



Campus Ambassador  
Guidebook



Dear CalCPA Campus Ambassador,

Congratulations on choosing to embark on this exciting adventure with CalCPA. You'll be amazed at all the places the Campus Ambassador program will take you.

As a CalCPA Campus Ambassador, you will be responsible for achieving the important goal of **recruiting new student members**. You'll do this by;

- increasing awareness of CalCPA free student membership benefits for students and educators on your campus
- Connecting with accounting educators and administrators and working with your local chapters.

To help you get your creative juices flowing and map out your journey, we've created this guidebook for your reference. It includes ideas and resources for meeting all of your goals and information on who to contact if you need support along the way. While we want to offer encouragement, we don't want to keep you from thinking outside the box—you're more than welcome to come up with your own ideas to meet your goals—just make sure to keep us informed about your plans.

CalCPA Campus Ambassadors not only reach their program goals, they show off their organization, communication and networking skills. All of which will be even more important when you earn the right to add three special letters at the end of your name.

We hope you have a great time as a Campus Ambassador and perhaps inspire others to follow suit and discover the wide world of adventure available to Certified Public Accountants.

Bon Voyage!  
CalCPA



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## Climbing the Membership Mountain

Being a Campus Ambassador means sharing your knowledge of CalCPA with your peers and professors. Many students, candidates and educators have yet to discover all the benefits available to them when they take advantage of FREE membership in CalCPA. To help you spread the word about CalCPA membership, we've created brief talking points and brochures for each type of membership.

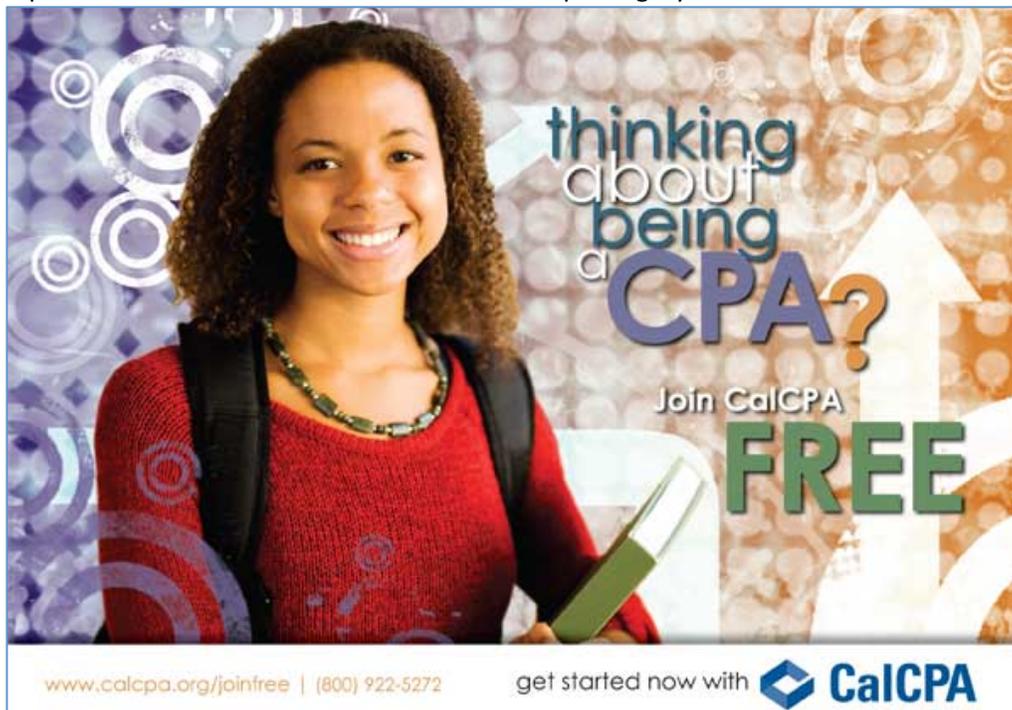
### Student Membership

Undergraduate students can join CalCPA for FREE and utilize specific member resources intended to help launch a CPA Career. Sign up at [www.calcpa.org/joinfree](http://www.calcpa.org/joinfree)

CalCPA student membership includes:

- FREE resumé upload to CalCPA job board
- Events specifically for students throughout the academic calendar year
- Information on what it takes to become a CPA
- Member-only discounts on CPA Exam review courses and auto insurance
- Scholarships
- FREE webcasts on hot topics for students
- Digital *California CPA* magazine subscription
- Local networking opportunities
- Firm Guide (access to information on our 100% firms)

A CalCPA student member is any person who is a full-time or part-time undergraduate student and has never been licensed as a CPA, nor achieved a bachelor's degree. Upon graduation, students' membership is transitioned to the candidate membership category.



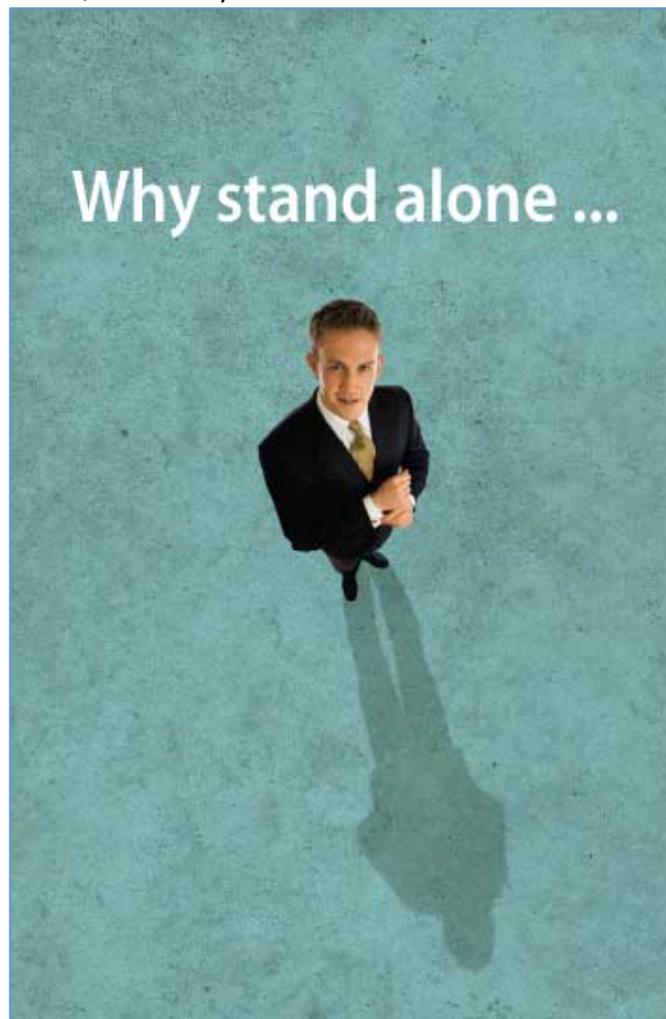
Student Membership Brochure  
**Candidate Membership**

Graduate students and recent graduates receive a year of free candidate membership to advance their CPA careers.

CalCPA candidate membership includes:

- FREE resume upload to CalCPA job board
- Information on what it takes to become a CPA
- Member-only discounts on CPA Exam review courses and auto insurance
- Graduate and Post-Graduate Degree Scholarships
- *California CPA* magazine subscription (Digital and print)
- Local networking opportunities

A candidate is any person who has a bachelor's degree, has never been licensed and is pursuing pathway to licensure via the California Board of Accountancy. Graduate students pursuing CPA licensure fall under the candidate membership category. First membership year for candidates is free; after first year, membership dues increase to \$50 annually.



## Candidate Membership Brochure

### **Educator Membership**

Accounting educators help shape the future of the profession. CalCPA is committed to supporting educators in their efforts to provide quality accounting education and reach the thousands of future CPAs that sit in their classrooms.

CalCPA educator membership includes:

- Free eLearning pass (\$629 value) through the CalCPA Education Foundation
- Access to resources for students, including Quest magazine, the CPA Careers Video, guides to becoming a California CPA and more
- eBulletins, including Accounting Educator Buzz and YEP Connection
- Refocused scholarship efforts that not only help students, but strengthen accounting and business departments around the state
- Easy access to CalCPA members to help support accounting and business departments in colleges and universities in California with recruiting, advisory committees, guest speakers, funding, etc
- Access to the latest news, trends and information impacting the accounting profession

An educator must be employed full-time as a high school, college or university educator, administrator or guidance counselor. Part-time educators, administrators or guidance counselors are also eligible if not employed elsewhere.



Educator Membership Brochure

## Checklist on Recruiting New Members

You are our eyes and ears of CalCPA! To help you reach your main goal of bringing on board new members, here's a list of items that you'll need to perform to reach that goal.

- ✓ Reach out to all Accounting faculty members or lecturers and ask if you may make a short 5 minute announcement about CalCPA before or during a class. (We can send you some items and giveaways to hand out)
- ✓ Set up a coffee date with a Beta Alpha Psi or Accounting Society officer to discuss the benefits of CalCPA and possibly co-host an event together. (We'll pay for coffee!)
- ✓ Schedule a phone call or meeting with your chapter's program associate to introduce yourself. They'll be a great resource to help get you in touch with possible speakers for any events you would like to plan, will keep you in the know about chapter events where they can introduce you to professionals in the accounting profession. You can also get involved with the chapter and join planning committees where you will work side by side with CPAs and professionals.
- ✓ Still have any connections to your high school? Help with CalCPA's diversity and inclusion program and schedule a presentation in a classroom where you talk about majoring in accounting, what life is like in college or a financial literacy presentation.
- ✓ Host a CalCPA event on campus. You can do this jointly with Beta Alpha Psi or with Roger CPA review, Wiley or Becker. Contact info for these reps may be acquired from your chapter program associate.

## Step by Step Guide on Hosting an Event

As a CalCPA member, you know that being a CPA is much more than hiding behind a stack of papers in a cubicle, and as a Campus Ambassador it is your job to share the outgoing side of the profession with your peers. Whether you want to commandeer the agenda of an Accounting society or Beta Alpha Psi meeting, make a presentation to new accounting students during their orientation or reach the whole student body, this section is all about making your event a success. Here's some tips on getting your event off the ground!

1. **What type of event do you want to hold?** Here's some examples
  - Panel presentation or single speaker on a specific topic
    - Choosing the Right Major to Pursue Your Dream Career
    - Why Become a CPA?
    - Partner, Controller and CFO, Learn More about CPA Careers
    - Forensic Accounting info session
  - Informational event with Roger CPA Review or Becker to review exam prep and what to expect on the exam
  - Have a favorite accounting professor? Work together on an info session where you talk to students about the requirements and classes needed to sit for the CPA exam
  - Financial Literacy event
    - How to save money while in college
    - Student loan info

Please keep in mind that these are only suggestions. Feel free to be creative. We are also here to help you during this process, so feel free to bounce off ideas while you're planning.

2. **Getting your event up and running** – Now that you know what kind of event you want to hold, here's the next steps:
  - **Decide on the location** – Where on campus can you hold the event? If you're working on a joint event with Beta Alpha Psi or the Accounting Society, do they have a meeting space that you can reserve, perhaps you can ask to be scheduled during an already reserved meeting time.
  - **Decide on a date and time** – Once you have a location set, reserve the date and time. Think about when you think most students would be free, is it in the middle of the day, evening, Thursday night?
  - **Confirm speakers** – once you have your topic, date, time and location set, reach out to your chapter Program Associate or Jackie Quinn-Piper to find an available speaker(s). Make sure to do this well in advance as professionals have a busy schedule and need advance notice. Give them at least a month's notice if not more.
  - **Advertise your event** – Send me (Jackie Quinn-Piper) an email and let me know all the details of your event; Date, Time, location, Topic, Speaker names and a

short blurb about what the event is about. I'll put in a request to get a flier made. This is usually about a two week turn around, so as soon as you have your details nailed down, send your request in. Then you may post fliers, upload to facebook, linkedin, Instagram etc... and let everyone know about your event!

- **Order Refreshments** – This might be the most important one. For your event, you get an allowance of \$150 to use towards food and beverages (sorry, only non-alcoholic). Have a favorite pizza place? Know of a great ice cream sandwich location? Decide what kind of food you want to entice people with. You can pay for it by **1)** placing the order and I can call with my credit card info. Then send me the receipt, or **2)** you pay for it and send me the receipt for reimbursement

## After the Event or Presentation



We trust that you're getting the job done, but...

When you've completed an item on the checklist, make sure you do the following so that you receive credit for your work.

1. Log on to the shared Excel Doc, and enter in what you've completed. If you don't have anything for that month, you can enter what you're working on. This needs to be completed by the second Friday of the month.

<https://docs.google.com/spreadsheets/d/1wYDzWGwlonQH7jQHU6ihuKNIKOMtIB2GQwn80dgHd0/edit?usp=sharing>

2. Take photos during your event and email to me @jacqueline.quinn-piper@calcpa.org I'll also post these on our ambassador facebook page.
3. If you've made a presentation in class, please have your professor sign off on the student member sign up sheet.



## How to be a Successful Campus Ambassador and other tips

We know that you have a busy life with school, other jobs, and your personal lives. We want to make sure that we provide you with the tools and resources you need to be a successful campus ambassador.

1. To keep yourself organized, plot out your CalCPA outreach timeline. An example would be something like this:
  - a. Sept. 10 – Reach out to professor to schedule a 5 minute class presentation
    - i. Schedule the date for two weeks away
    - ii. Order supplies at least a week in advance to distribute to the class
  - b. Oct. 1 - Start planning for a joint Wiley and CalCPA event on campus
    - i. Pick a date and time at least 6- 8 weeks away (Nov. 8) reserve a room on campus.
    - ii. As soon as date/time are picked, contact Wiley rep to see if they are available (also keep your PA posted as they can help too)
    - iii. Reach out to Jackie to get a flier made (takes about 2 weeks)
    - iv. 2 weeks prior to your event order food or plan on what refreshments you will have
    - v. Post fliers, make announcements
  - c. Nov. 5 – reach out to a Beta Alpha Psi or Acctg Society officer for a coffee date

And you're done with your first term! Keep in mind, this is just an example of what/how you can plan your time and what you may want to do. You are able to hold whatever kind of events you would like and reach fellow peers about CalCPA in any way you like. As long as you're getting the job done, we're happy!

### To Keep in Mind

1. When planning an event that will require guest speakers, be cognizant of their time. They need **at least 2 weeks' notice**. It is important to keep this in mind, these are busy professionals that are going out of their way to help you out. This may turn into a future job referral or internship. You want to make the best impression you possibly can. Also, keep in mind the date of the event. **Do not schedule around holiday breaks or when you anticipate not a lot of students being around.**
2. This goes also with reaching out to your program associate. If you are requesting their help to find speakers, they need enough time to reach out. They also are clued into your chapter's board of director's made up of professionals who are enthusiastic about working with students. Make the most out of your time as an ambassador and get to know them. You never know what introductions you get from them can lead to!

### **After your event**

After your event, please be sure to handwrite a thank you note to your speaker(s). They have shared their valuable time and you want to make sure they'll be eager to present to you again or be willing recommend another presenter of interest. To really make your note stand out mention the information you found particularly useful. If you were able to take any pictures of the event, send them to Jackie ([Jacqueline.quinn-piper@calcpa.org](mailto:Jacqueline.quinn-piper@calcpa.org)) with a brief description so they may be added to the campus ambassador facebook page.

Thinking about going above and beyond? Have some of your attendees contribute by including multiple notes of appreciation or having them post their favorite moments on Facebook or Twitter.

## Connecting with the Locals

One of the most important parts of your role as a CalCPA Campus Ambassador is making sure that your peers don't just sign up for membership, but that they actually get involved as new CalCPA members. CalCPA membership has so many benefits it can be difficult to know where to get started as a new member, which is where you come in.

### **Getting to Know What Your Chapter Offers**

How do you spread the news about what's going on with CalCPA? You'll want to check your chapter email blasts and regularly check the career center section of the website for chapter and state events. It's also easy to get the latest updates by staying active in Connect—CalCPA's online community—liking CalCPA on Facebook, joining our group on LinkedIn and following @Cal\_CPA and @CalCPA\_Students on Twitter. Ensuring CalCPA's professional members know what you're up to by posting updates about your Campus Ambassador activities all over social media is critical to a successful Campus Ambassador journey.

### **Communicating with the Local Chapter**

Not only does the CalCPA staff want to know what you're doing, chapter members are eager to hear about all of your good work. Sharing updates on Connect, Facebook, LinkedIn and Twitter allow members to sing your praises. Also, reaching out to members you meet at chapter events to participate in your events on campus gives them the opportunity to see you in action.



## Mapping Your Progress

### Campus Ambassador Mid Report

**Please return to Jacqueline Quinn-Piper no later than Friday, January 10, 2020.**

Name:

School:

What are your future plans? Please check all that apply.

- Continuing to work toward bachelor's degree
- Graduating
- Working full-time
- Working in an internship
- Continuing education in a master's program
- Continuing education to earn 150 semester units

Have you schedule any parts of the CPA Exam? If so, please list the part(s) you have scheduled with the corresponding date(s).

Please list all programs and events, membership drives, scholarship announcements and community outreach you conducted during the spring 2017 term.

How would you change the Campus Ambassador program to make it more successful at your school?

Are there any groups on campus whose support would help the Campus Ambassador program be more successful?

What can CalCPA staff do to help you execute the program more successfully on your campus?



If you had additional funds for the Campus Ambassador program, what might you have done differently?

What have you learned from your experience as a Campus Ambassador?

What challenges did you face as a Campus Ambassador?

What is the biggest obstacle you experienced in getting students to sign up for CalCPA membership?

What is the greatest benefit of membership in CalCPA for students?

Are there any additional benefits you would recommend CalCPA offer for student members?

How will your experience as a Campus Ambassador help you in your future educational and professional pursuits?



## Ordering Materials

Please utilize this [http://www.colorprint.com/customer\\_portal/login.html](http://www.colorprint.com/customer_portal/login.html) to order materials and supplies for your events. It's also a good idea to keep some in stock to handout to students and faculty.

You will receive an attachment via email with your username and login.

You will use the Institute drop down, and may order up to 100 items at a time.



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After reviewing your Campus Ambassador Guidebook, we think you are ready to brave your quest. We have no doubt that you'll do a great job and we hope that fulfilling your mission as a Campus Ambassador kindles your enthusiasm for CalCPA and the CPA profession. We can't wait to hear your on-the-job anecdotes and we'll be ready to get out the trumpets to celebrate as you achieve your goals each semester. We welcome your creativity and hope to see lots of activities outside the ideas we've offered.

Good Luck!

