

# CalCPA Modernization

## Key Messages for Chapter Leaders & Board Members

### 1) The Bigger Picture of CalCPA's Modernization

- **CalCPA is modernizing across three pillars: Membership, Knowledge, and Community.** This effort is organization-wide, not a targeted change to chapters. In order to remain relevant and valuable across the board, CalCPA is modernizing in all key areas of the business.
- **The purpose is future-proofing.** CalCPA will stay the premier resource by aligning with member expectations and professional trends.
- **Membership is the pinnacle of engagement.** Clearer value and access, with participation options such as the **Community Pass**.
- **Knowledge is modernized and integrated. Brainfood Bytes, webinars, and the AI Assistant, plus pathways and bundles,** support personalized, outcome-focused learning connected to Community.
- **Community is reimaged.** Borderless, **interest-driven** engagement (hubs, member-led meetups, signature events, special interest communities) supported by members in CA Forums, and advisory councils.
- **Shift to dynamic, personal and customizable participation.** CalCPA is moving from a static, chapter-centric model to **flexible, interest-based participation** across Membership, Knowledge, and Community.
- **Organizations engage too.** The framework creates clear pathways for firms and partners to participate alongside individual members.
- **Operational alignment supports scale.** Consistency and reduced duplication improve quality statewide and lower administrative burden on volunteers.
- **Revenue mix evolves.** Knowledge and Community offerings help diversify non-dues revenue .
- **Volunteer opportunities expand.** This model broadens the access point to engage as a volunteer - from a one-time opportunity to ongoing commitments.

### 2) Why Modernization of CalCPA is Needed

- **Engagement across members and CA as a whole low.** Most members are not connecting, to each other or CalCPA, in the current structure.
- **Events that were once successful are harder to fill.** Attendance is inconsistent across regions and has been declining over the last 10 years.
- **Large portions of the membership are not being reached.** The traditional framework leaves gaps in how people can participate, volunteer and engage. Opening borders and opportunities allows members to customize their journey and involvement.
- **The leadership pipeline has been difficult to fill.** Sustaining volunteers for chapter board roles is a recurring challenge, with unfilled positions increasing each year.
- **Chapters and engagement cannot stay the same.** CalCPA must engage a larger percentage of the community, expand opportunities, reduce duplication, and increase access to leading practices.

- **Member expectations have shifted.** People expect modern technology, flexibility, customization, efficiency and interest-based, as well as in-person geographic engagement.
- **Incremental change is not enough anymore.** Bold, intentional change is required to **future-proof** CalCPA.

### 3) The New Community Framework and What It Means for Leaders

- **The chapter governance structure is ending.** No chapters defined by borders, no chapter boards, no chapter committees, no chapter bylaws, no chapter budgets.
- **Community and volunteerism is organized CA-wide.** Engagement happens through **interest-driven hubs, member-led meetups, signature events, and CA Forums and advisory councils.**
- **Purpose: Empower professionals at every stage** with flexible, interest-driven opportunities for knowledge, connection, leadership, and impact.
- **Signature events remain a centerpiece.** Student Nights, ABC Nights, Golf, Volleyball, and other marquee events continue with **local flavor preserved and logistics supported by CalCPA.**
- **Standardization enables scale.** Templates and CA-wide coordination make successful and experiential events simpler to execute and replicate across California.
- **Scholarships remain central.** Scholarship support for the pipeline continues; statewide integration is being defined.
- **Sponsorships remain vital.** Local opportunities continue and can be built upon, alongside expanded CA-wide packages.
- **Modern leadership pathways replace board roles.** Opportunities to **contribute & connect, lead & facilitate, or shape & strategize** across CA.
- **The Officer Forum preserves prestige.** Past presidents/officers have a visible role in strategic outreach, mentorship, and guidance.
- **Leaders shift from logistics to influence.** Staff and partners execute; leaders help guide strategy, outreach, and engagement.
- **Leaders are ambassadors.** Fiduciary responsibility includes clear, consistent communication and a mindset that is **futurist, innovative, curious, and learning-oriented.**
- **Identity evolves.** Without chapter borders, leaders connect through Forums and pathways aligned with their passions and strengths.
- **Geography still matters—borders do not.** Members can connect locally and CA-wide, with interest-based options layered across CA.
- **Technology is the enabler.** The new community engagement app increases visibility of CA-wide and local opportunities, making participation easier.
- **Iteration will be key.** Launch with core capabilities; refine features and practices based on member and leader feedback.