

CalCPA Strategic Plan—FY09–11

Strategic Priority: Advocate for members on issues that affect the profession.

Objective	Referral	Status
Dedicate staff and fiscal resources to help shape legislative and regulatory policy in California to achieve key organizational objectives including mobility, substantial equivalency, mandatory peer review and requirements for inactive CPAs. Educate key stakeholders.	Government Relations Committee; leadership; staff	(2-3 years) In progress
Establish CalCPA and its members as thought leaders who are sought after to comment on and educate key stakeholders (including legislators and the public) on issues related to a CPA's expertise.	Statewide technical committees; Communications Advisory Committee; staff	Ongoing
Support a strong licensing and enforcement program in California. Create various means to bridge California Board of Accountancy shortfalls (e.g., answering licensing questions) as well as support member participation on the board and its administrative committees.	Government Relations Committee; staff	(3-5 years) Assigned
Increase CalCPA visibility with state and local government officials.	Government Relations Committee; Communications Advisory Committee; chapter leadership; staff	Ongoing
Develop strategies to enhance communication of CalCPA legislative and regulatory advocacy efforts to members.	Government Relations Committee; Communications Advisory Committee; staff	(1-2 years) Assigned
Enhance and strengthen grassroots program.	Government Relations Committee; Communications Advisory Committee; chapter leadership; staff	(1-2 years) Assigned/Ongoing
Explore ways to strengthen joint ventures with other state societies, national and international organizations with common interests to strengthen the profession beyond California's borders.	Executive office; strategic relations; Education Foundation; chapters; staff	(3-5 years) Assigned/Ongoing

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Strategic Priority: Enhance and promote the visibility of the profession and CalCPA.		
Objective	Referral	Status
Develop and implement strategies to enhance CalCPA visibility at college and universities both with students and educators.	Accounting Education Committee; CalCPA Institute board; chapters; staff; YEP chapter chairs	(1-5 years) In progress
Enhance CalCPA’s brand with key audiences through targeted campaigns focused on media outreach, membership recruitment and membership retention.	Staff; Communications Advisory Committee; Membership Committee; and all chapters, state committees and sections	Ongoing
Develop and implement strategies to raise awareness of the full spectrum of CPA services, including specialization.	Staff; Communications Advisory Committee; Accounting Education Committee; YEP chapter chairs	Ongoing
Develop and implement strategies to encourage employers to support participation in CalCPA; build an understanding that CalCPA helps CPAs do their jobs better.	Staff; Membership Committee	(1-3 years) Assigned
Position CalCPA and its members as thought leaders.	Staff; and all leadership, chapters, state committees and sections	Ongoing
Create opportunities and tools to increase peer-to-peer promotion of CalCPA.	Staff; and all leadership, chapters, state committees and sections	(1-3 years) Assigned
Enhance visibility of CalCPA Institute with key audiences such as business decision makers, legislators and nonprofit community.	Staff, Financial Literacy Committee, Accounting Education Committee	(1-3 years) Assigned
Build more strategic alliances.	Staff; and all leadership, chapters, state committees and sections	Ongoing

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Strategic Priority: Attract, educate and support CPAs in their professional and personal development.		
Objective	Referral	Status
Position CalCPA as the first place for CPAs to go for professional support—technical advice, networking, career building, etc. Leverage what CalCPA does best, more efficiently and for free (i.e. included in price of membership).	Staff; and all leadership, chapters, state committees and sections	Ongoing
Develop strategies to broadly address accounting education needs and issues, expanding CalCPA’s focus beyond student scholarships.	Staff; Accounting Education Committee; chapters; CalCPA Institute Board; chapter scholarship chair	(1-5 years) In progress
Enhance menu of products and services to support a CPA’s full professional life cycle, from outreach to students to helping retirees exit the profession.	Staff; and state committees and sections	Ongoing
Develop and enhance strategies to build connectivity among members to enable them to leverage their peer networks.	Staff; and all leadership, chapters, state committees and sections	(1-3 years) Assigned
Expand leadership opportunities and training at the local (chapter) level.	Chapters and staff	(1-3 years) Assigned
Educate members on professional rules and standards and best practices. Support member compliance with laws and standards.	Staff; and state committees and sections	Ongoing
Develop strategies to support a bottom-up mentoring program that encourages relationship building across generations and disciplines.	Chapters; staff; chapter YEP committee chairs	(1-3 years) Assigned
Develop strategies to increase visibility of small CPA firms in campus recruiting.	Chapters and staff	Ongoing