more personal touch. Used member photos in e-newsletters.
- Provided an annual printed member directory, including member photos. This project is fully funded by advertising so there is **NO COST** for the benefit to our members.
- Hosted fourth annual Counting on Santa program for firms, companies, students, and other community groups to collect toys and monetary donations for Catholic Charities. Collected approximately 2,700 toys valued at **\$22,600**, which was **nearly double the amount** donated to Catholic Charities through Counting on Santa in the prior year. The program garnered coverage in the *Caller-Times* and on local TV stations and **continues to grow** each year.
- Recognized members who had contributed \$100 or more to the CPA-PAC by including special logos on their nametags. This is done in an effort to encourage others to donate to the CPA-PAC.
- Board members contacted prospective members to encourage them to join.
- Listed chapter events on the *Caller-Times* event calendar throughout the year.
- Promoted free online job and resume listings for CPAs, students, and candidates.
- Promoted the chapter Facebook page to keep members connected and apprised of chapter news. The page currently has **225 followers**.
- Chapter president and president-elect sent personal birthday emails to the membership throughout the year. The emails also included an invitation to attend upcoming chapter events.
- Chapter president and president-elect contacted potential drops to encourage their renewals.
- Invited new licensees to be recognized at luncheons. Each new licensee received a gift and was introduced to the membership and congratulated on obtaining his/her license.
- Sent hand-signed and hand-addressed "Happy New Years" greeting cards to non-member CPAs to encourage them to join and get involved in the chapter in the new year.

New Initiative:

- Young CPAs hosted their first event as a mixer with other young professionals groups in the area. Approximately **30 people attended**.

**Goal: Increase VISIBILITY of CPAs in the local community.**

Achievements:

- Sent media advisories promoting the installation of new officers and the Counting on Santa collections and round-up and received coverage in the *Caller-Times* and on local TV.

New Initiative:

- Sent groups of local volunteers to the Ronald McDonald House and to participate in a charity fun run as part of TSCPA's CPA Month of Service. **Over 40 people participated** in these events, and each volunteer wore a chapter CPA volunteer t-shirt.

**Goal: Offer local, AFFORDABLE CPE courses.**

Achievements:

- Offered a total of 31 hours of local CPE (eight hours hosted by the TSCPA CPE Foundation by request).
- Offered CPE for all six chapter luncheons
- Hosted the 59<sup>th</sup> Annual Tax Conference, offering up to nine hours of CPE. Net revenue exceeded budgeted net revenue by **32 percent** due to an increase in attendance and management of expenses.
- Offered a live four-hour ethics CPE program for members.
- Offered a four-hour technology CPE program.

New Initiative:

- Worked with the TSCPA CPE Foundation to offer an eight-hour Accounting and Auditing CPE course to meet the needs of a segment of the membership who do not work in tax and do not benefit from the Annual Tax Conference. **28 people registered for this course.**

**Goal: PROMOTE the CPA profession to local high school and university students.**

Achievements:

- Sent a special message to **31 local school district superintendents** and counselors at the local ISD to offer guest speakers and resources.
- Provided CPA guest speakers and materials for **14 high school and university visits and career fairs.**
- Hosted a "Meet the CPAs" luncheon providing students with the opportunity to meet local CPAs and offering resume booklets to CPAs in attendance. Students from Texas A&M Corpus Christi, Texas A&M Kingsville, and Del Mar College attended. Students were told about the chapter's online job bank and scholarships and made aware of local job opportunities. Attendance was **100 CPAs and students.** This was **double the attendance** of the prior year's luncheon.
- Invited student scholarship recipients to speak at the Meet the CPAs luncheon so CPAs could see how their contributions are helping future members and to give students in attendance greater awareness of the benefits of being involved with the chapter.
- Volunteers attended student accounting society meetings as guests and as speakers.
- Hosted a table at the Texas A&M Corpus Christi Accounting Firm Showcase and talked with students about the benefits of membership and involvement.
- Worked with members to host college student field trips to a public accounting firm in the fall and a nonprofit organization in the spring. **Total field trip attendance was 22 students.**
- Posted student resumes to the chapter's online job bank for free.
- The chapter mentor program continued and brought the **number of mentor/mentee matches to 68** since the beginning of the program.
- Held a silent auction and raised **nearly \$2,000 for local scholarships.**

New Initiatives:

- Built on the success of last year's accounting faculty, student accounting society officer, and chapter board mixer and invited participants from Texas A&M Corpus Christi, Texas A&M Kingsville, and Del Mar College to hear from TSCPA Chairman Kathy Kapka, CPA. **Attendance grew by 25%** over the prior year's mixer, and discussions included more about encouraging students to become CPAs and how TSCPA and the chapter can be a resource for them.