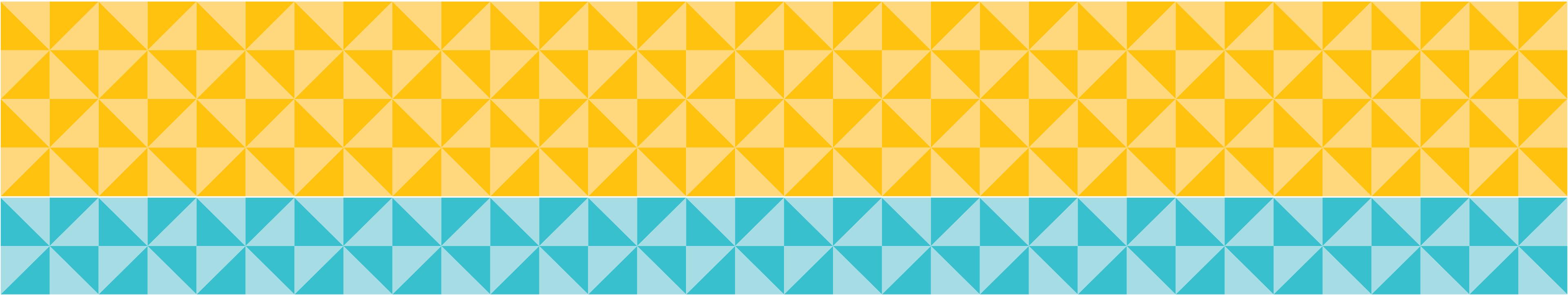




Community Engagement Framework



Regional Map Draft

Northern Region

- San Francisco, East Bay, Peninsula/SV, SVSJ, Sacramento

Central Region

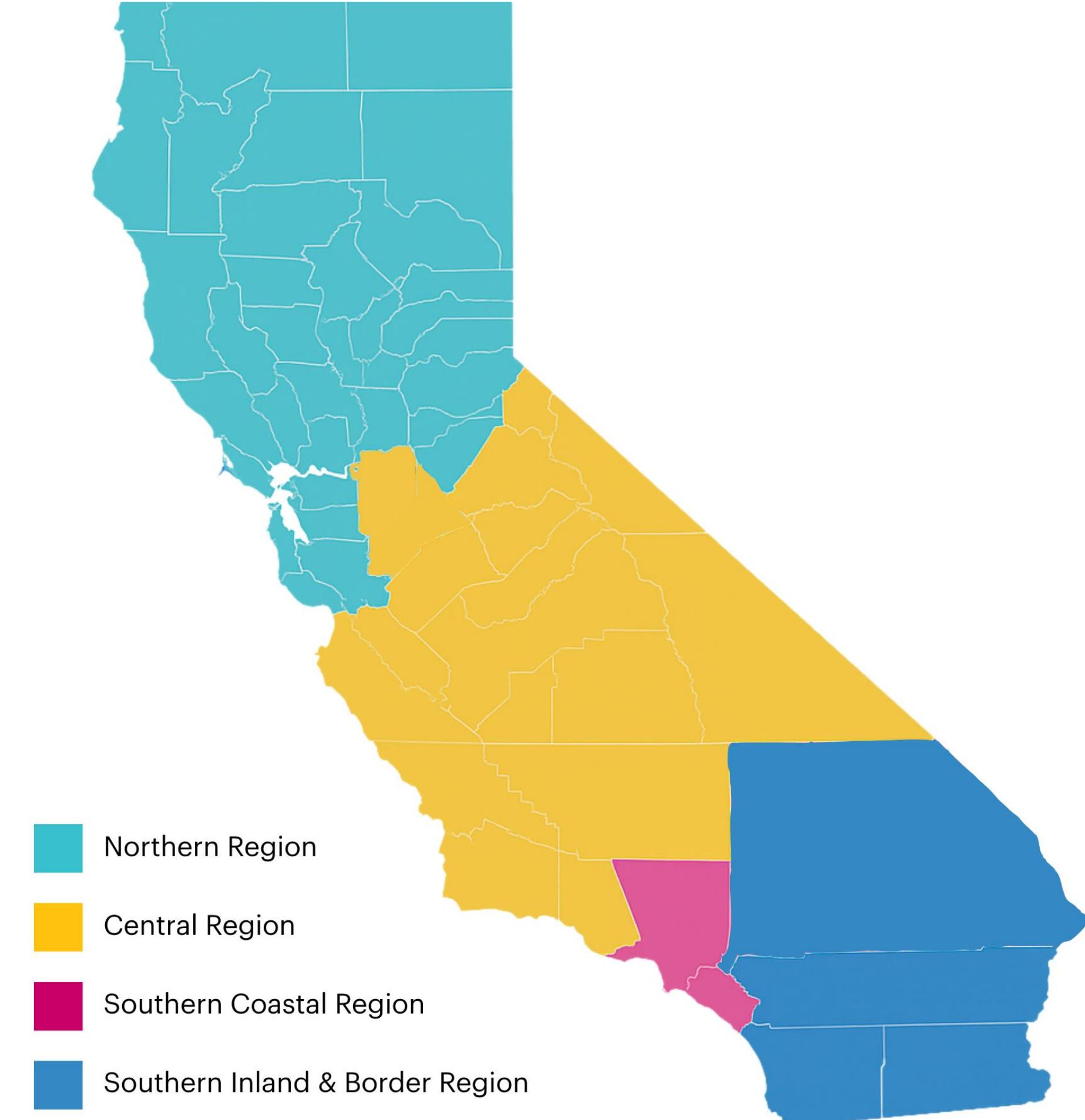
- Fresno, Bakersfield, Central Coast, Channel Counties, San Joaquin

Southern Coastal

- Los Angeles, Orange County

Southern Inland & Border

- Inland Empire, San Diego

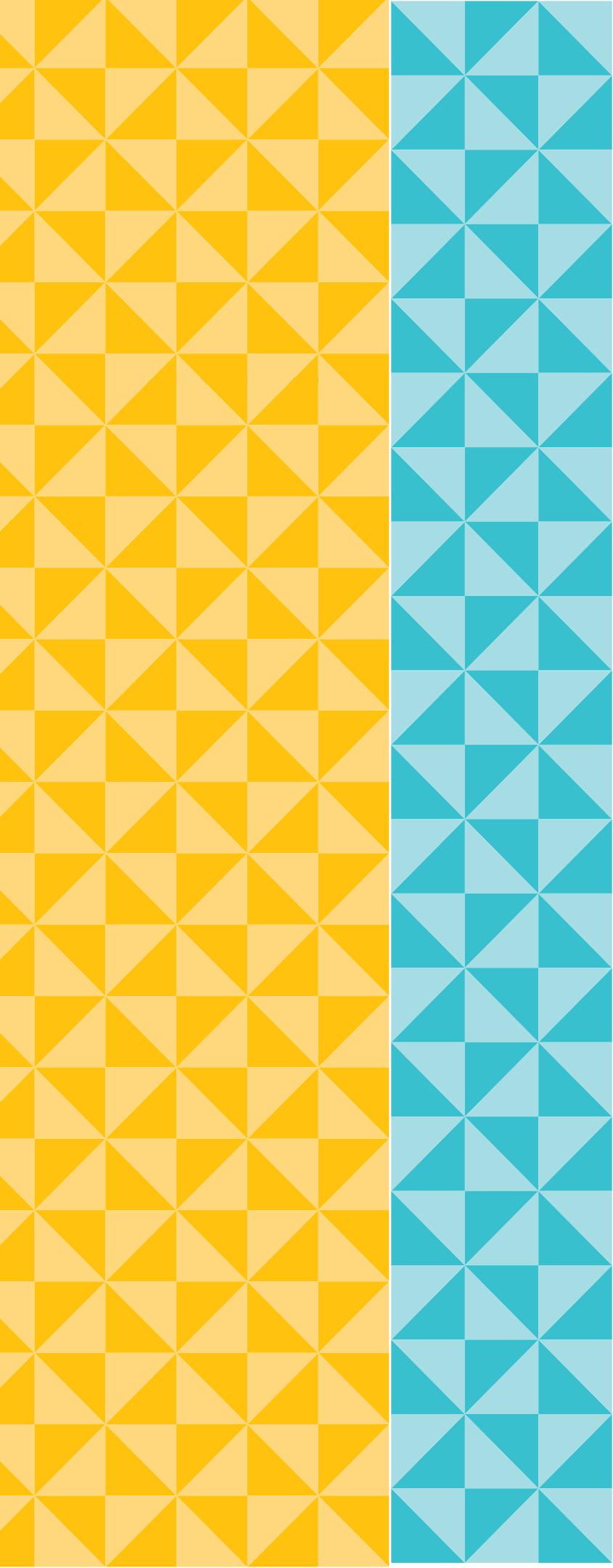


Regional Member Data Draft

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



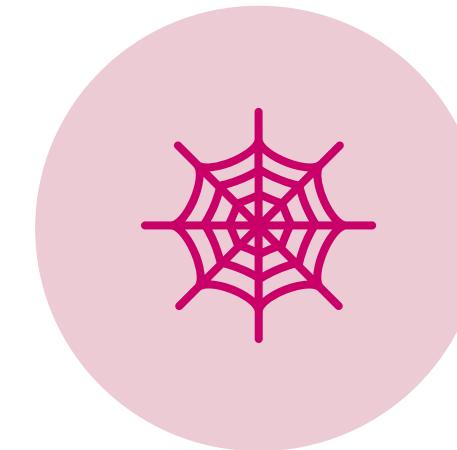
Community Connection Advisory Council



Purpose & Function



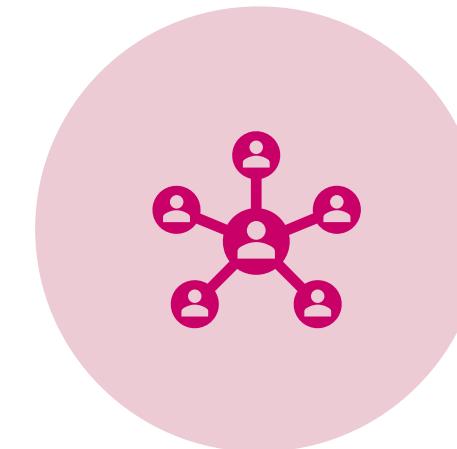
Statewide Bridge
Connecting grassroots local communities and CalCPA's strategic leadership.



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

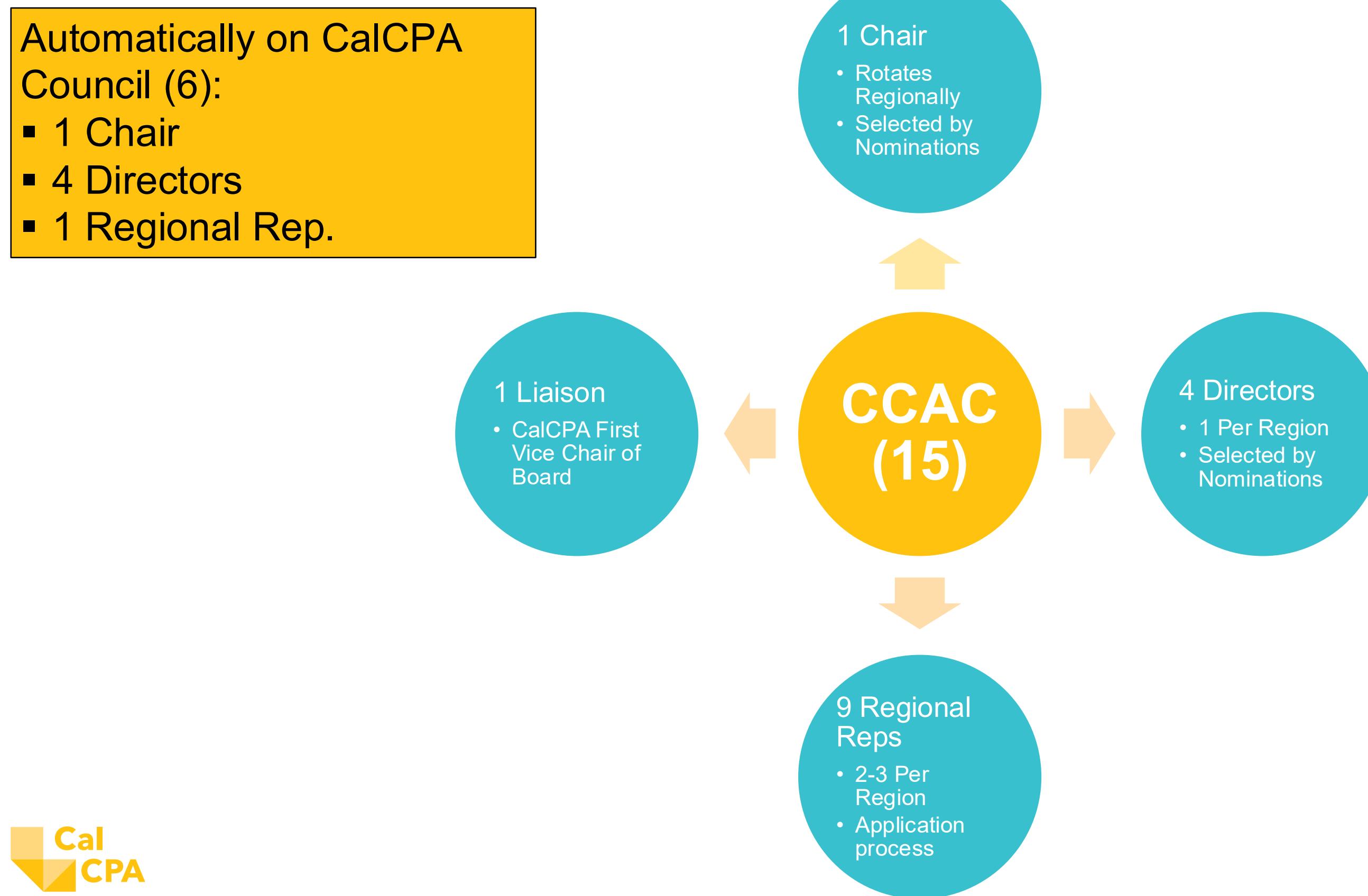


Advisory Role
Acts as a consultative body guiding priorities and amplifying local perspectives.



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

CCAC Composition - Proposed

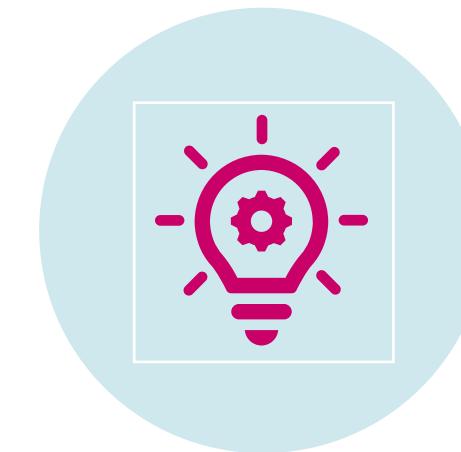


How the CCAC Will Work



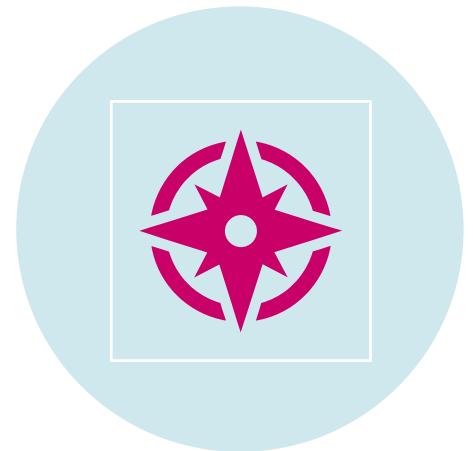
Meets Quarterly

Virtual, staff-enabled meetings throughout the year with one statewide in-person convening.



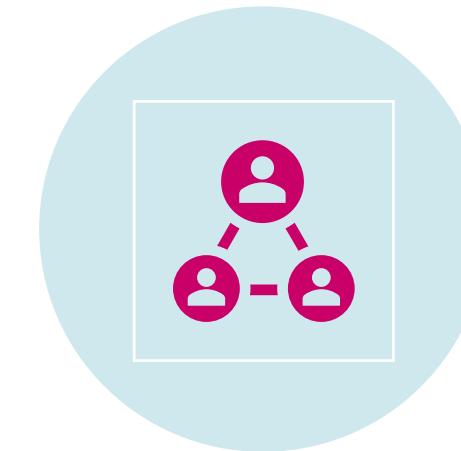
Shares Insights

Elevates local and regional perspectives that help guide engagement priorities.



Guides Priorities

Identifies emerging needs and opportunities based on statewide community activity.



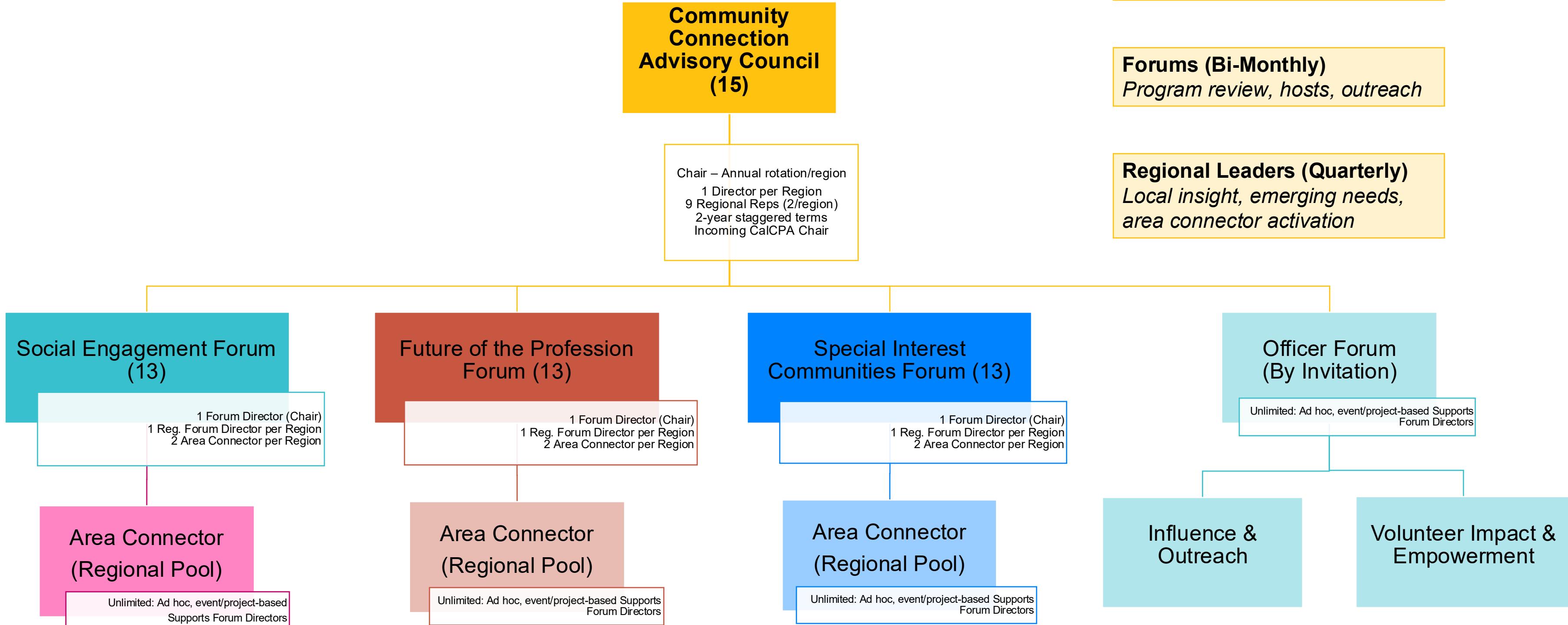
Connects Regions

Links Forums, Area Connectors, and regional leaders to strengthen statewide consistency.

Modern Interest-Based Volunteering

Advisory Councils (like state committees) Report Directly to the Board of Directors

CCAC (Quarterly)
Strategy, statewide priorities

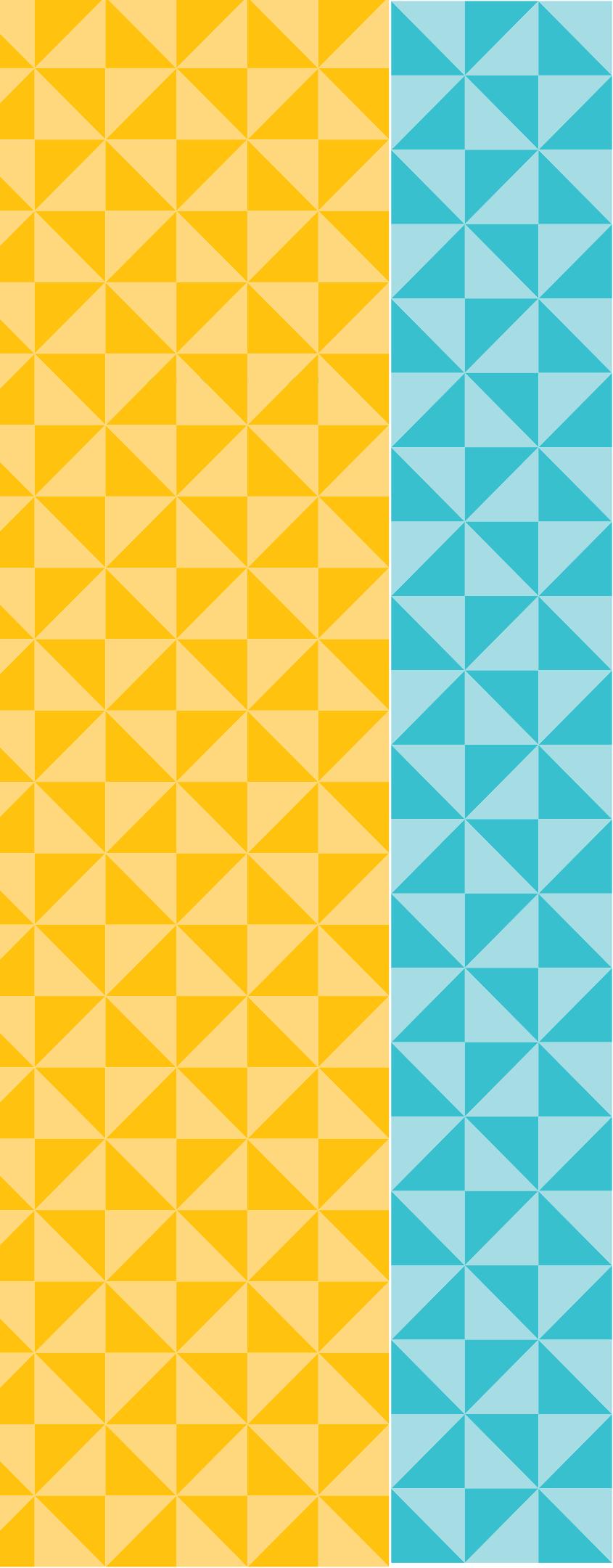


Community Connection Advisory Council Roles and Responsibilities

Community Connection Advisory Council Chair (1)	CCAC Regional Directors (4)	CCAC Regional Representatives (8)
<ul style="list-style-type: none">• Guides the CCAC's statewide focus and meeting flow• Ensures regional voices and grassroots experiences are fully represented• Partners with staff to set quarterly agendas grounded in data and engagement metrics• Helps connect the dots between statewide strategy and local opportunities• Serves as a visible bridge between CalCPA leadership and member communities	<ul style="list-style-type: none">• Represent the regional perspective in statewide conversations• Surface trends, barriers, and opportunities across their entire region• Review quarterly metrics and help align goals with regional realities• Support translation of CCAC guidance into meaningful community activation• Provide continuity and stability as the statewide model evolves• Participate in quarterly Regional Review sessions	<ul style="list-style-type: none">• Amplify grassroots perspectives from across their region• Bring forward insights from member activity, Forums, and hyper-local meetups• Identify emerging patterns or needs before they become statewide challenges• Contribute to a richer, more diverse understanding of member experience• Help inform Forum discussions and quarterly CCAC strategy reviews



Governance Recommendations



Voting Council Composition – Proposed

Current: Approx 90

Proposed: Approx 60-65

15 Board Members

10 Past Chairs

14 Chapter Ps/VPs (automatic)

20+ State Committee Chairs

1 Per 1000 Voting Members ~24
reps (nominations)

6 At-Large (nominations)

15+ Board Members

5 Past Chairs

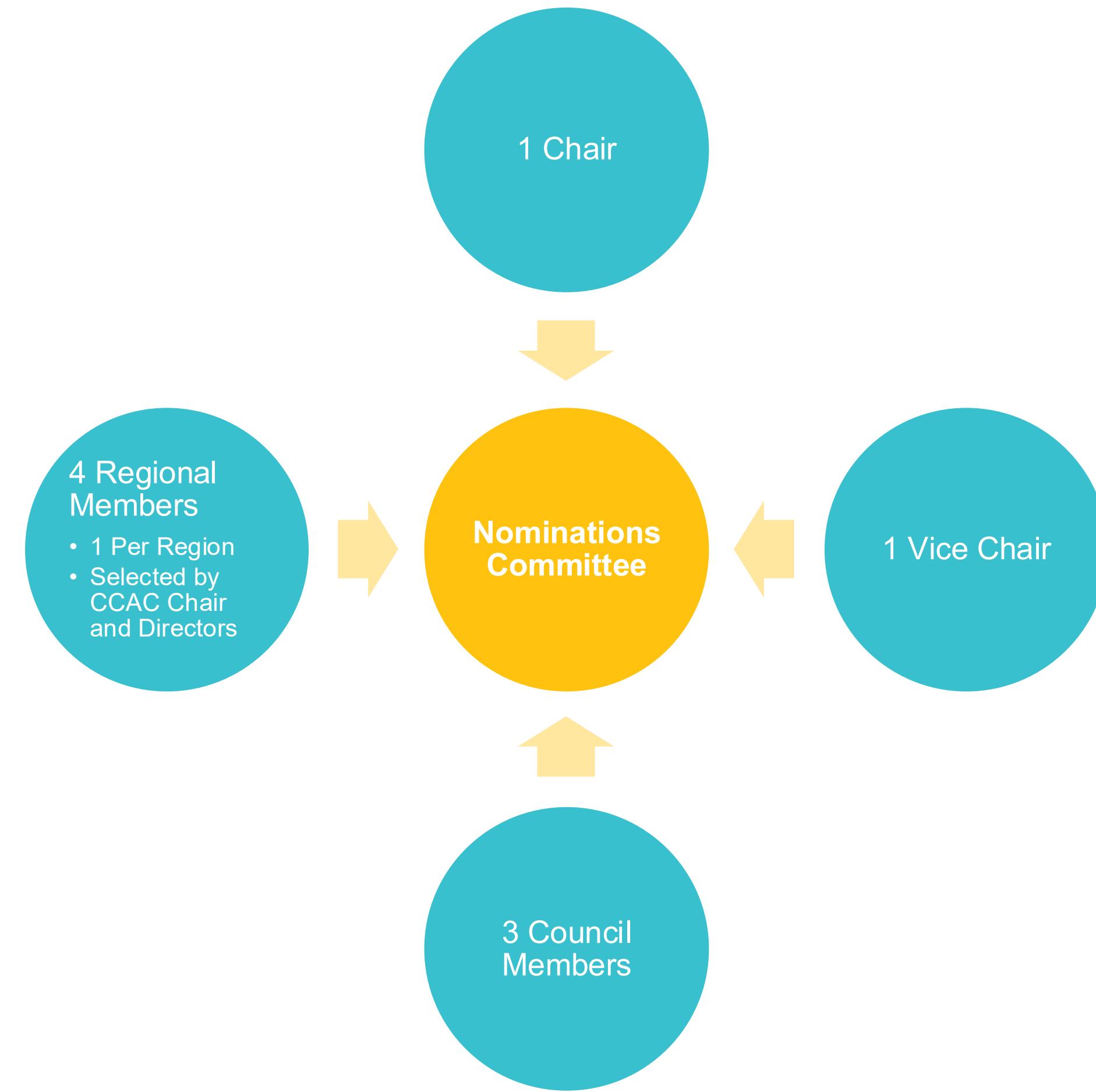
6 CCAC & 1 LIAC (automatic)

20+ State Committee Chairs

8 Regional Reps, 2/region
(nominations)

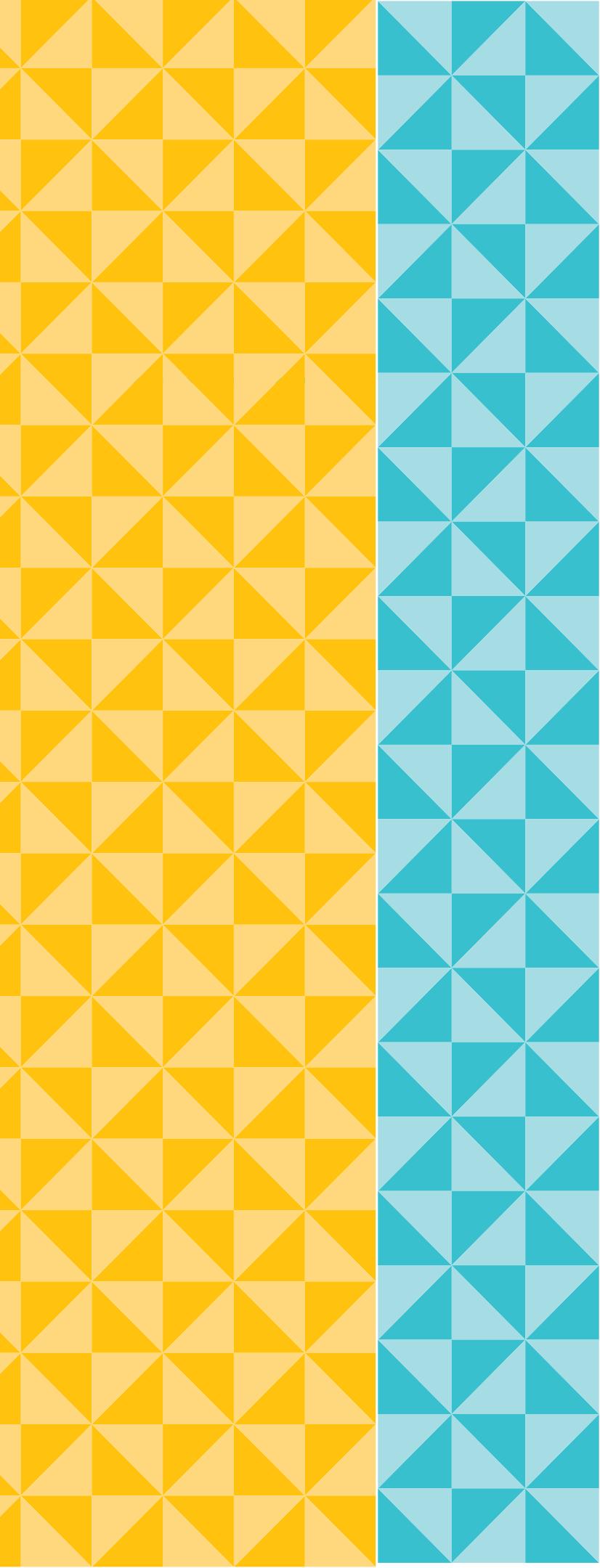
6 At-Large (nominations)

Nominations Committee Composition - Proposed





Community Forums



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.

Social Engagement Forum: Events, member meetups, social connection.

Officer Forum:

Invite-Only. Member growth, volunteer impact & recognition, firm outreach, community visibility.

Future of the Profession Forum: Students, early career, pipeline initiatives.

Special Interest Communities Forum: Interest-based groups and professional hubs.

Pilot Forums: CAS, Small Firms, CFO

How Forums Work

Meet virtually quarterly, in person annually

Bring local insights from each region

Advise on statewide programming and resources

Share best practices across regions

Carrying Local Voices Forward

Area Connectors to focus on the local flavor

Carry regional perspectives into statewide conversations

Elevate local voice into Forum work and CCAC understanding

How Will it all Work? (Video)

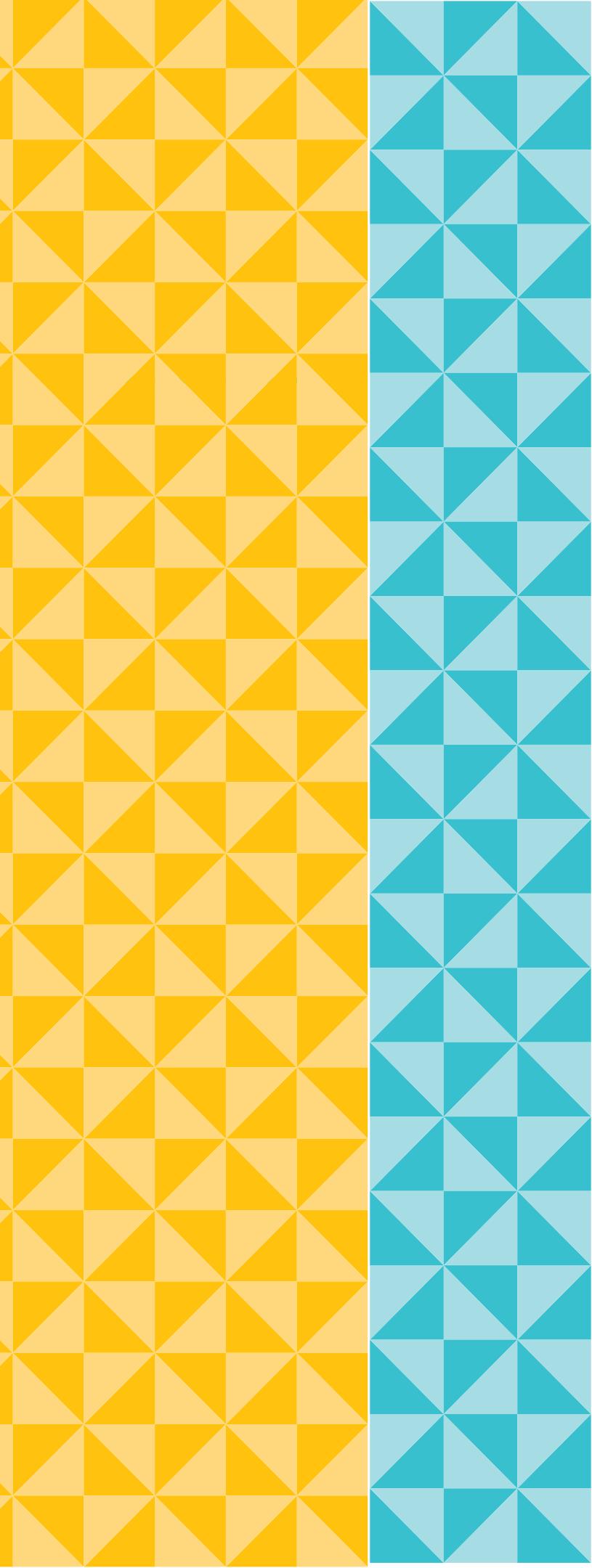


Community Forum Roles & Responsibilities

<p>Forum Director (Statewide Lead = 1)</p> <ul style="list-style-type: none">• Sets statewide direction for the Forum• Facilitates bi-monthly meetings and ensures follow-through• Reviews upcoming programs, assigns hosts, and forms outreach teams using the volunteer pool• Connects Forum work with CCAC insights and statewide priorities• Coordinates Regional Forum Directors and activates Area Connectors for regional nuance and local insight	<p>Regional Forum Directors (1 per Region = 4)</p> <ul style="list-style-type: none">• Bring regional needs and member input into Forum discussions• Participates in all bi-monthly Forum meetings• Help shape statewide ideas with regional context• Work closely with Area Connectors to gather local, on the ground insight• Support regional activation of Forum priorities and outreach efforts	<p>Area Connectors (2 per Region = 8)</p> <ul style="list-style-type: none">• Provide hyper local perspective to keep member experience rooted in community• Engaged as needed for specific topics, events, or Forum initiatives• Support targeted outreach and host recruitment for events and meetups• Help pressure test ideas so statewide plans reflect local needs• Help ensure statewide plans feel local and relevant across California• Flexible, ad hoc role with no standing meeting cadence
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Events



Calendar of Events (Work in Progress)

2025-26

17 ABCs

6 Active/Sports/Tournaments

1 Community Service

7 Conferences/Summit

8 Networking Socials

2 Sponsored Events

0 (no) Startup Communities

9 Student

13 Member Led Meet-Ups

2026-27

= 17 ABCs

= 6 Active/Sports/Tournaments

↑ 5 Community Service

= 7-8 Conferences/Summit

↓ 6 Networking Socials

↑ 10+ Sponsored Events

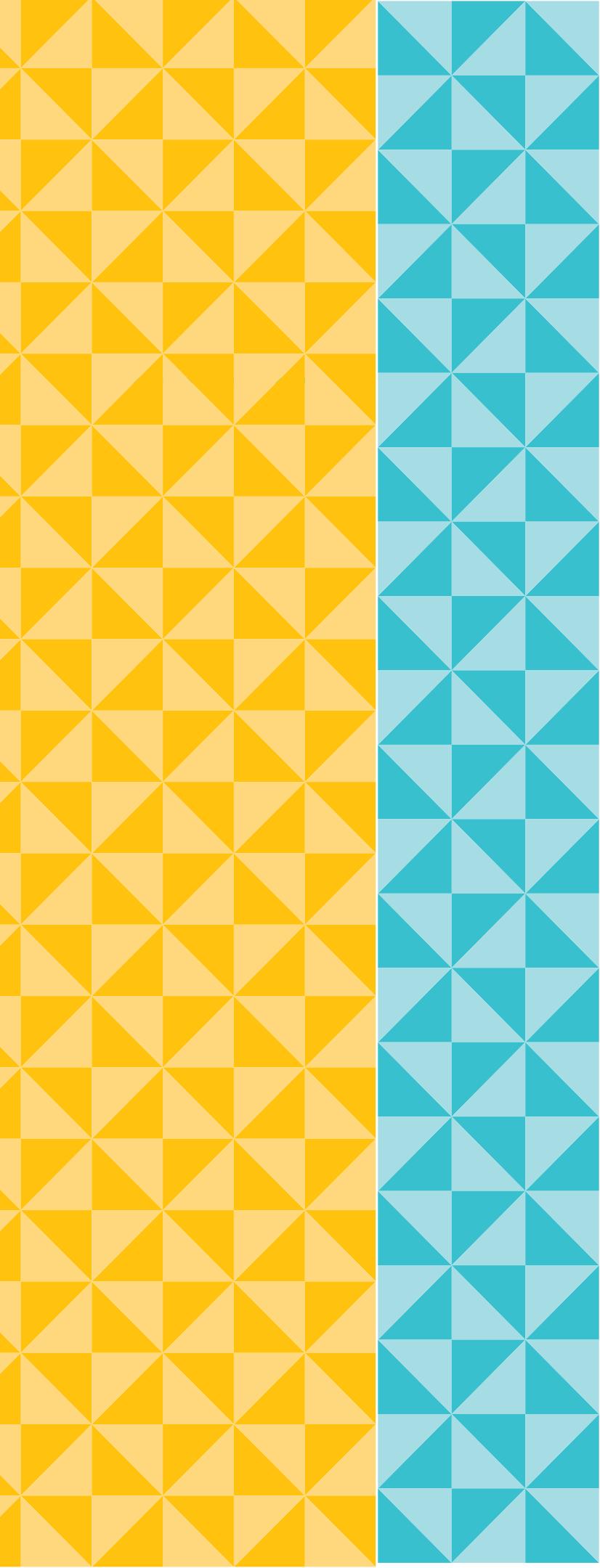
↑ 10+ Startup Events in New Communities

↑ 15 Student

↑ Unlimited Meet-Ups and More to Come!



Scholarships



Process

Legacy chapter fundraising events continuing to take place

Net proceeds go to same legacy chapter scholarship fund

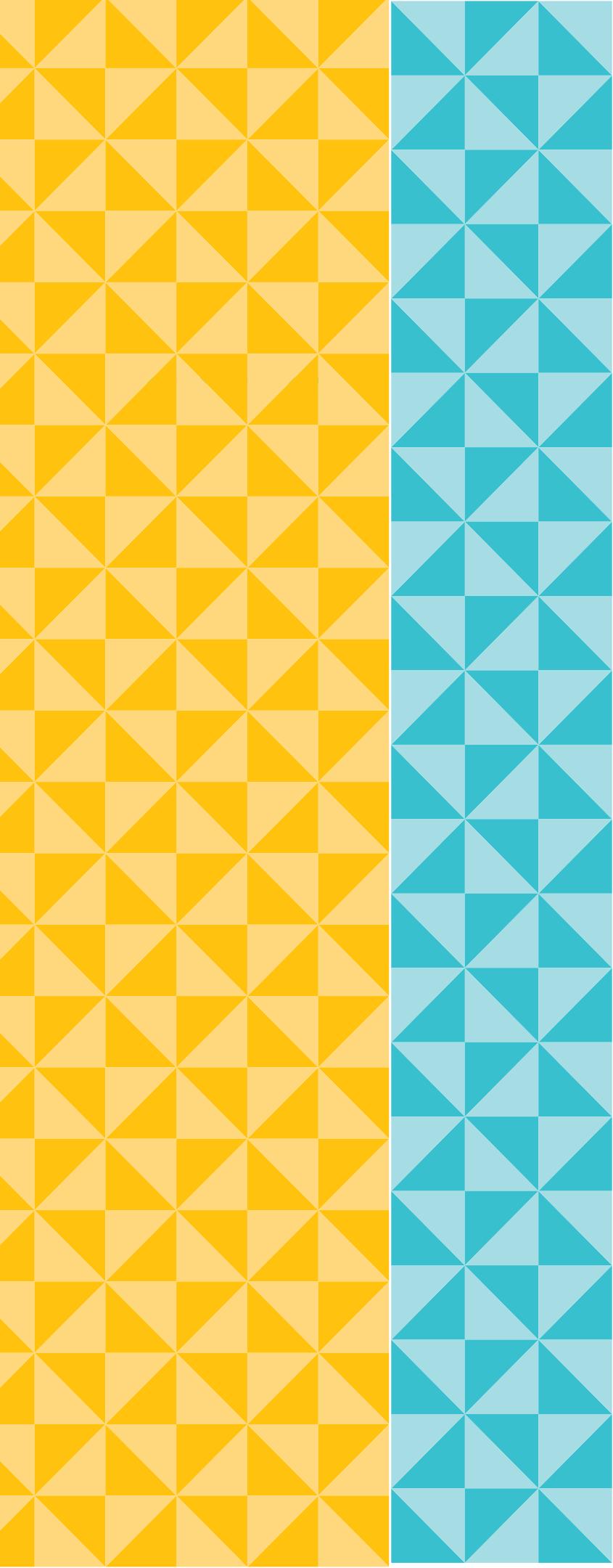
Scholarship distributions to schools and/or students from legacy chapter geographies will continue

Scholarship groups from legacy chapter geographies to review applications and identify distributions and amounts

Future: Task force to research, evaluate and identify modern and leading practices for an additional scholarship pathway



Governance Recommendations Overview



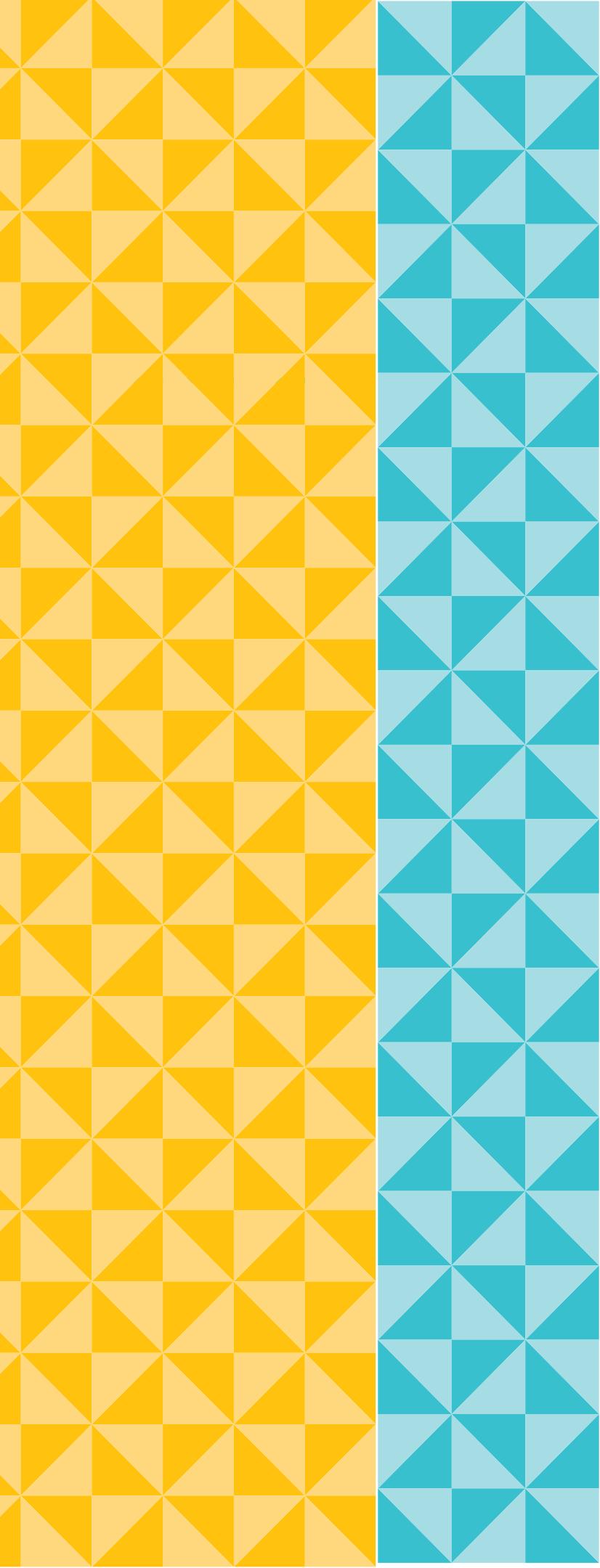
Bylaw Updates & Recommendations

Informed by association leading practices, research and external governance experts.

- Simplification and Modernization
- Advisory Councils
- Council Composition and Terms
- Board of Director Composition
- Regional Framework
- Nominations Committee Composition
- Education Foundation Dissolution Impacts
- State Committee Formation
- Policy and Procedure Manual



Timeline



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

