

## June 2021

### Items to Promote in Newsletter/Website/Social Media:

- Share chapter award winners for previous year.
- Share year-end report.
- Welcome new members.

### Action Items to Complete:

- Approve chapter budget.
- Discuss names to submit for TXCPA Leadership Nominations.
- Circulate non-renewal list.
- Email non-renewed members.
- Circulate prospect list and implement a recruitment campaign in coordination with TXCPA (former and never been a members).
- Send news release about incoming chapter leadership (utilize PR services from TXCPA).
- Contact new members—beginning of month.
- Discuss chapter goals and update status of each.
- Conduct a monthly review of information on the chapter website to ensure that all content is up to date.
- Share community service upcoming plans and current metrics with TXCPA.

### TXCPA CPE/Events

- Texas School Districts Accounting & Auditing—June 7-8
- CPE by the Sea—June 17-18
- CPE Cluster—June 21-23
- TXCPA Annual Meeting—June 24-25

## July 2021

### Items to Promote in Newsletter/Website/Social Media:

- TXCPA Annual Meeting recap.
- Promote the PAC.
- Welcome new members.

### Action Items to Complete:

- Discuss names to submit for TXCPA Leadership Nominations.
- Circulate non-renewal list.
- Email non-renewed members
- Call non-renewed members.
- Contact new members—beginning of month.

- Discuss chapter goals and update status of each.
- Conduct a monthly review of information on the chapter website to ensure that all content is up to date.
- Share community service upcoming plans and current metrics with TXCPA.

#### TXCPA CPE/Events

- Texas Taxes: 2021 Quarterly Updates—July 8 (free as a benefit of membership)
- Advanced Health Care Conference—July 12-13
- CPE Cluster—July 26-28
- Business Valuation, Forensic and Litigation Services Conference—July 29-30

## August 2021

#### Items to Promote in Newsletter/Website/Social Media:

- Promote Career Center.
- Welcome new members.

#### Action Items to Complete:

- Submit names for TXCPA Leadership Nominations.
- Circulate potential drops list.
- Circulate prospect list and implement a recruitment campaign in coordination with TXCPA (former and never been a members).
- Explore CPA Month of Service event for December.
- Consider Meet the Firms event for the fall or spring.
- Consider CPA2B Bootcamp event for fall or spring.
- Email non-renewed members.
- Send PAC letter/email to past contributors.
- Contact new members—beginning of month.
- Discuss chapter goals and update status of each.
- Conduct a monthly review of information on the chapter website to ensure that all content is up to date.
- Share community service upcoming plans and current metrics with TXCPA.

#### TXCPA CPE/Events

- TXCPA Executive Board Meeting—August 5-6
- Chapter Leader Call—August 17
- Professional Issues Update—August 25 (free as a benefit of membership)

## September 2021

### Items to Promote in Newsletter/Website/Social Media:

- Solicit chapter leadership nominations.
- Welcome new members.

### Action Items to Complete:

- Email non-renewed members.
- Contact new members—beginning of month.
- Discuss chapter goals and update status of each.
- Conduct a monthly review of information on the chapter website to ensure that all content is up to date.
- Share community service upcoming plans and current metrics with TXCPA.

### TXCPA CPE/Events

- Chapter Presidents-elect Orientation—TBD
- TXCPA Nominations Committee—TBD
- Single Audits & Governmental Accounting Conference—September 27-28 (Austin)

## October 2021

### Items to Promote in Newsletter/Website/Social Media:

- Promote the PAC.
- Promote CPA Month of Service.
- Solicit nominations for chapter leadership.
- Welcome new members.

### Action Items to Complete:

- Chapter nominating committee begins process of nominations and elections, including allotted representatives to TXCPA Board of Directors.
- Contact new members—beginning of month.
- Discuss chapter goals and update status of each.
- Conduct a monthly review of information on the chapter website to ensure that all content is up to date.
- Share community service upcoming plans and current metrics with TXCPA.

### TXCPA CPE/Events

- Texas Taxes: 2021 Quarterly Updates—October 14 (free as a benefit of membership)
- Financial Institutions Conference—October 18-19 (Dallas)

## November 2021

### Items to Promote in Newsletter/Website/Social Media:

- Promote CPA Month of Service.
- Solicit nominations for chapter leadership.
- Promote Career Center.
- Welcome new members.

### Action Items to Complete:

- Chapter nominating committee produces a slate of candidates for chapter leadership in the following year including allotted representatives to TXCPA Board of Directors.
- Receive update from TXCPA Executive Board on proposed dues for next year.
- Circulate prospect list and implement a recruitment campaign in coordination with TXCPA (former and never been a members).
- Consider nominations for Rising Stars and B&I Award.
- Contact new members—beginning of month.
- Review group billing organizations by chapter.
- Discuss chapter goals and update status of each.
- Conduct a monthly review of information on the chapter website to ensure that all content is up to date.
- Share community service upcoming plans and current metrics with TXCPA

### TXCPA CPE/Events

- TXCPA Executive Board Meeting—November 4-5
- TXCPA Summit 2021—November 8-9 (San Antonio)
- Chapter Leader Call—November 16
- Professional Issues Update—November 17 (free as a benefit of membership)
- Chapter ED Meeting—TBD

## December 2021

### Items to Promote in Newsletter/Website/Social Media:

- Share slate of nominations for chapter leadership in the following year (include continuations).
- Promote chapter member meeting and election next month.
- Welcome new members.

### Action Items to Complete:

- Prepare for state and chapter committee appointments process.
- Contact new members—beginning of month.

- Discuss chapter goals and update status of each.
- Submit nominations for Rising Stars and B&I Award.
- Conduct a monthly review of information on the chapter website to ensure that all content is up to date.
- Share community service upcoming plans and current metrics with TXCPA.

#### TXCPA CPE/Events

- CPE Expo—December 6-7 (San Antonio)
- CPE Expo—December 13-14 (Houston)
- CPE Expo—December 16-17 (Dallas)

## January 2022

#### Items to Promote in Newsletter/Website/Social Media:

- Share slate of nominations for chapter leadership in the following year (include continuations).
- Promote the PAC.
- Promote Career Center.
- Welcome new members.

#### Action Items to Complete:

- Consider chapter leaders planning meeting before the end of May for the upcoming year. Select date. Develop budget based on planning meeting.
- Consider date for an end of year members meeting (ideas for meeting include recognizing chapter award recipients, chapter scholarship recipients and new licensees for the year).
- Encourage members to serve on TXCPA committees and answer the call for volunteers. Submit any chapter recommendations for TXCPA committee nominees.
- Hold chapter member meeting and election per bylaws.
- Contact new members—beginning of month
- Discuss chapter goals and update status of each.
- Conduct a monthly review of information on the chapter website to ensure that all content is up to date
- Share community service upcoming plans and current metrics with TXCPA

#### TXCPA CPE/Events

- Texas Taxes: 2021 Quarterly Updates—January 13 (free as a benefit of membership)
- TXCPA Midyear Board of Directors and Members Meeting—January 21-22

## February 2022

### Items to Promote in Newsletter/Website/Social Media:

- Welcome new members.

### Action Items to Complete:

- Contact new members—beginning of month
- Send PAC letter/email to past contributors.
- Discuss chapter goals and update status of each.
- Conduct a monthly review of information on the chapter website to ensure that all content is up to date
- Share community service upcoming plans and current metrics with TXCPA

### TXCPA CPE/Events

- Chapter Leader Call—February 1
- Professional Issues Update—February 23 (free as a benefit of membership)

## March 2022

### Items to Promote in Newsletter/Website/Social Media:

- Recruit committee leaders and volunteers for upcoming year.
- Welcome new members.

### Action Items to Complete:

- Select chapter committee chairpersons.
- Circulate prospect list and implement a recruitment campaign in coordination with TXCPA (former and never been a members).
- Contact new members—beginning of month.
- Discuss chapter goals and update status of each.
- Conduct a monthly review of information on the chapter website to ensure that all content is up to date.
- Share community service upcoming plans and current metrics with TXCPA.

### TXCPA CPE/Events

- Chapter ED Meeting--TBD

## April 2022

### Items to Promote in Newsletter/Website/Social Media:

- Promote the PAC.
- Recruit committee leaders and volunteers for upcoming year.
- Welcome new members.

Action Items to Complete:

- Select chapter committee chairpersons.
- Joint dues billing begins.
- Submit nominations for TXCPA Awards.
- Begin preparing year-end report.
- Contact new members—beginning of month.
- Discuss chapter goals and update status of each.
- Conduct a monthly review of information on the chapter website to ensure that all content is up to date.
- Share community service upcoming plans and current metrics with TXCPA.

TXCPA CPE/Events

- B&I Month
- Joint Executive Board Meeting—April 28-29

## May 2022

Items to Promote in Newsletter/Website/Social Media:

- Promote Career Center.
- Welcome new members.

Action Items to Complete:

- Email non-renewed members.
- Call non-renewed members—reminders of expiration.
- Submit president-elect's photo for TXCPA Leadership Directory.
- Ensure chapter leaders planning meeting for following year is completed.
- Consider chapter board of directors and volunteer orientation for the upcoming year.
- Budget drafted for new fiscal year.
- Submit year-end report by May 20.
- Contact new members—beginning of month.
- Discuss chapter goals and update status of each.
- Conduct a monthly review of information on the chapter website to ensure that all content is up to date.
- Share community service upcoming plans and current metrics with TXCPA.

TXCPA CPE/Events

- Texas CPA Technology Conference—TBD
- Nonprofits Conference—TBD
- Energy Conference—TBD
- Chapter Leader Call—May 10