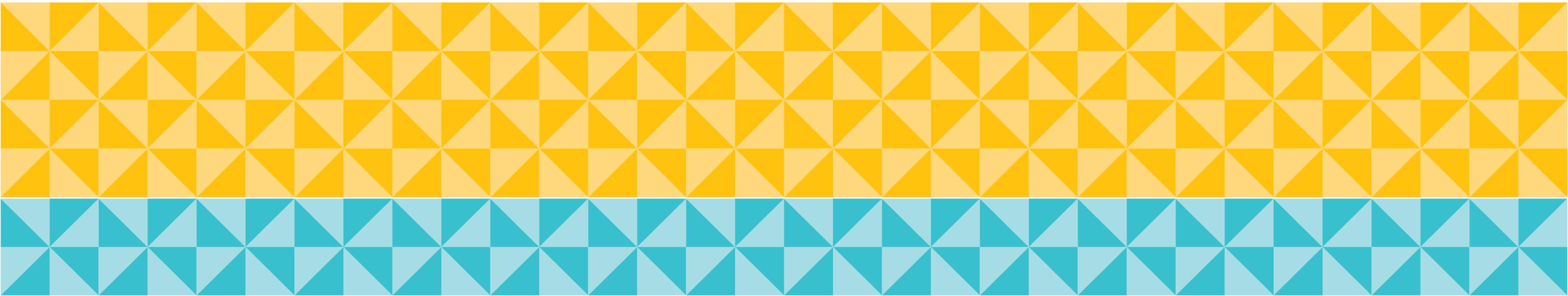




Community Engagement Framework



Regional Map Draft

Northern Region

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

Central Region

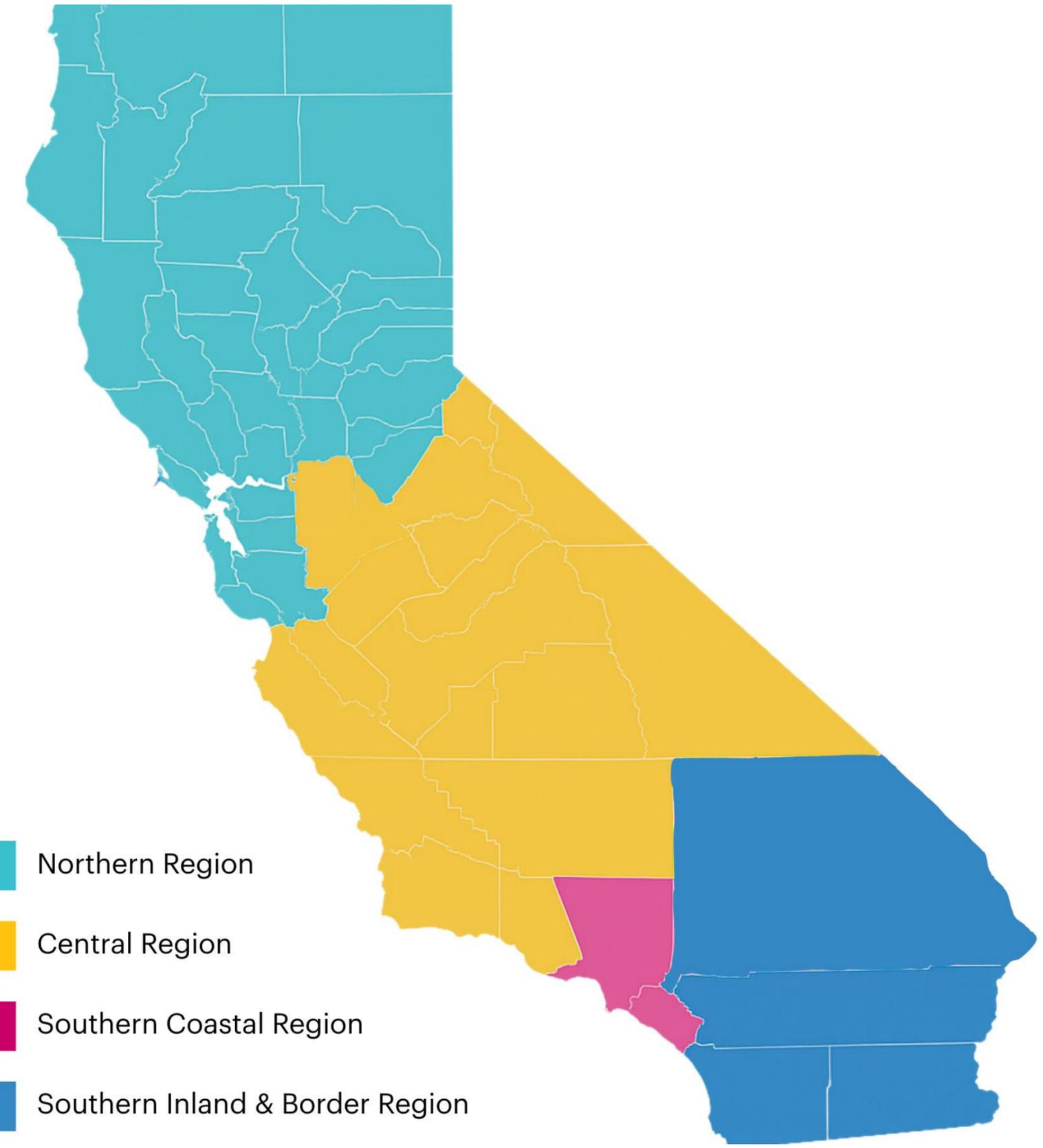
- Fresno, Bakersfield, Central Coast, Channel Counties, San Joaquin

Southern Coastal

- Los Angeles, Orange County

Southern Inland & Border

- Inland Empire, San Diego

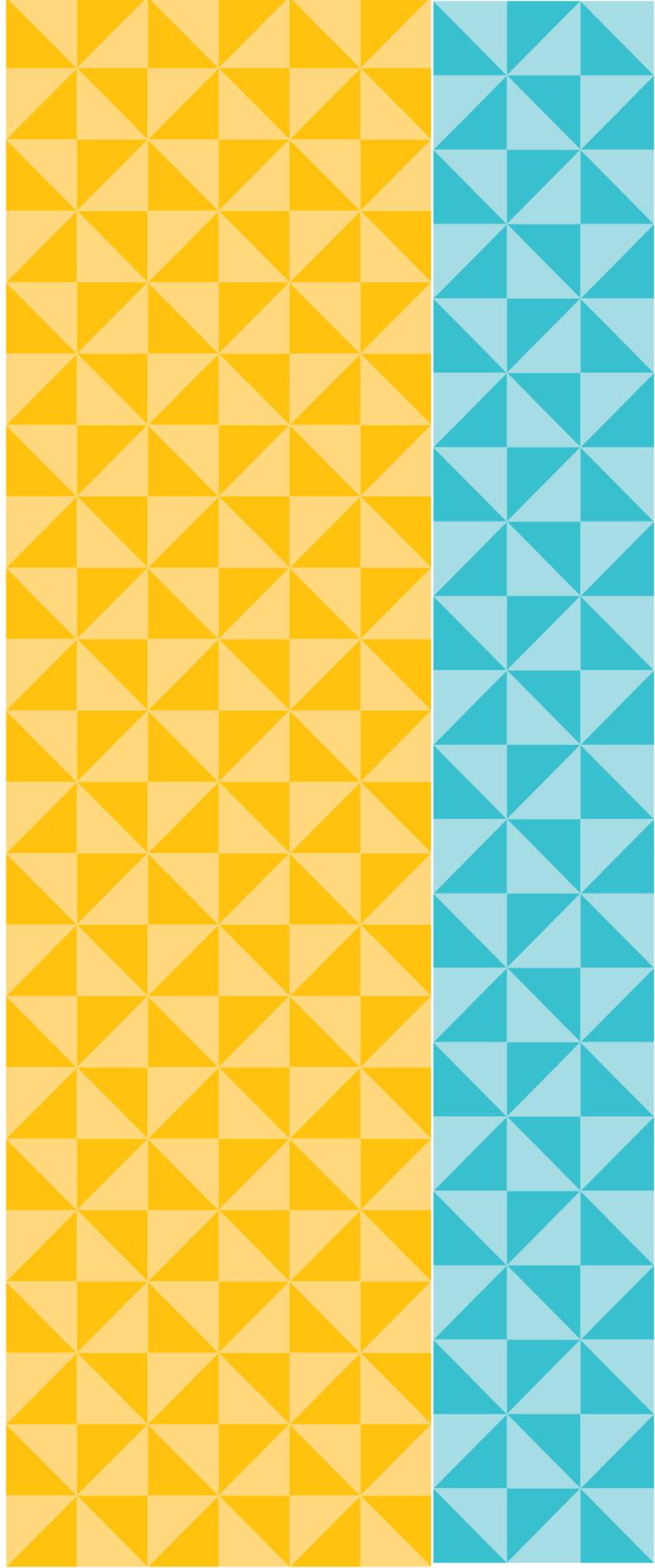


Regional Member Data Draft

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



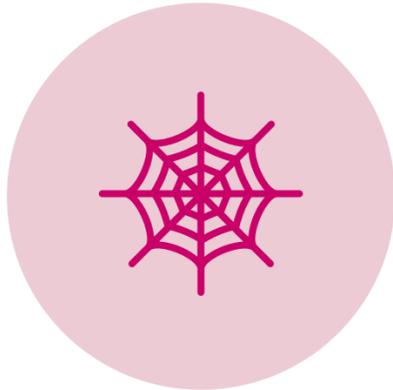
Community Connection Advisory Council



Purpose & Function



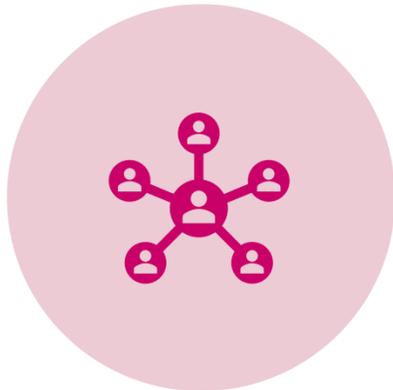
Statewide Bridge
Connecting grassroots local communities and CalCPA's strategic leadership.



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.

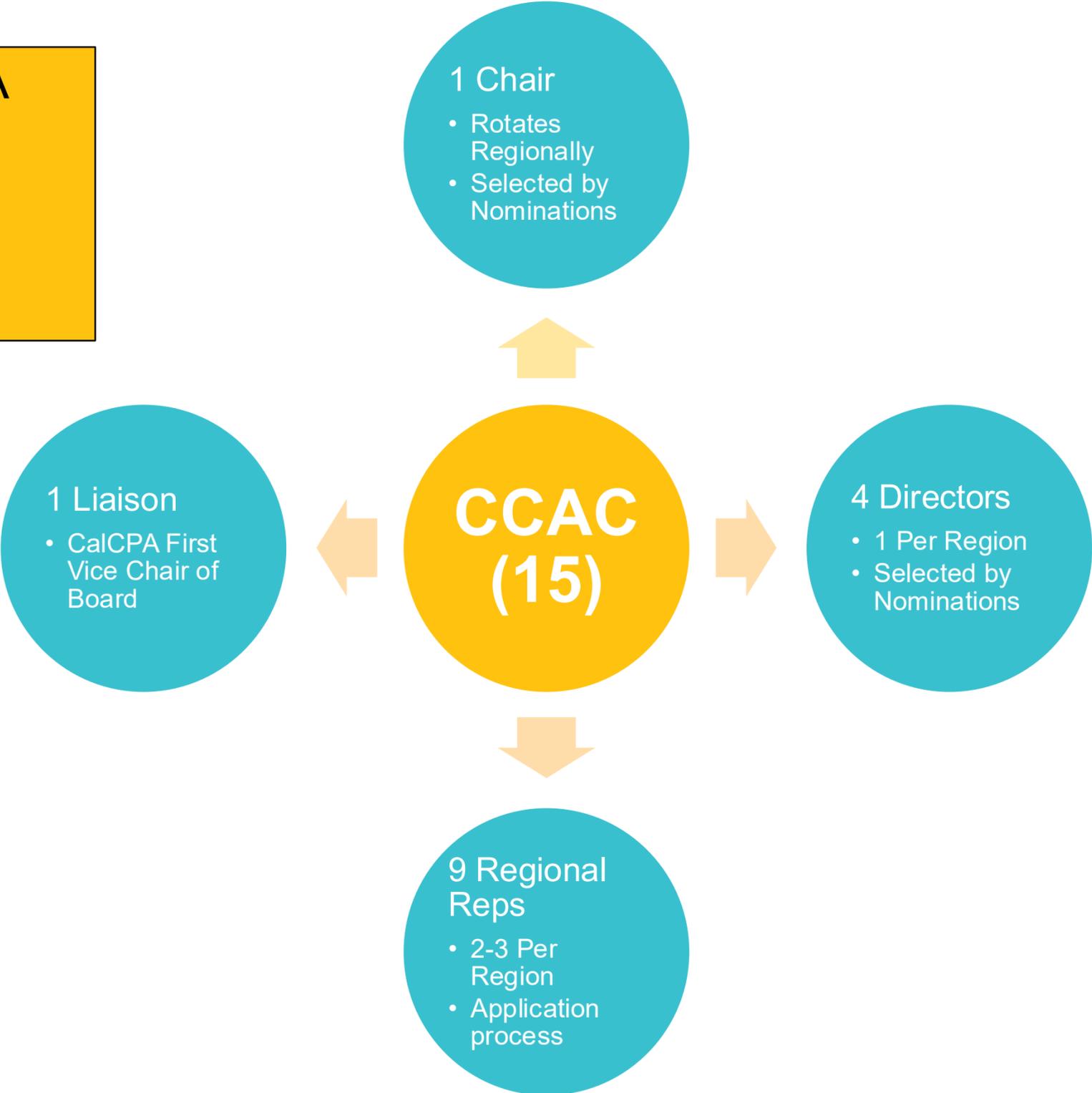


Conduit for Collaboration
Facilitates two-way communication between members and leaders to strengthen statewide unity.

CCAC Composition - Proposed

Automatically on CalCPA Council (6):

- 1 Chair
- 4 Directors
- 1 Regional Rep.

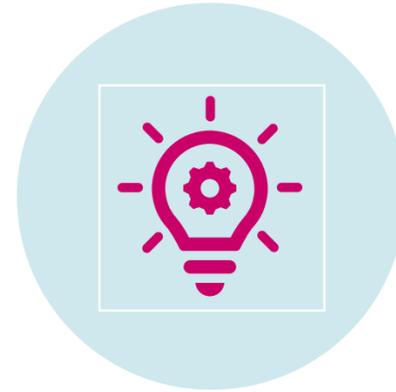


How the CCAC Will Work



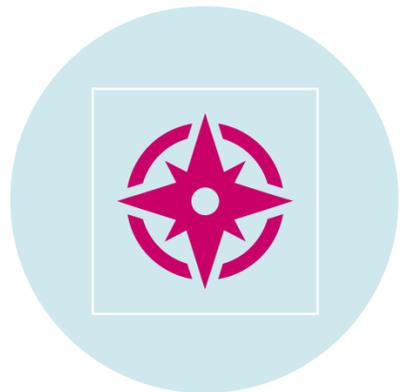
Meets Quarterly

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



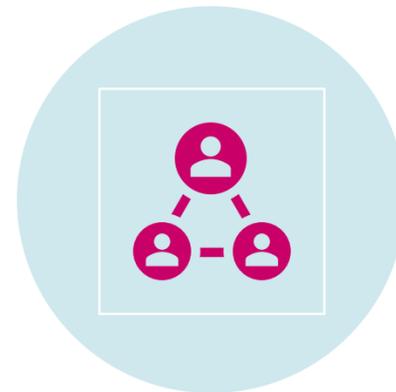
Shares Insights

Elevates local and regional perspectives that help guide engagement priorities.



Guides Priorities

Identifies emerging needs and opportunities based on statewide community activity.

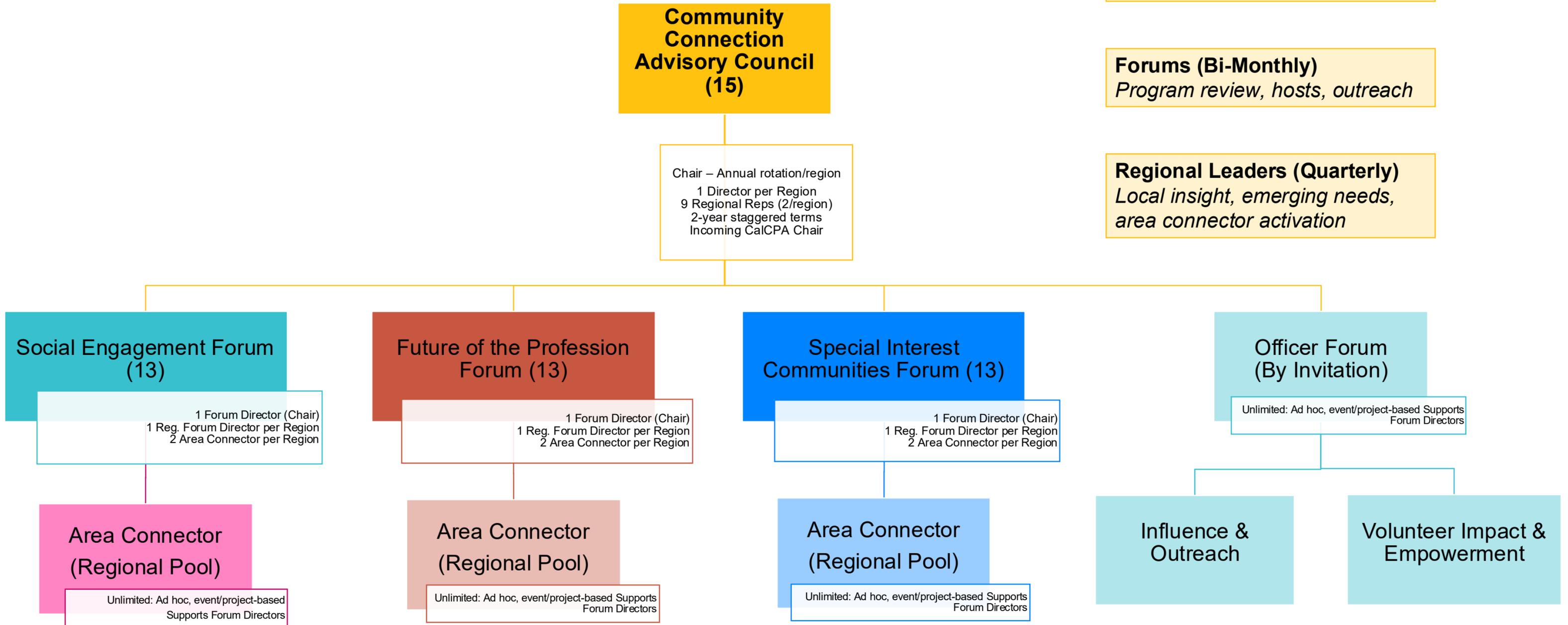


Connects Regions

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)

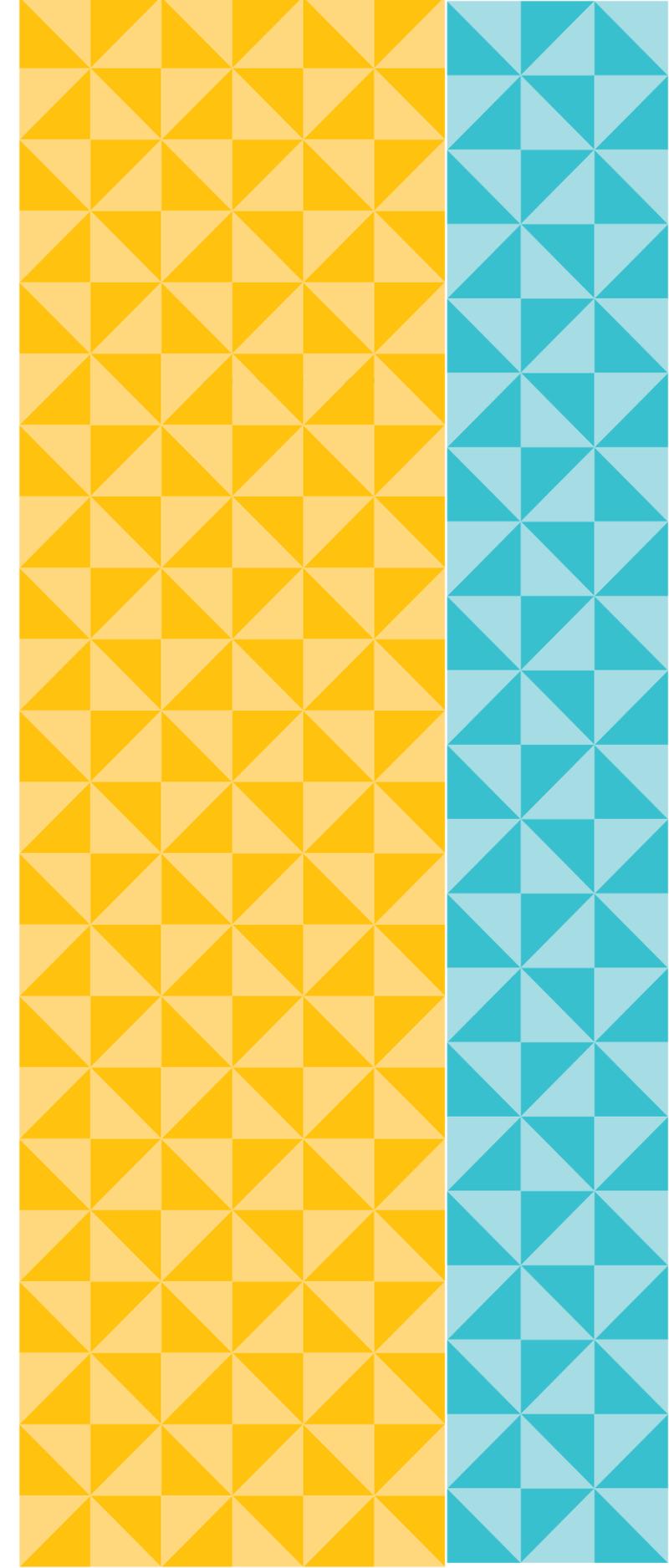
- Represent the regional perspective in statewide conversations
- Surface trends, barriers, and opportunities across their entire region
- Review quarterly metrics and help align goals with regional realities
- Support translation of CCAC guidance into meaningful community activation
- Provide continuity 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 95

Proposed: Approx 60-65

15 Board Members

15+ Board Members

10 Past Chairs

5 Past Chairs

28 Chapter Ps/VPs (automatic)

6 CAC & 1 LIAC (automatic)

~20 State Committee Chairs

~20 State Committee Chairs

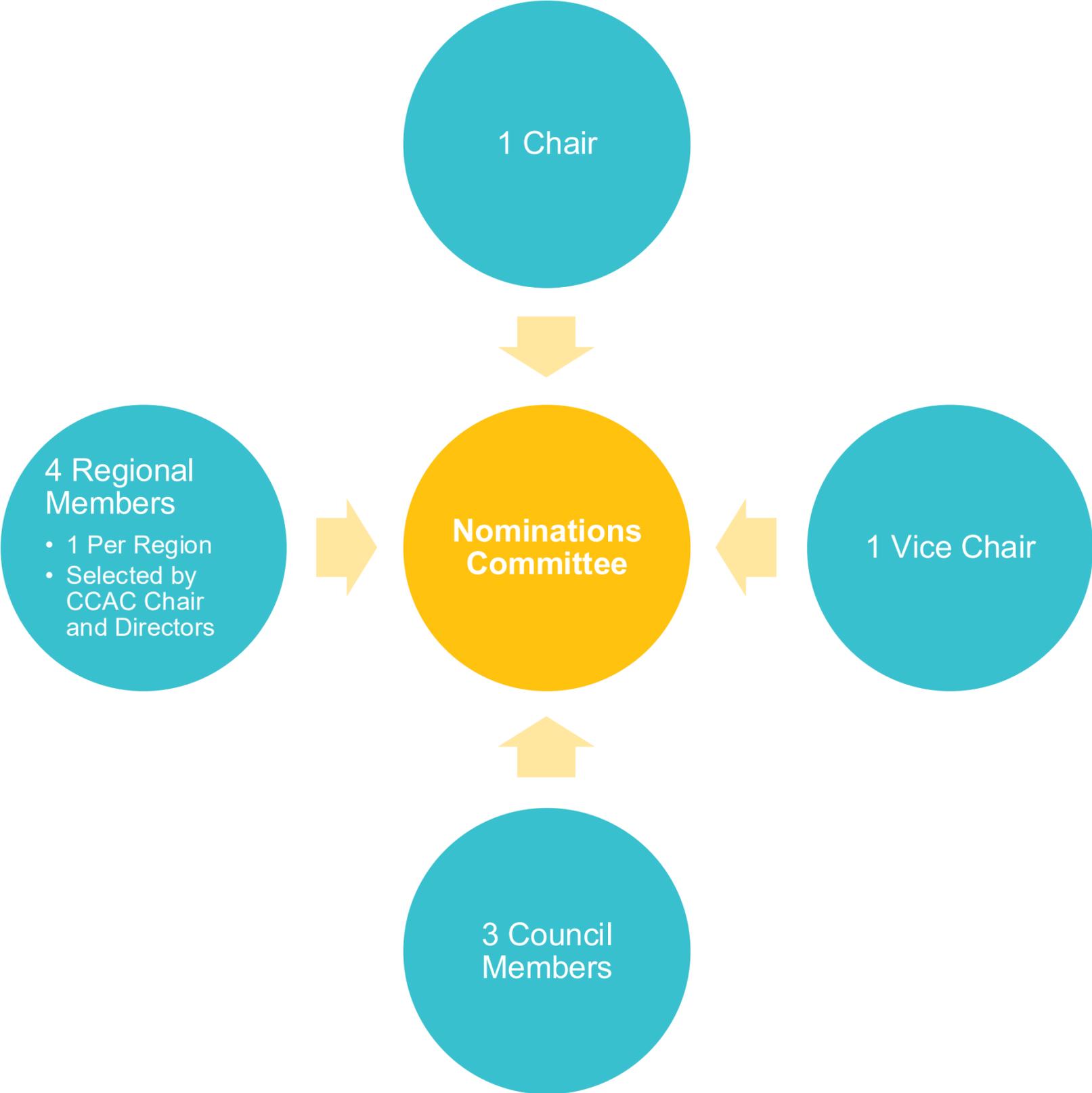
1 Per 1000 Voting Members ~24
reps (nominations)

8 Regional Reps, 2/region
(nominations)

6 At-Large (nominations)

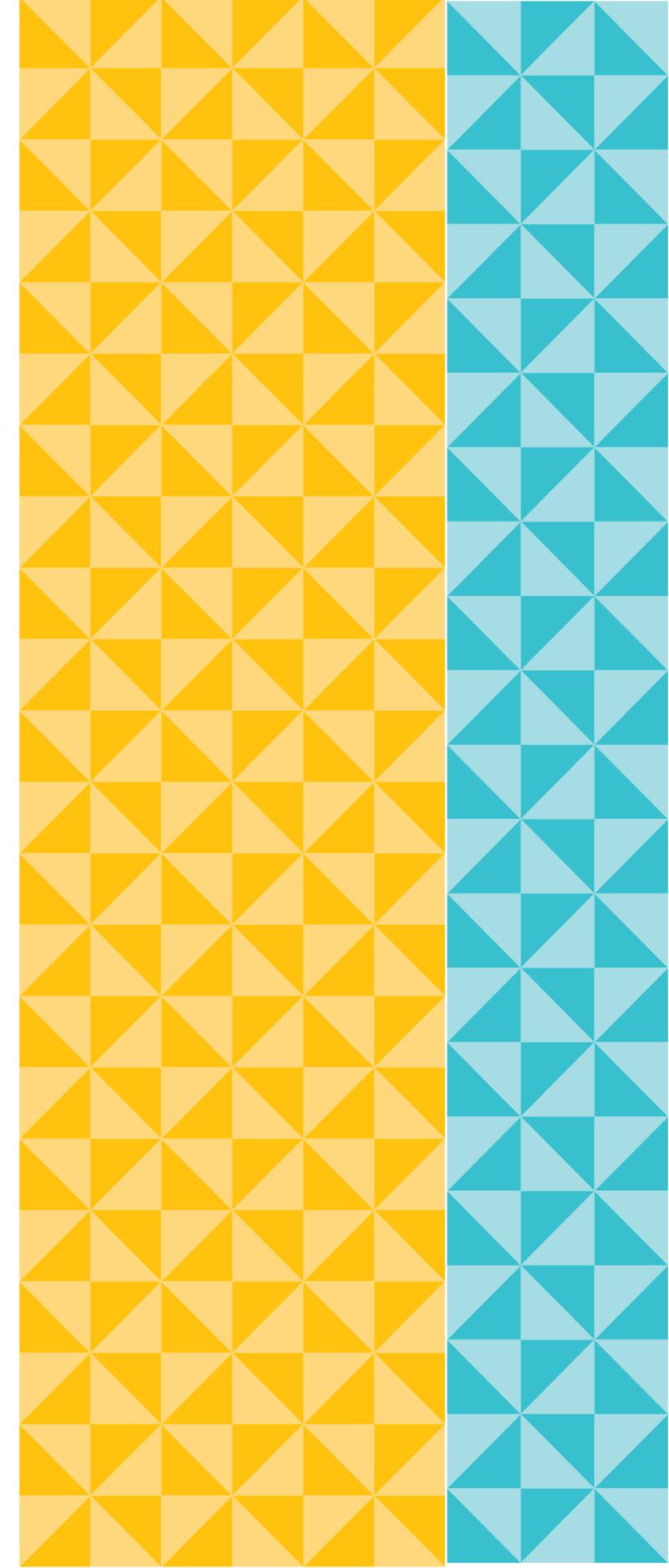
6 At-Large (nominations)

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)

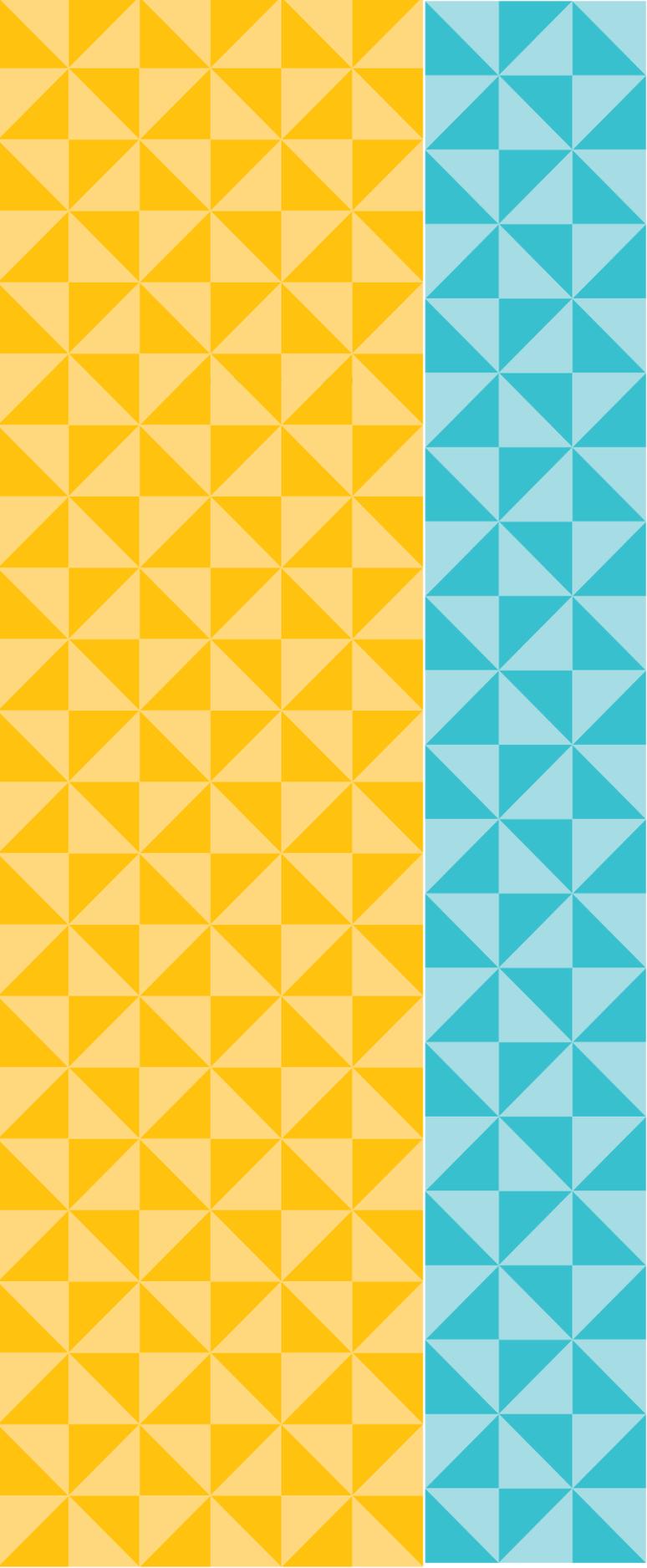
- Bring regional needs and member input into Forum discussions
- Participates in all bi-monthly Forum meetings
- Help shape statewide ideas with regional context
- Work closely with Area Connectors to gather local, on the ground insight
- Support regional activation of Forum priorities and outreach efforts

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

= 17 ABCs

6 Active/Sports/Tournaments

= 6 Active/Sports/Tournaments

1 Community Service

↑ 5 Community Service

7 Conferences/Summit

= 7-8 Conferences/Summit

8 Networking Socials

↓ 6 Networking Socials

2 Sponsored Events

↑ 10+ Sponsored Events

0 (no) Startup Communities

↑ 10+ Startup Events in New Communities

9 Student

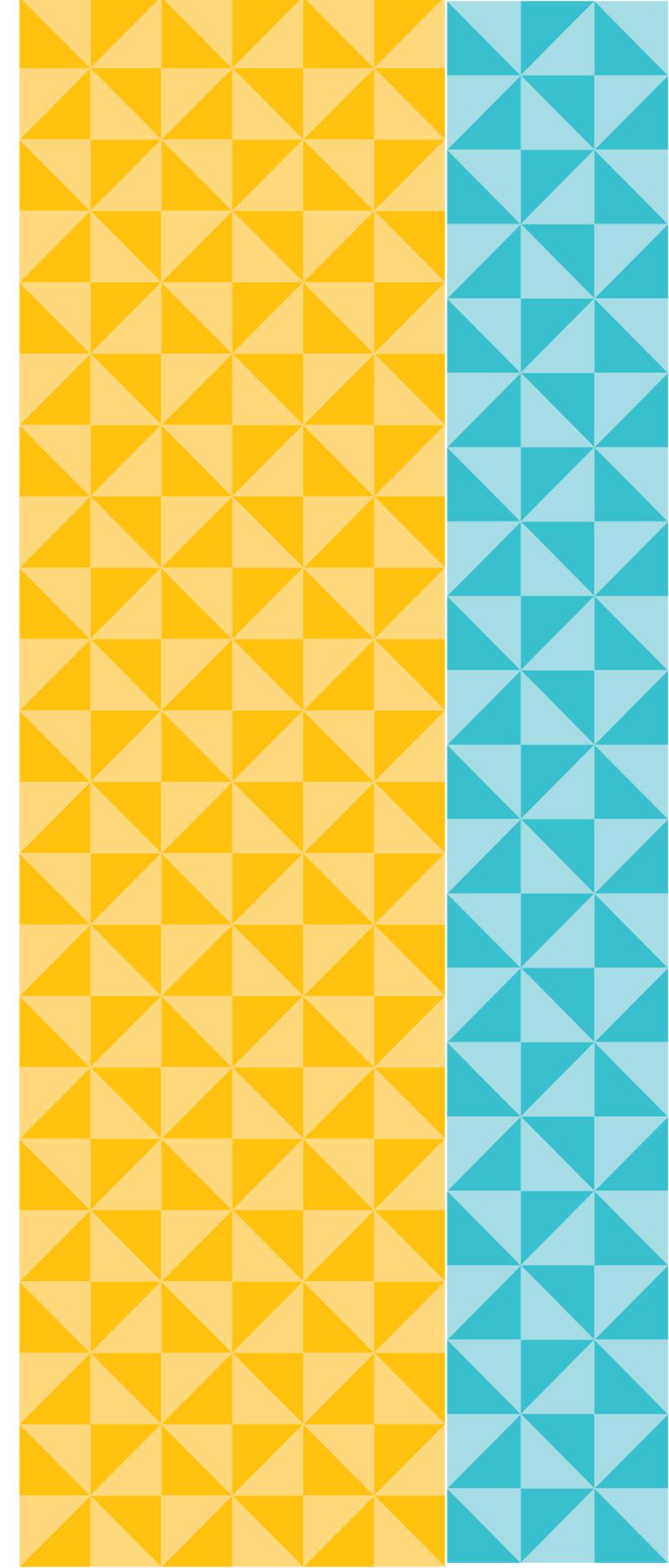
↑ 15 Student

13 Member Led Meet-Ups

↑ 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

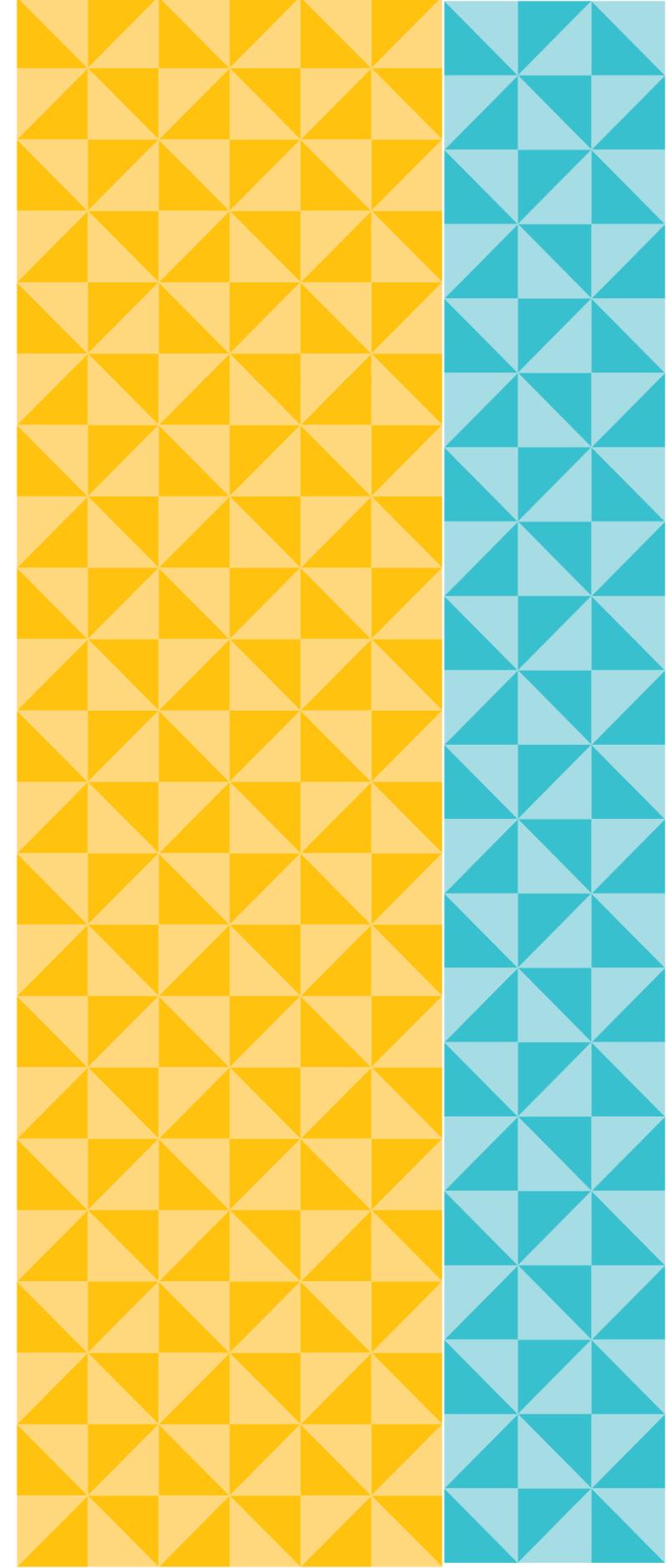
Scholarship distributions to schools and/or students from legacy chapter geographies will continue

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



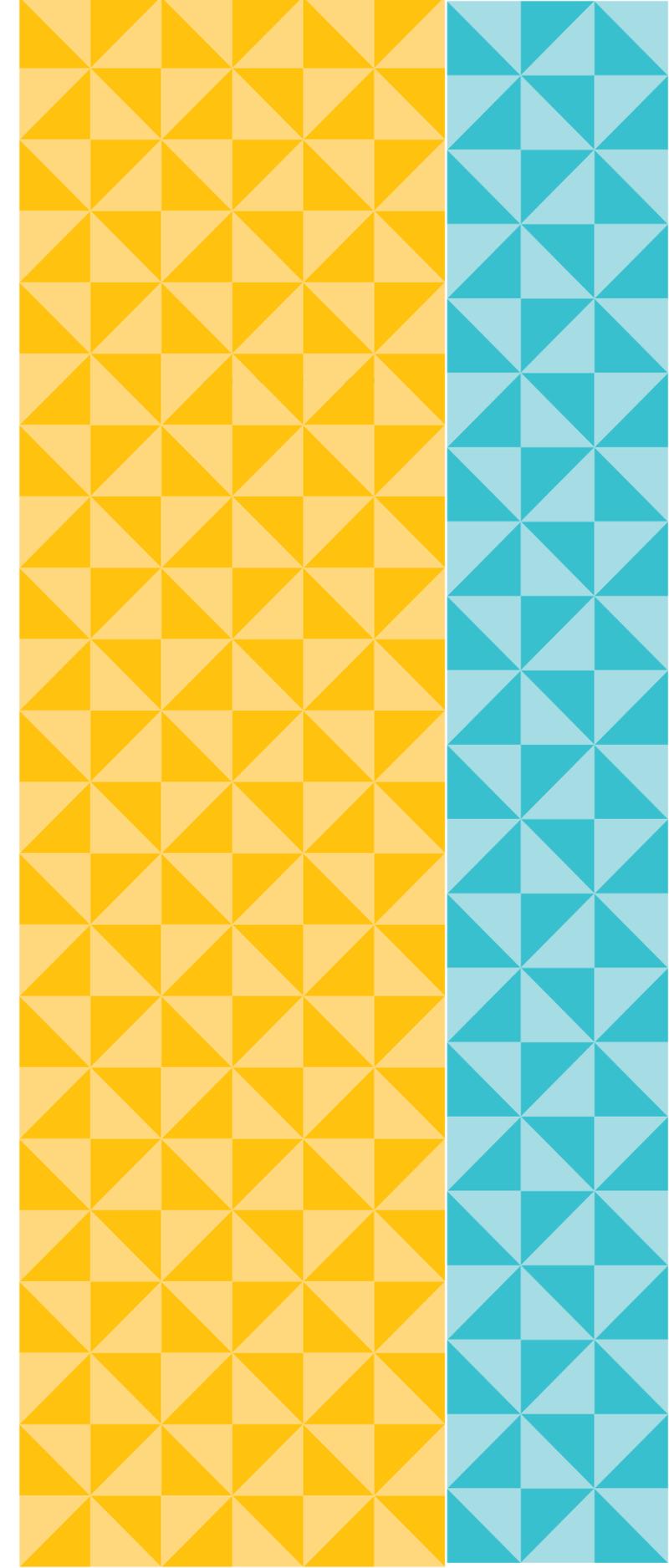
Bylaw Updates & Recommendations

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		