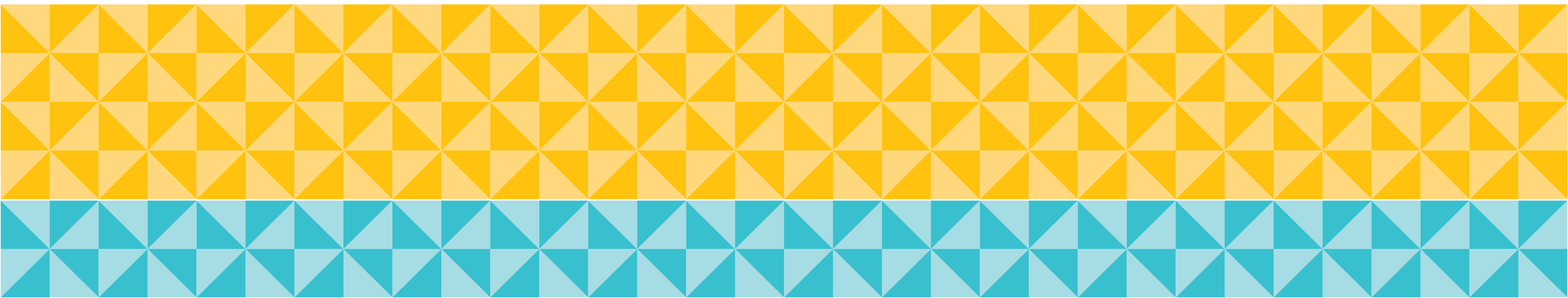




# Community Engagement Framework



# Regional Map Draft

## Northern Region

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

## Central Region

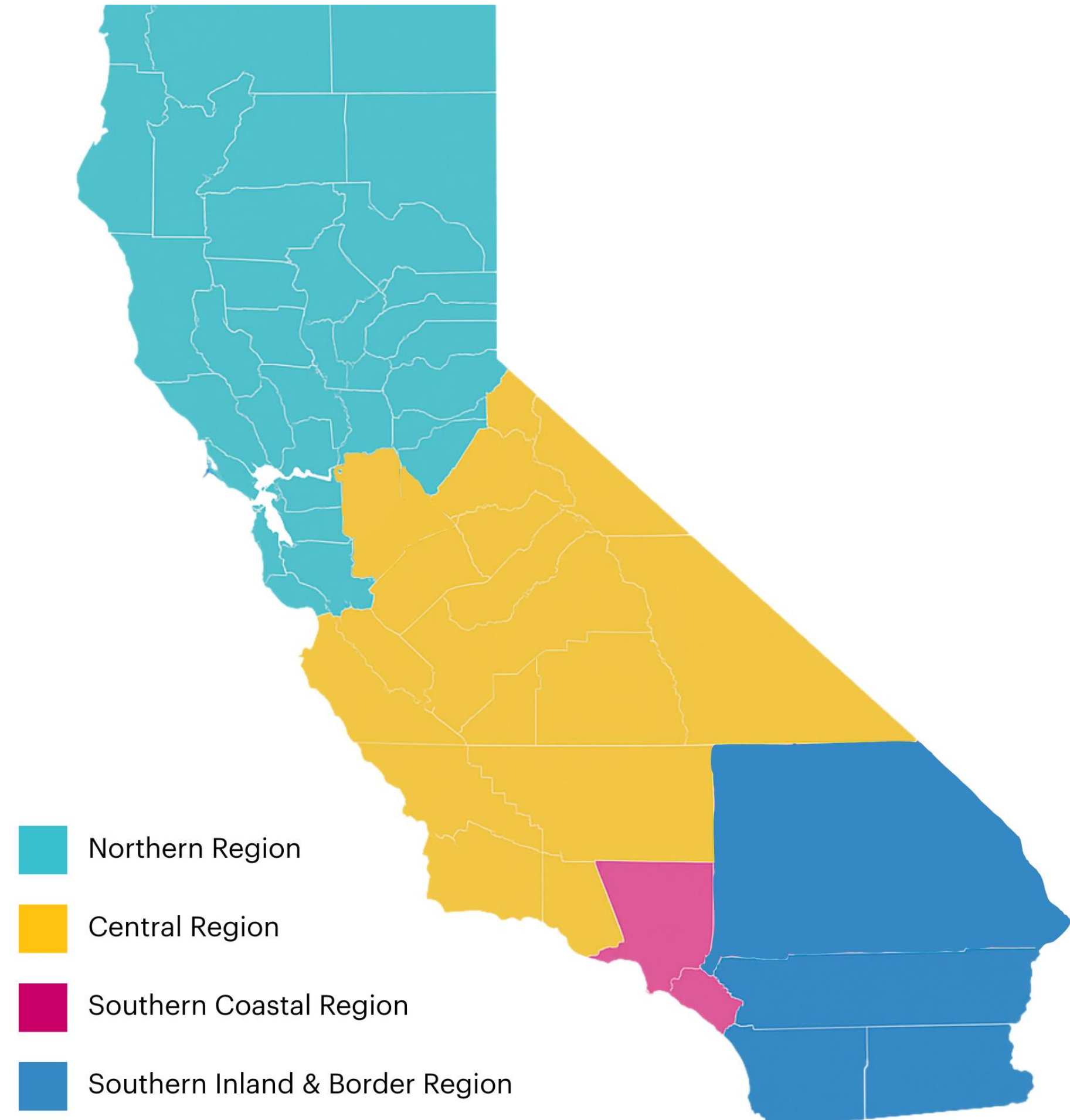
- Fresno, Bakersfield, Central Coast, Channel Counties, San Joaquin

## Southern Coastal

- Los Angeles, Orange County

## Southern Inland & Border

- Inland Empire, San Diego

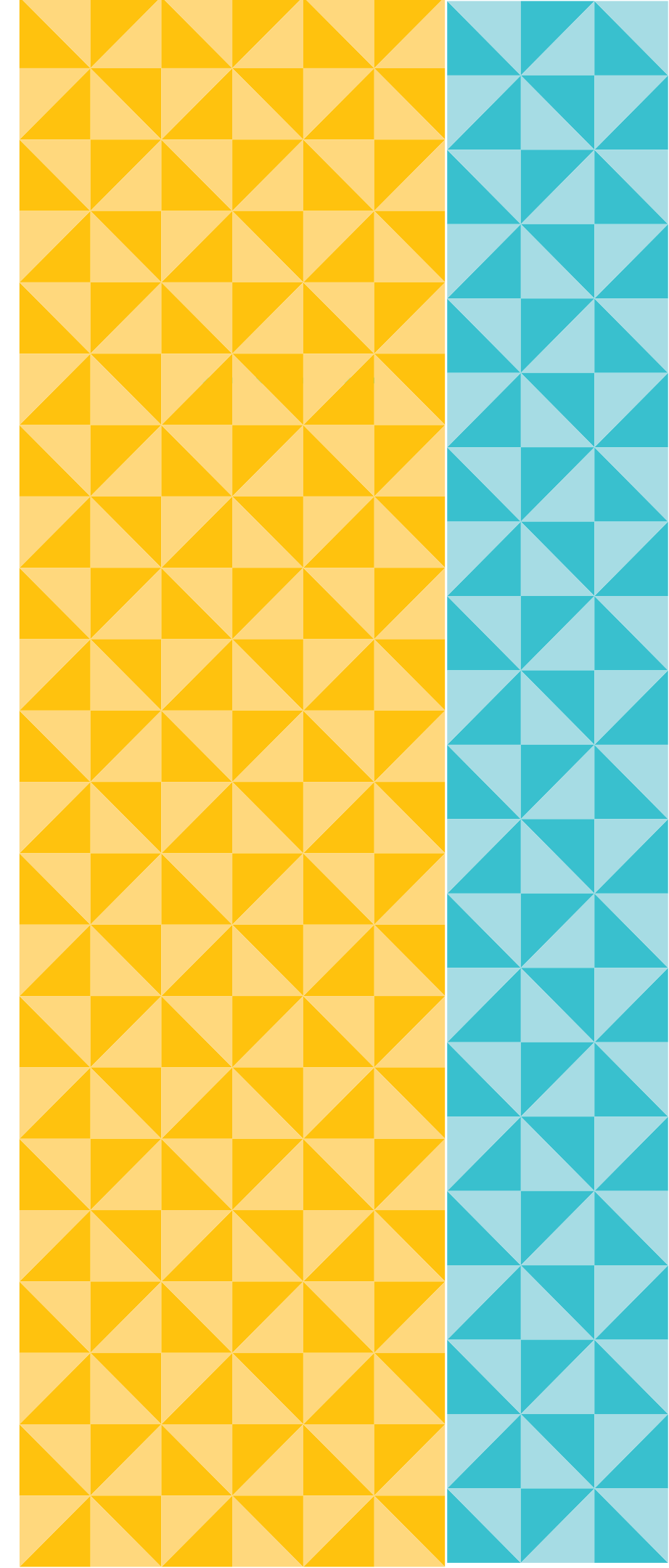


# Regional Member Data Draft

Region	City Centers	% of Members	Member Hotspot Areas
<b>Northern</b>	Sacramento, San Francisco, San Jose, Oakland, Walnut Creek	25-26%	Roseville, Chico, Santa Rosa, Napa, Sonoma, Livermore, Davis
<b>Central</b>	Fresno, Bakersfield, San Luis Obispo, Santa Barbara, Monterey, Stockton, Modesto	24-26%	Ventura, Ojai, Thousand Oaks, Visalia, Paso Robles, Salinas
<b>Southern Coastal</b>	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
<b>Southern Inland &amp; Border</b>	Riverside, San Bernardino, San Diego	23-24%	Temecula, Vista, Palm Desert/Springs, Chula Vista, Redlands, Chino Hills



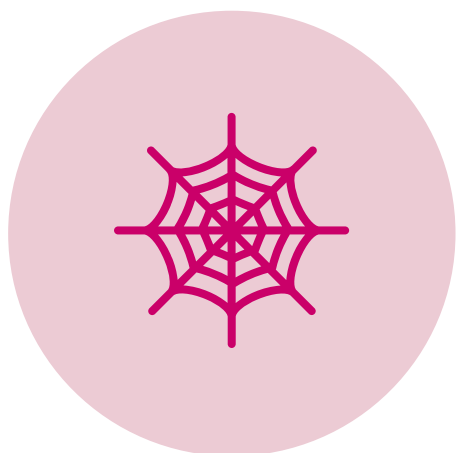
# Community Connection Advisory Council



# Purpose & Function



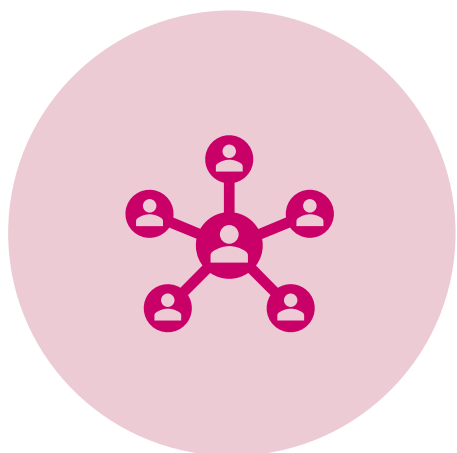
**Statewide Bridge**  
Connecting grassroots local communities and CalCPA's strategic leadership.



**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.

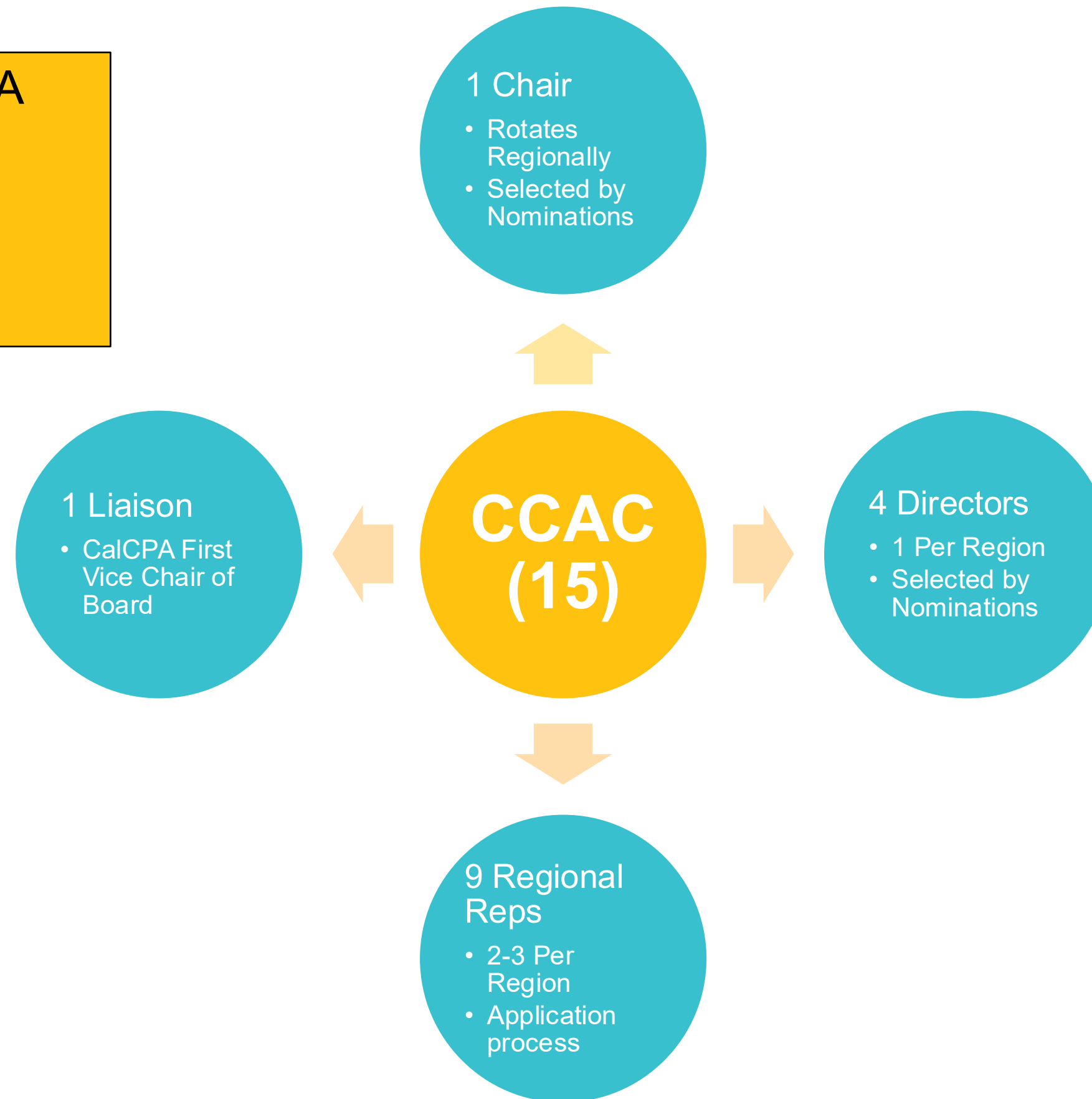


**Conduit for Collaboration**  
Facilitates two-way communication between members and leaders to strengthen statewide unity.

# CCAC Composition - Proposed

Automatically on CalCPA Council (6):

- 1 Chair
- 4 Directors
- 1 Regional Rep.



# 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.

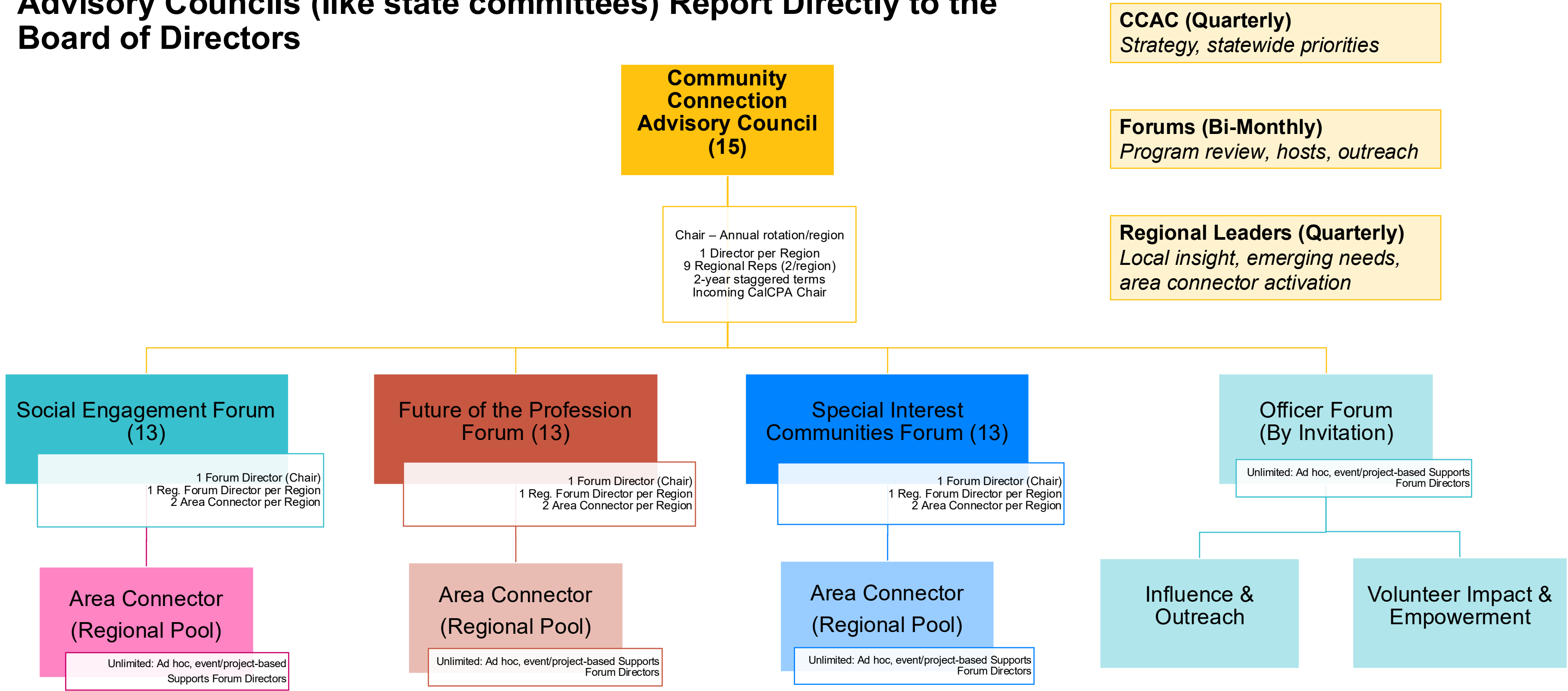


## Connects Regions

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





# Community Connection Advisory Council

## Roles and Responsibilities

Community Connection Advisory Council Chair (1)

- 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

CCAC Regional Directors (4)

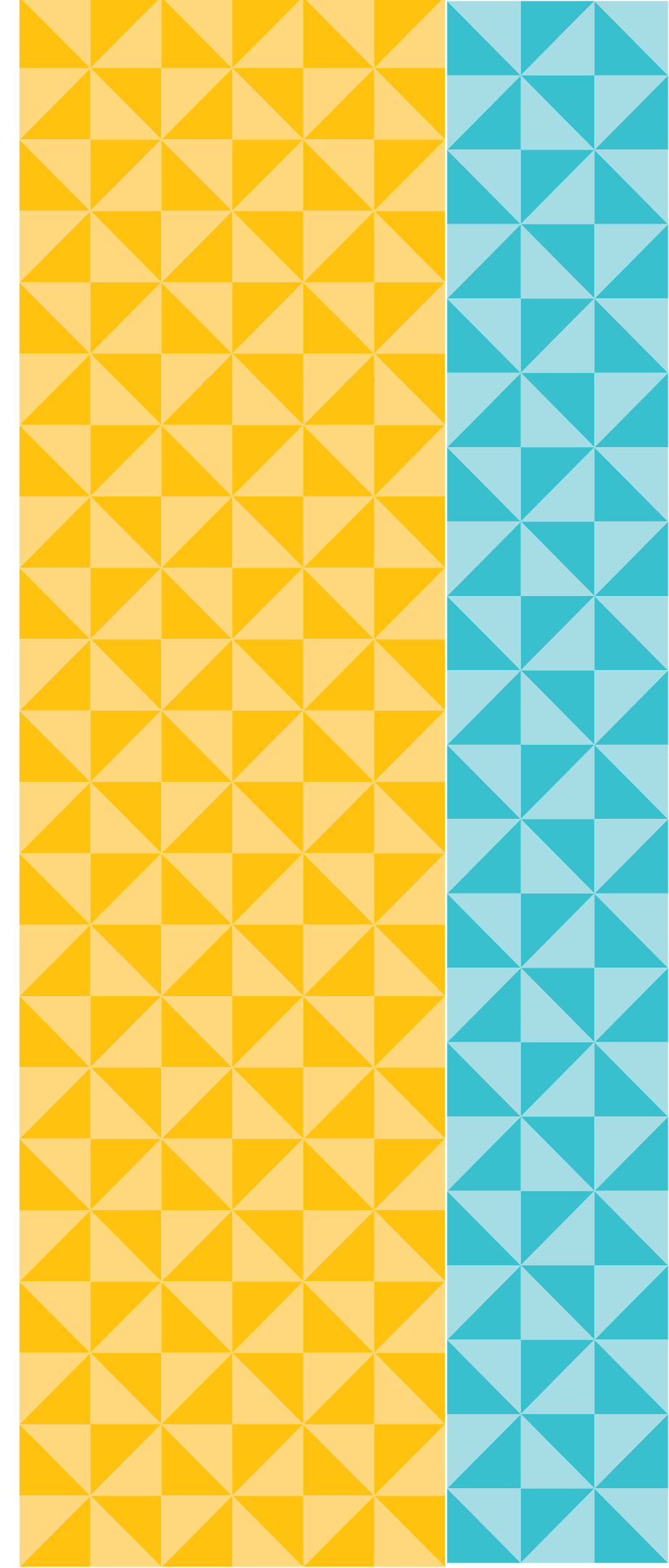
- Represent the regional perspective in statewide conversations
- Surface trends, barriers, and opportunities across their entire region
- Review quarterly metrics and help align goals with regional realities
- Support translation of CCAC guidance into meaningful community activation
- Provide continuity and stability as the statewide model evolves
- Participate in quarterly Regional Review sessions

CCAC Regional Representatives (8)

- 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

15+ Board Members

10 Past Chairs

5 Past Chairs

14 Chapter Ps/VPs (automatic)

6 CCAC & 1 LIAC (automatic)

20+ State Committee Chairs

20+ State Committee Chairs

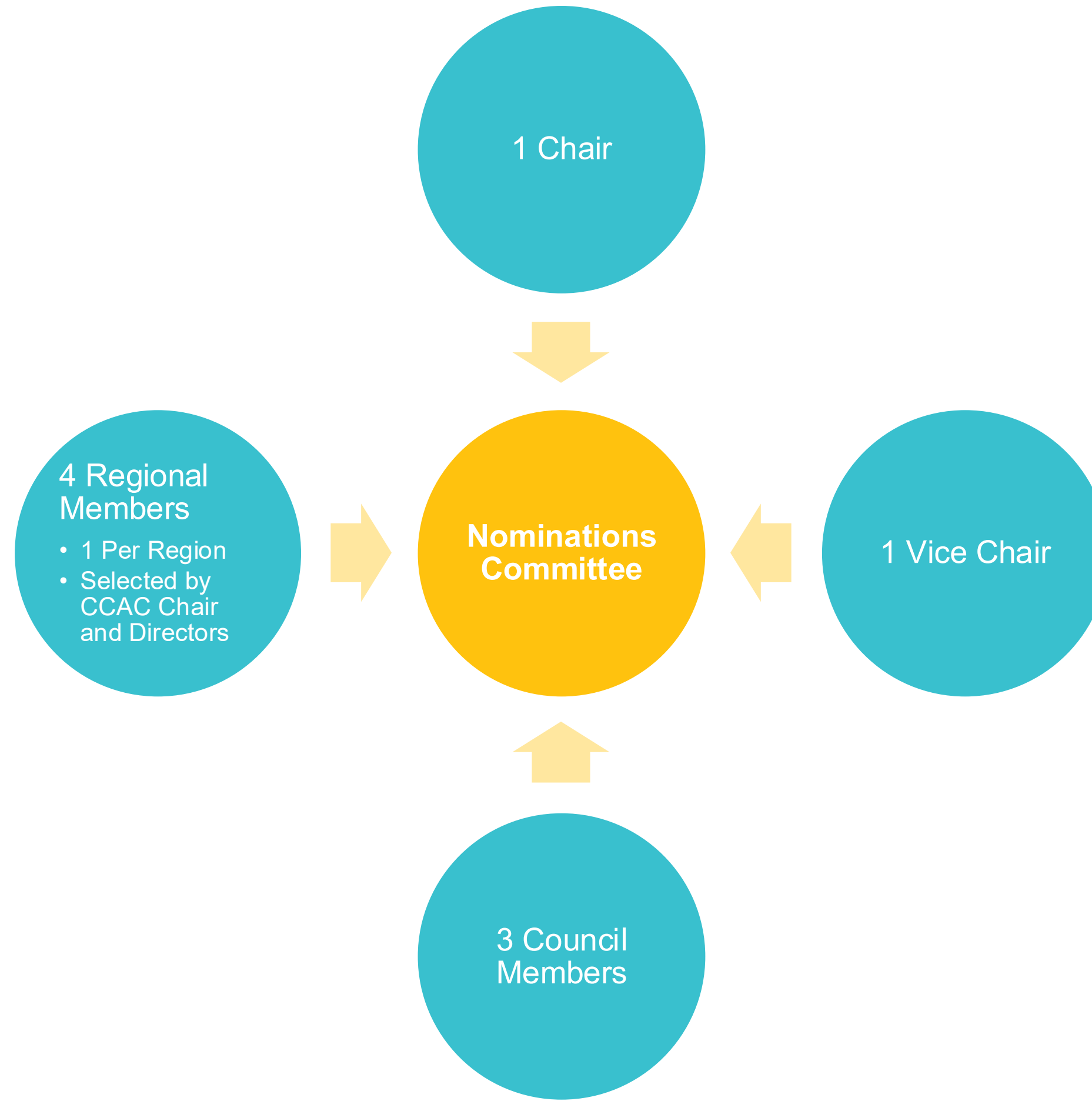
1 Per 1000 Voting Members ~24  
reps (nominations)

8 Regional Reps, 2/region  
(nominations)

6 At-Large (nominations)

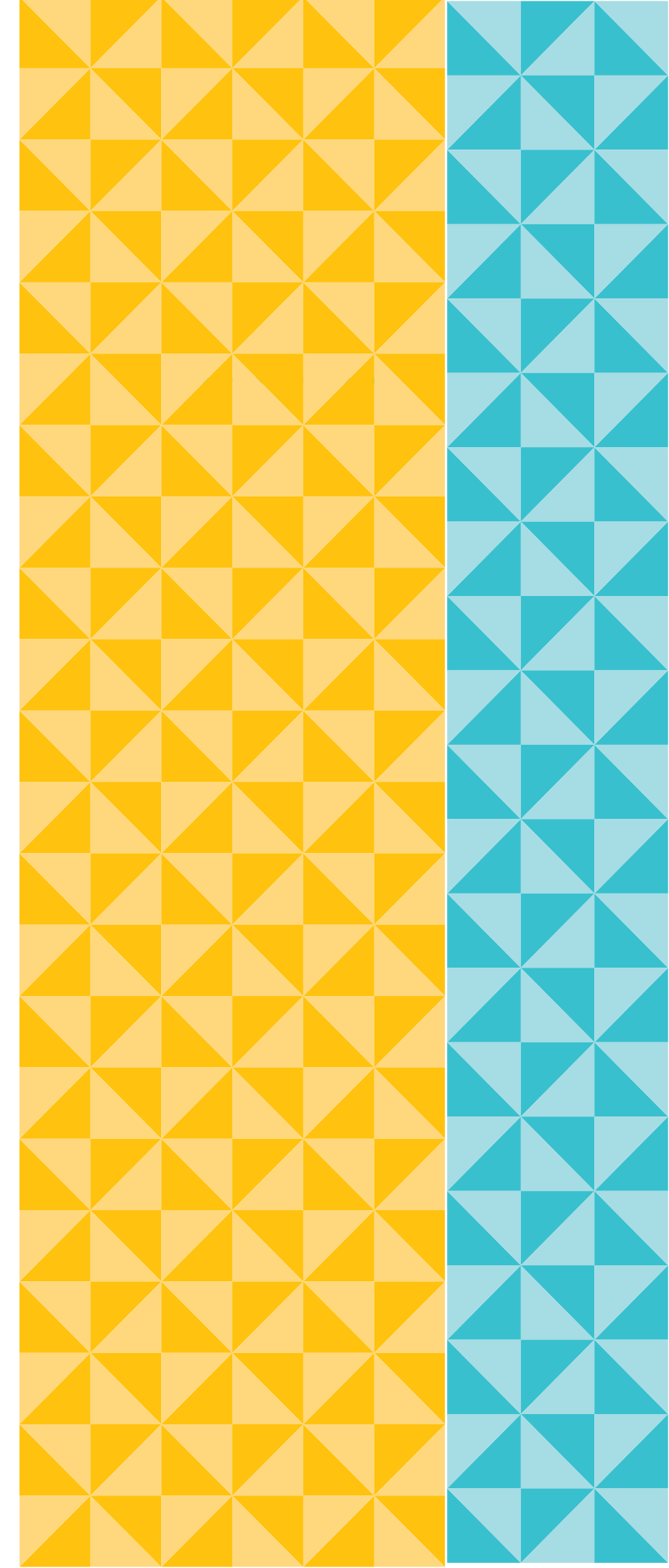
6 At-Large (nominations)

# 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

## Forum Director (Statewide Lead = 1)

- 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

## Regional Forum Directors (1 per Region = 4)

- 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

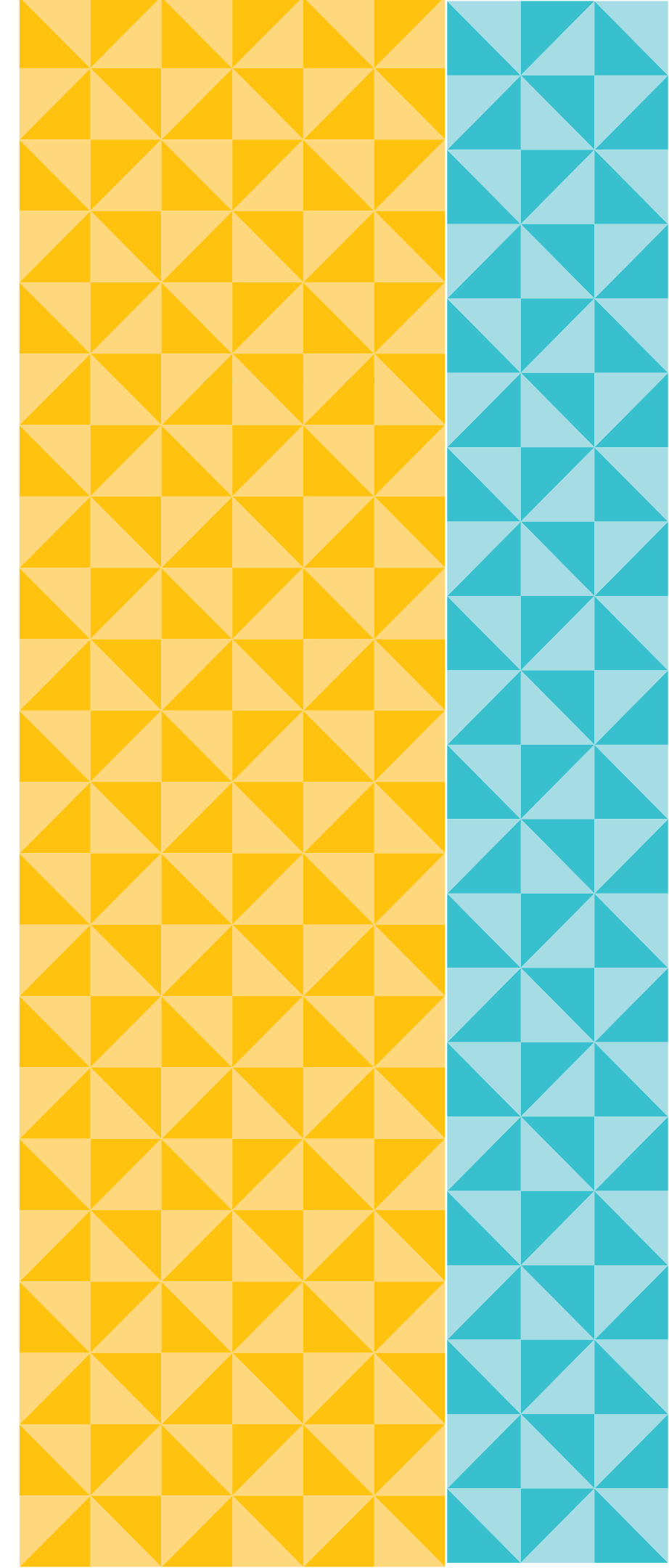
## Area Connectors (2 per Region = 8)

- 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





# Events



# Calendar of Events (Work in Progress)

## 2025-26

## 2026-27

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

= 17 ABCs

= 6 Active/Sports/Tournaments

↑ 5 Community Service

= 7-8 Conferences/Summit

↓ 6 Networking Socials

↑ 10+ Sponsored Events

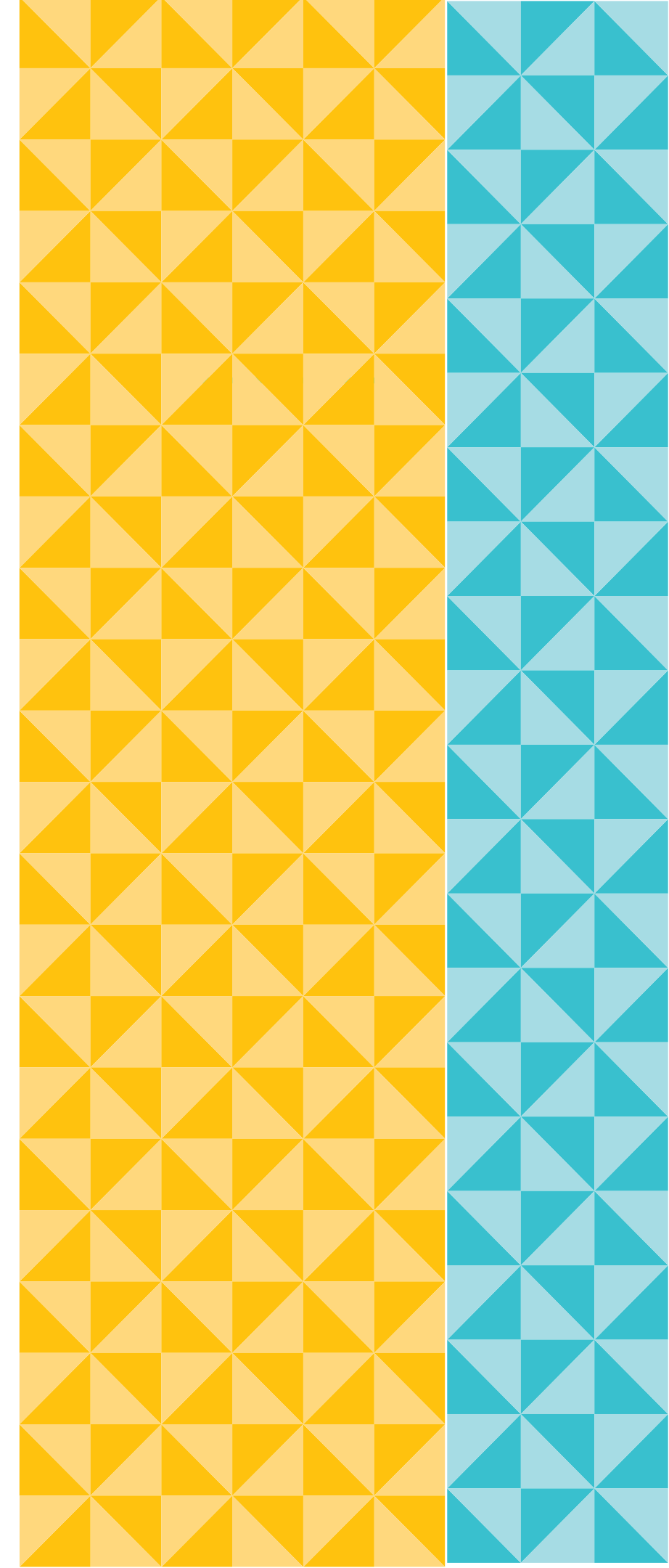
↑ 10+ Startup Events in New Communities

↑ 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

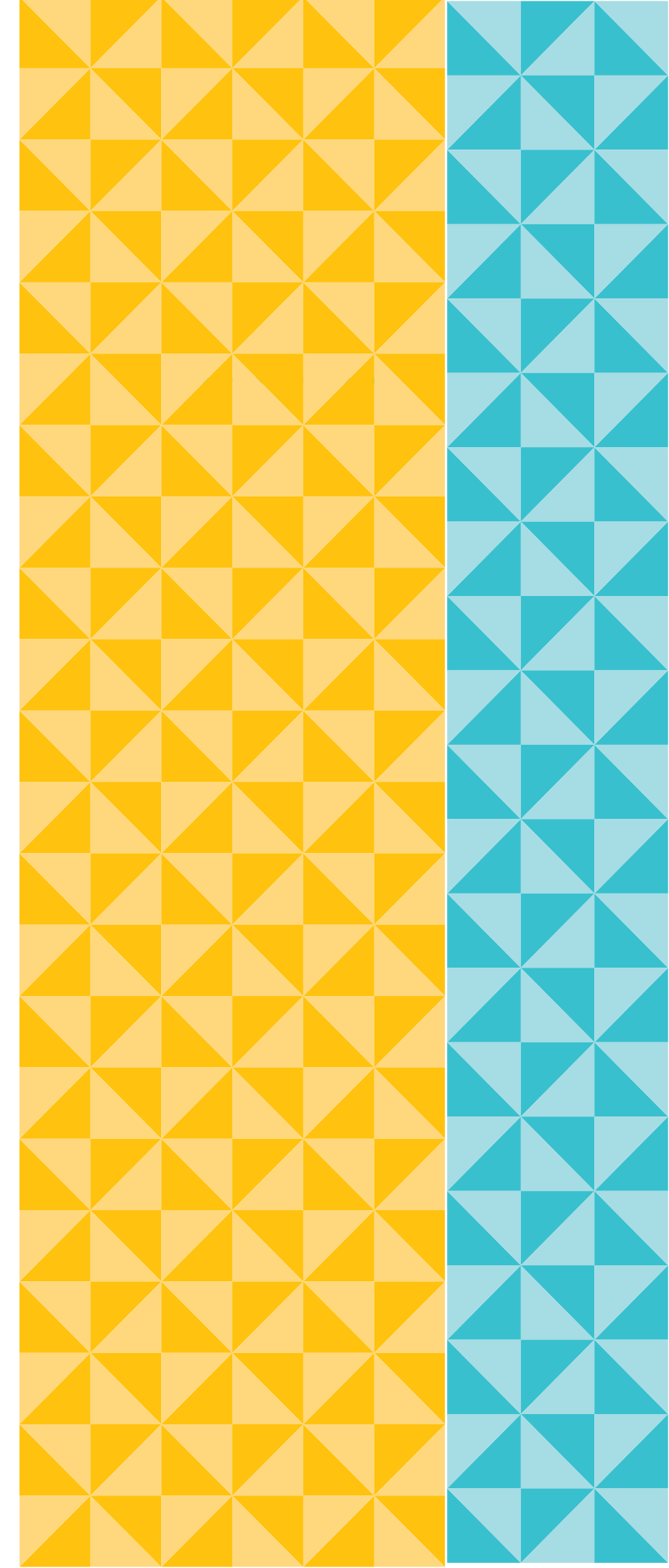
Scholarship distributions to schools and/or students from legacy chapter geographies will continue

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**



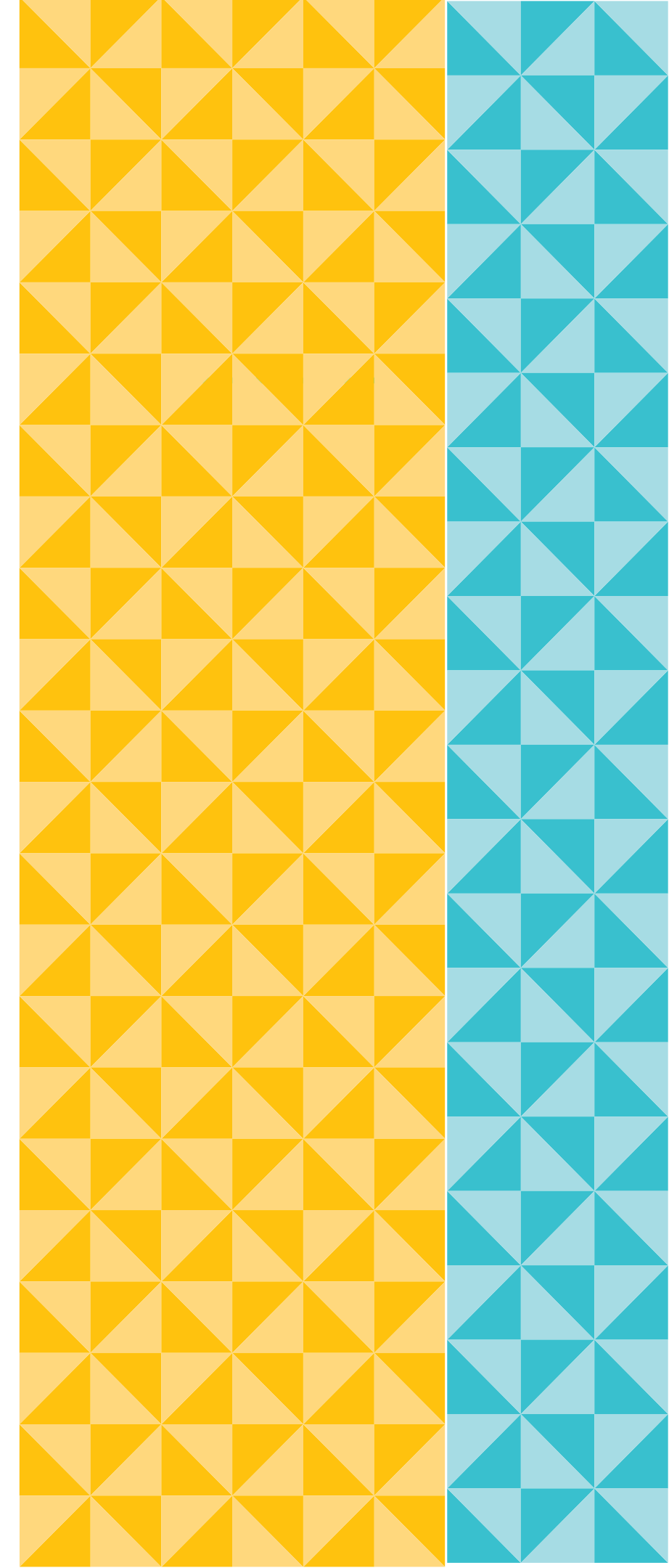
# Bylaw Updates & Recommendations

*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	✓	✓