

CalCPA Community & Governance Modernization – Fact Sheet

Why Modernize?

CalCPA is modernizing to stay relevant, connected, and valuable in a profession that's evolving quickly. Member expectations have shifted toward flexibility, personalization, and ease of engagement, while participation, event attendance, and volunteer pipelines have declined under the traditional chapter-based model.

This modernization is about future-proofing CalCPA by simplifying governance, expanding leadership and volunteer pathways, and reimagining community as a statewide, interest-driven experience that still actively supports local connection. The goal is a more accessible, consistent, and engaging CalCPA—one that reduces administrative burden, leverages technology, and creates clearer, more meaningful ways for members to connect, learn, lead, and make an impact.

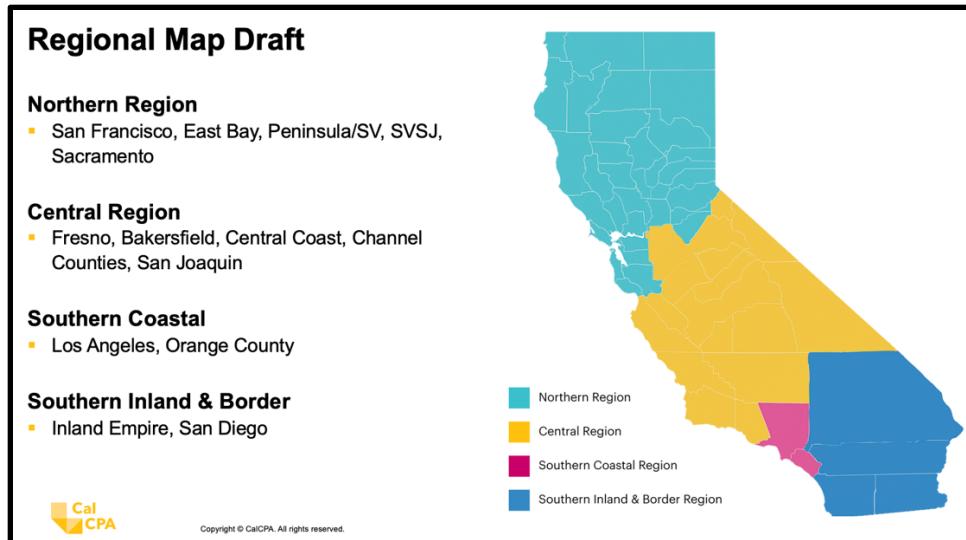
What's Changing?

- **Community & Engagement—Regional and Hyper Local:**
Moving from chapter-based borders to interest-driven model, with regions, that blends local connection with CA-wide opportunities.
- **Volunteer & Leadership Pathways—CalCPA Your Way:**
Expanding beyond chapter board roles to more flexible ways to contribute, lead, and shape strategy—at every career stage.
- **Governance & Structure—Modern and Future-Proof:**
Simplifying governance, reducing duplication, and clarifying roles so leaders focus on insight and influence, not administration.
- **Experience & Access—Technology Enabled Engagement:**
Using technology, consistent processes, and staff support to make it easier to participate, volunteer, and connect—without barriers.
- **Consistency with Local Flavor—Everything You Love and More:**
Preserving what members love (signature events, scholarships, sponsorships) while making them easier to scale and sustain statewide.

Regional Framework (Draft)

- Northern Region: San Francisco, East Bay, Peninsula/Silicon Valley, SVSJ, Sacramento
- Central Region: Fresno, Bakersfield, Central Coast, Channel Counties, San Joaquin
- Southern Coastal: Los Angeles, Orange County
- Southern Inland & Border: Inland Empire, San Diego

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Regional Member Data Draft

Region	City Centers	% of Members	Member Hotspot Areas
Northern	Sacramento, San Francisco, San Jose, Oakland, Walnut Creek	25-26%	Roseville, Chico, Santa Rosa, Napa, Sonoma, Livermore, Davis
Central	Fresno, Bakersfield, San Luis Obispo, Santa Barbara, Monterey, Stockton, Modesto	24-26%	Ventura, Ojai, Thousand Oaks, Visalia, Paso Robles, Salinas
Southern Coastal	Los Angeles, Pasadena, Long Beach, Irvine, Anaheim, Newport Beach	26-27%	Torrance/El Segundo, The Valley (Woodland Hills, Encino), Burbank/Glendale, Santa Monica, Century City/Beverly Hills, West LA/Santa Monica, San Clemente
Southern Inland & Border	Riverside, San Bernardino, San Diego	23-24%	Temecula, Vista, Palm Desert/Springs, Chula Vista, Redlands, Chino Hills

CalCPA

New Community Advisory Council (CAC)

- Purpose: Serve as the statewide bridge between local insight and CalCPA strategic direction, replacing legacy chapter leadership.
- Composition (Proposed):
 - Chair
 - Four Regional Directors
 - 2-3 Regional Representatives per Region
- 6 CAC members automatically serve on Council.

Purpose & Function



Statewide Bridge
Connecting grassroots local communities and CalCPA's strategic leadership.



Connect the Dots
Align strategy with local opportunities, surface insights, and activate local forums and engagement.



Advisory Role
Acts as a consultative body guiding priorities and amplifying local perspectives.



Conduit for Collaboration
Facilitates two-way communication between members and leaders to strengthen statewide unity.



CAC Composition - Proposed

Automatically on CalCPA Council (6):
▪ 1 Chair
▪ 4 Directors
▪ 1 Regional Rep.

1 Chair
• Rotates Regionally
• Selected by Nominations

1 Liaison
• CalCPA First Vice Chair of Board

CAC (15)

4 Directors
• 1 Per Region
• Selected by Nominations

9 Regional Reps
• 2-3 Per Region
• Application process

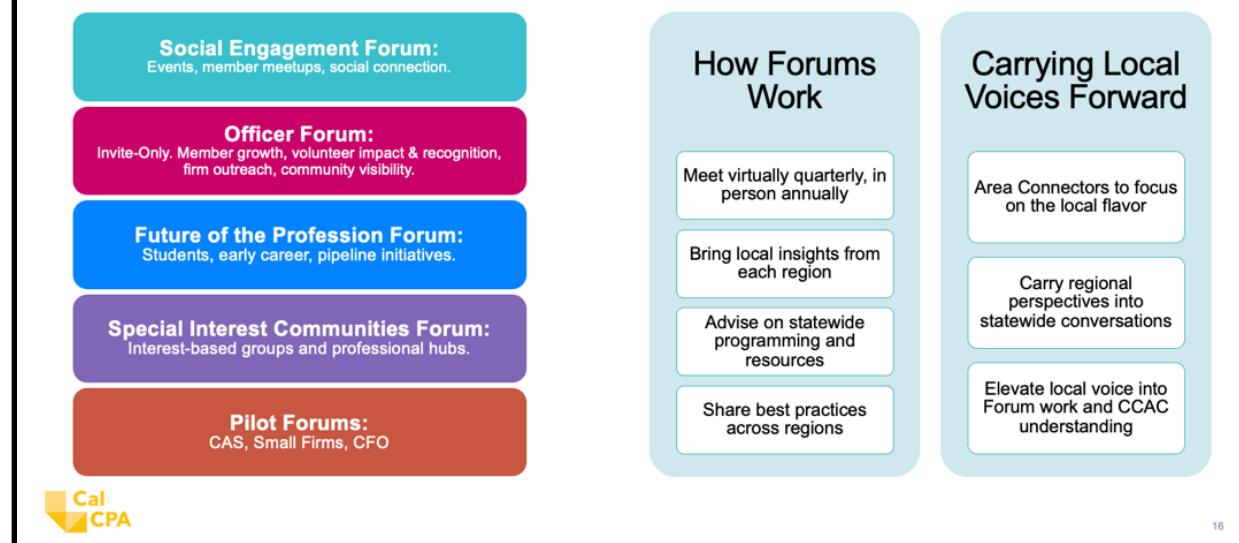


Community Forums

- Statewide, topic-based groups that replace legacy chapter committees.
- They organize programs, gather regional feedback through Area Connectors, and help ensure consistent, high-quality member experiences.

Community Forums Overview

Community Forums are statewide groups that organize engagement by topic, gather regional insight through the Area Connectors, and help shape consistent member experiences.



Community Engagement Overview—Meeting Frequency and Purpose

- CAC (Quarterly): Strategy and statewide priorities
- Community Forums (Bi-Monthly): Program design, outreach, and topic-based engagement
- Regional Leaders (Quarterly): Local insight, emerging needs, activation of Area Connectors

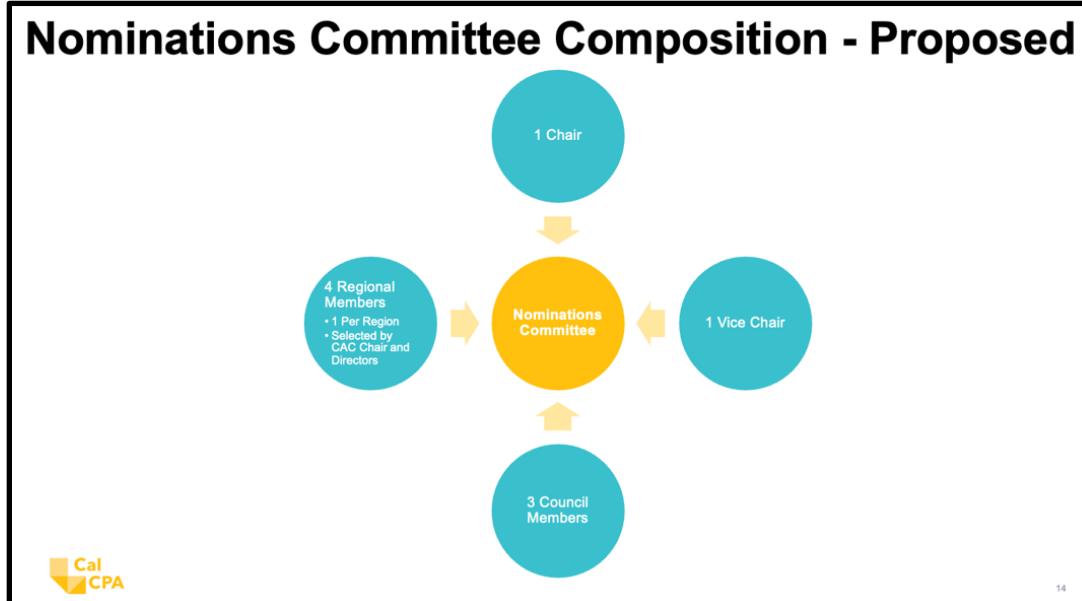
Governance Updates (Draft)

- Simplified and modernized bylaws
- Updated Council composition and terms
- Revised Nominations Committee structure
- Clear distinction between bylaws and policies
- Education Foundation dissolution impacts addressed

Council Composition	
Approx 95	Approx 65
15 Board Members	15 Board Members
10 Past Chairs	5 Past Chairs
14 Chapter Ps/VPs (automatic)	6 CCAC & 1 LIAC (automatic)
20+ State Committee Chairs	~25 State Committee Chairs
1 Per 1000 Voting Members ~25 reps (nominations)	8 Regional Reps, 2/region (nominations + regional member vote)
6 At-Large (nominations)	6 At-Large (nominations)



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Phased Transition Approach

- Gradual chapter board dissolution
- Clear transition timelines and communications
- Local Advisory Change Group support
- Personal outreach to Council members and past chairs

Community Engagement Phased Approach

	2026-27	2027 AND BEYOND
Structured Chapter Board Meetings	<	N/A
Formal Chapter Committees	➡	➡
Community Advisory Council	✓	✓
Forums	✓	✓
Signature Event “Planning” by CalCPA	✓	✓
Event “Outreach & Influence” by Members	✓	✓

What's Next

- Finalize governance recommendations and bylaws redline
- Member and chapter leader outreach and listening sessions
- Launch CAC, Community Forums with Area Connector model
- Launch engagement and event app
- Publish processes, calendars, and engagement pathways

Example of a Future Signature Event Coming to Life (Draft Process)

ABC NIGHT: FROM IDEA TO IMPACT

The ABC Night is a familiar Signature Event across California and provides a clear example of how this model works in practice. The process below shows how the work flows and where each volunteer body is engaged.

STEP 1: DIRECTION AND PRIORITIES: What should we offer, and where does it make sense?

This step focuses on confirming that ABC Night remains relevant and understanding *where* and *how* it should be offered.

Engagement at this stage includes:

- **Community Advisory Council**, reviewing trends across ABC Nights statewide
- **Regional Directors and Regional Reviews**, sharing insight on participation, demand, and timing
- **Area Connectors**, sharing what members are asking for locally
- **Staff**, providing attendance history and financial context

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Output: Clear direction on where ABC Nights should be held and what success should look like.

STEP 2: COORDINATION AND ACTIVATION | How does this move from idea to a planned event?

This step turns direction into a coordinated plan.

Engagement at this stage includes:

- **Focus-Based Forums**, reviewing upcoming ABC Nights
- **Forum Directors and Regional Forum Directors**, aligning focus and regional context
- **Forum Area Connectors and Area Connector Pool**, activating outreach and hosting support
- **Regional Directors**, ensuring local alignment
- **Staff**, confirming feasibility and calendar placement

Output: A confirmed ABC Night with timing, hosts, and outreach aligned.

STEP 3: EXECUTION AND DELIVERY | How does the event actually happen?

This step focuses on logistics, quality, and follow-through.

Engagement at this stage includes:

- **CalCPA Staff**
 - Manages venue selection and contracts
 - Oversees budgets and financial controls
 - Sets up registration and communications
 - Manages sponsorship fulfillment
 - Handles risk management and on-site execution
- **Area Connectors and Local Volunteers**
 - Personally invite members and firms
 - Serve as hosts and ambassadors at the event
 - Help ensure the event feels welcoming and locally connected
- **Officer Forum (when relevant)**
 - Supports outreach and visibility
 - Helps reinforce leadership presence and continuity

Staff owns execution so events happen consistently. Volunteers focus on connection and experience.

STEP 4: CLOSE, LEARN, AND ADJUST | How do we learn and improve?

This step ensures learning feeds back into the system.

Engagement at this stage includes:

- **Staff**
 - Finalizes financials and reporting
 - Applies scholarship allocations
 - Compiles attendance and engagement data

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- **Community Advisory Council**
 - Reviews trends and patterns across ABC Nights
 - Identifies opportunities for refinement or future focus
- **Regional Directors and Area Connectors**
 - Share qualitative feedback from participants

Output: Data and insight that inform future Direction and Priorities.