

## 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.

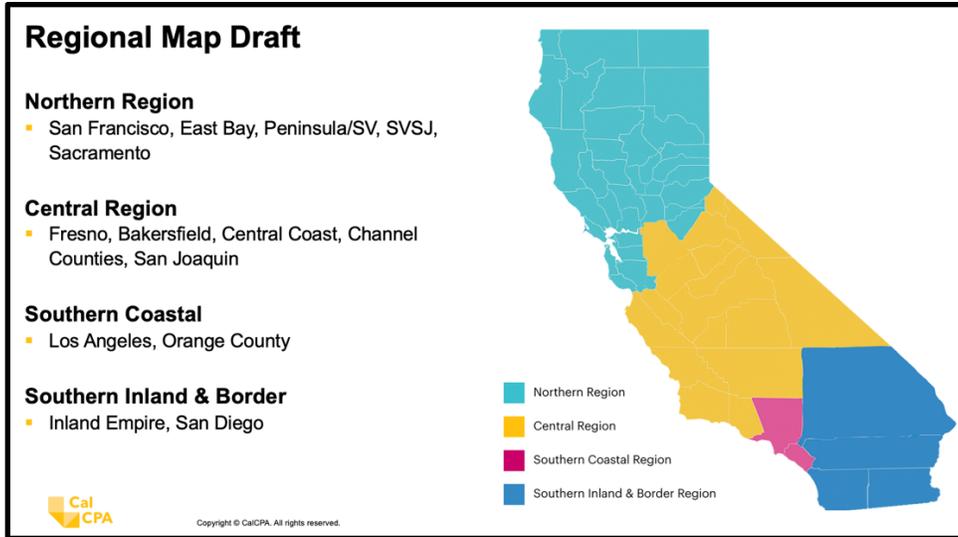
### What's Changing?

- **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
<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

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.

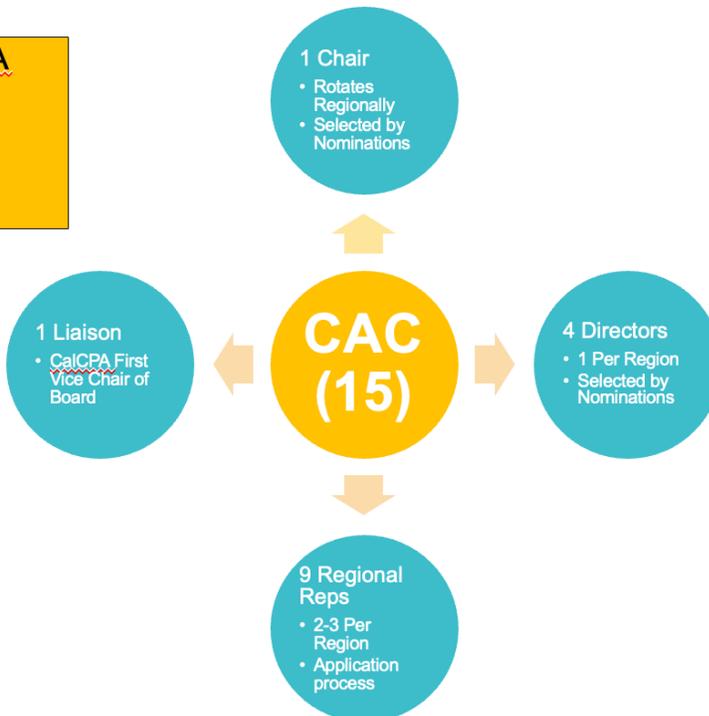


## CAC Composition - Proposed

Automatically on CalCPA

Council (6):

- 1 Chair
- 4 Directors
- 1 Regional Rep.



### 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.

**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



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### Community Engagement Overview—Meeting Frequency and Purpose

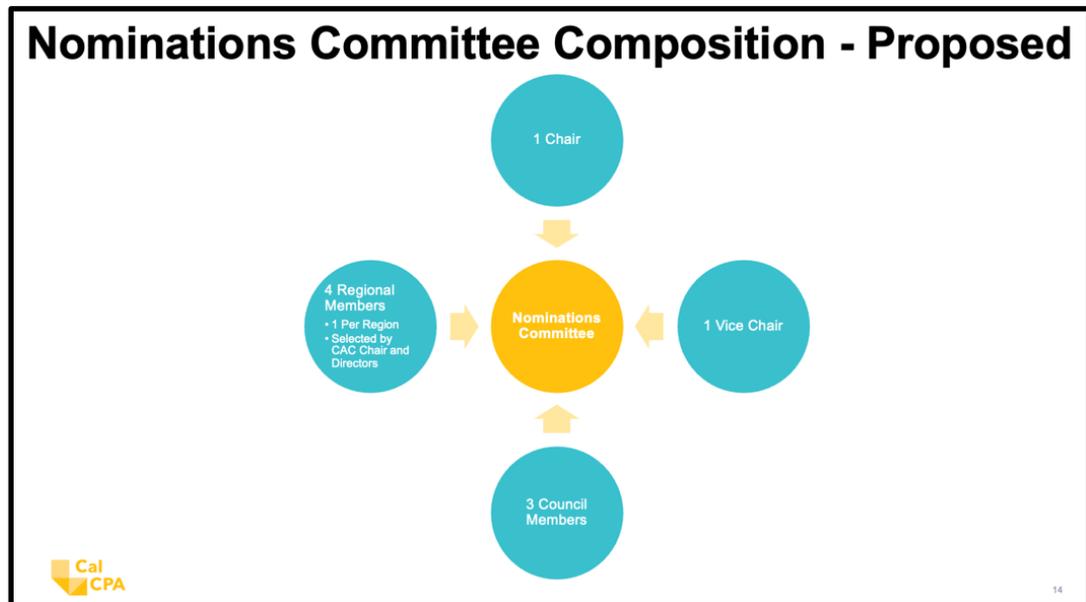
- CAC (Quarterly): Strategy and statewide priorities
- Community Forums (Bi-Monthly): Program design, outreach, and topic-based engagement
- Regional Leaders (Quarterly): Local insight, emerging needs, activation of Area Connectors

### 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

<b>Voting Council Composition – Proposed</b>	
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)

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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

	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.