



OUTREACH PLAN

2025

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California Board of Accountancy Mission and Vision

The California Board of Accountancy (CBA) is committed to its mission of consumer protection and vision of promoting public trust in the accountancy profession. Through strategically aligned outreach efforts, the CBA endeavors to position itself as a reliable authority, fostering confidence and integrity among all stakeholders. The CBA strives to be viewed as a trusted, supportive, and credible organization dedicated to ensuring high standards in the profession. The 2025 Outreach Plan provides the framework for how the CBA intends to craft its outreach activities this year in pursuit of these goals.

Outreach Mission

Brand the CBA as a trusted, supportive, and competent organization, so it is viewed with confidence by stakeholders.

The CBA is rebranding its communications and outreach efforts in 2025 as simply outreach. Beginning this year, the previously titled Communications and Outreach Plan will similarly be renamed as the Outreach Plan (Plan).

Strategic Goals

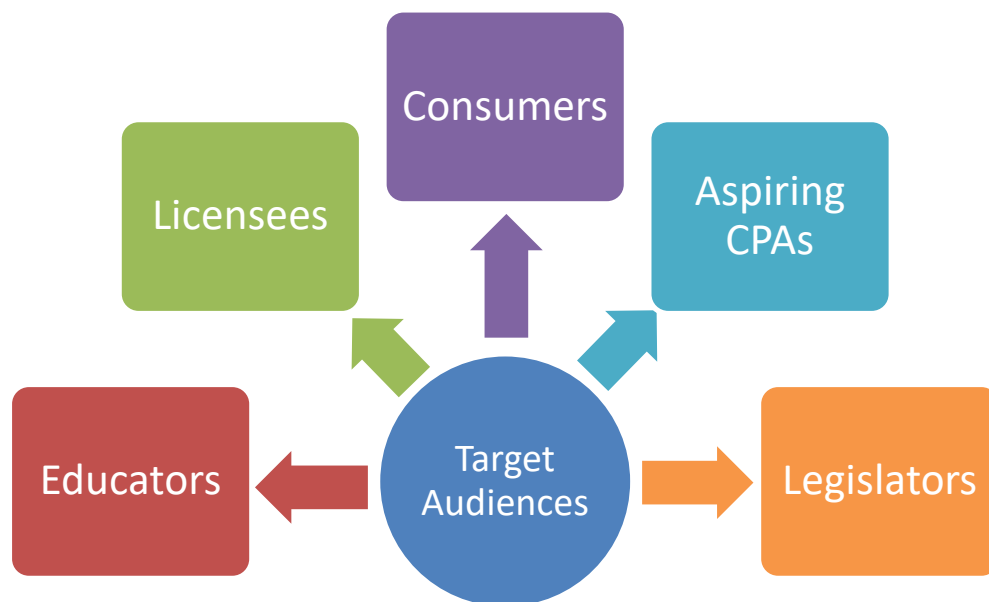
The following strategic goals make up the framework of the CBA's outreach mission:

- Build trust and understanding of the CBA's role among a variety of audiences.
- Empower consumers with tools and knowledge to make informed decisions about CPAs.
- Ensure applicants have a solid understanding of the licensing process through outreach and informative resource materials.
- Cultivate relationships with stakeholders, partners, and media to amplify reach and credibility.
- Promote inclusivity in outreach by addressing cultural, linguistic, and accessibility needs.
- Drive stakeholders to the CBA website as their primary resource for information and services.
- Increase stakeholder connections through dynamic in-person events and interactive virtual experiences.



Target Audiences and Messaging

The CBA focuses its outreach activities on several distinct audiences. To communicate effectively and achieve the strategic goals particular to each audience, the CBA should be thoughtful of each audience's interests and needs and how they align with the CBA's mission. The CBA must also be mindful that each audience is made up of individuals with a variety of perspectives, backgrounds, and experiences, and may need to tailor the messaging even within a particular audience.



The primary messaging goal for all target audiences is to raise awareness of the CBA and its role, so it can be seen as a trusted, supportive, and competent organization.

Consumers

As the direct beneficiary of the CBA's mission and vision, consumers are a primary audience for the CBA's outreach activities. The term refers generally to individuals and businesses that directly or indirectly use or rely on the services of CPAs or accounting firms. This audience is broad and diverse and may be segmented into various sub-groups (e.g., general public, small businesses, elders) depending upon the goals of a certain campaign.

Developing relationships with organizations that represent different consumer groups (e.g., local chambers of commerce or organizations that represent specific industries) can help to amplify the CBA's outreach and add credibility to its efforts. Responding to consumer inquiries in a timely and thorough manner is an opportunity to provide the public with excellent customer service.

Messaging for this audience may include:

- Understanding of the services provided by CPAs and accounting firms.
 - Guidance to choose a CPA suitable for their needs.
 - Understanding qualified vs. authorized (attest authority).
 - Small business assistance.
- Knowledge of the complaint and enforcement process.
 - License Lookup and public enforcement document searches.
 - How to identify and report unlicensed activity.
- The CBA's responsibility for issuing and renewing CPA licenses in California.
 - Ensuring only qualified licensees practice public accountancy.
- Financial Literacy
 - Personal Finance content and resources.
 - How to prevent and recognize elder financial abuse.

Aspiring CPAs

Whether applying to sit for the Uniform CPA Examination (CPA Exam), pursuing initial licensure, or still considering a career in accounting, aspiring CPAs seek to gain a fuller understanding of the CBA's examination, education, and experience requirements for CPA licensure.

This audience routinely experiences significant turnover as individuals explore their initial interest in the CPA profession. A majority are students (whether already at a college/university or still in high school), or recent graduates. The goal of CBA outreach to this audience is to help them through the application process and eventually move into the next audience group, licensees. This important time in the development of their career begins a potentially life-long relationship with the individual.

The CBA also wants to help create the next generation of Aspiring CPAs through outreach targeted at the younger portion of this audience, often high school or even middle school students.

Messaging for this audience may include:

- Awareness of the accounting profession and career opportunities.
 - Educating about the CPA profession and the benefits of CPA licensure.
 - New CPAs continue to be in high demand.
- Understanding of the requirements and process to obtain a CPA license.
 - Awareness of resources available on CBA website.
- Knowledge of potential upcoming licensure requirement changes.

Licensees

This large audience is comprised of active and inactive CPAs and accounting firms licensed by the CBA, out-of-state accounting firms registered with the CBA, and CPAs licensed by another jurisdiction practicing in California through the mobility program.

The CBA has significant contact with this audience on a wide variety of matters, including renewal requirements and enforcement.

Messaging for this audience may include:

- Understanding of the License Renewal process.
 - CBA Connect
 - How to create an account.
 - How to upload continuing education (CE).
 - CE requirements
 - 20/12 first-year requirement
 - Peer Review requirement
- Understanding of the Enforcement process.
 - Knowledge of due process rights.
 - Probation terms, if subject.
- Understanding of Business-Related Aspects.
 - Responsibilities and duties to clients.
 - Knowledge of the Mobility program.
 - Awareness of potential upcoming changes to mobility.
 - Knowledge of small business registration requirements.
- Opportunities to serve on the CBA or one of its advisory committees.

Educators

Educators play a critical role in shaping the future of the accountancy profession by influencing the next generation of professionals. As key figures in the development of students' academic and career paths, educators serve as trusted advisors and mentors, providing important guidance to their students. Reaching this key audience helps the CBA to ensure that students are well-informed about the benefits of pursuing a career in accounting, the importance of licensure, and the process to achieving licensure.

Messaging for this audience may include:

- Understanding of the requirements and process to obtain a CPA license.
 - Awareness of resources available on the CBA website.
- Knowledge of potential upcoming educational requirement changes for licensure.
- Opportunities to partner with the CBA for outreach events with their students.

Elected Officials and Legislators

This audience includes the various elements of the Governor's Administration (Governor's Office; Department of Finance; Office of Administrative Law; Business, Consumer Services and Housing Agency; and Department of Consumer Affairs (DCA)) and members and committees of the Legislature. These entities and individuals have significant program oversight and budgetary control over the CBA.

Specifically, this group approves the CBA's annual budget and has authority to approve or deny statutory and regulatory changes desired by the CBA. In addition, by statute, the CBA must be reauthorized by the Legislature every four years through the sunset review process. It is imperative to maintain this audience's knowledge base of the CBA, and to identify and cultivate positive, strategically valuable relationships with individuals who can support the CBA's policy goals.

Messaging for this audience may include:

- Understanding the value of the CBA and its role.
 - Seeing the CBA as a resource to their constituents and the public.
 - Seeing the CBA as appropriately sensitive, emphasizing its role of consumer protection while balancing the needs of applicants, licensees, and other stakeholders.
- Showcasing the importance of the CBA's existence and structure (for sunset review and collaboration efforts).
- Presenting legislative proposals that relate to the regulation of the accounting profession in California and assist the CBA in accomplishing its consumer protection mission.

Partnerships

Developing and nurturing relationships with outside organizations adds significant value to the CBA's outreach efforts. Partners lend their credibility and communication assets, thereby extending the reach and effectiveness of CBA outreach. Finding partners that share similar goals with the CBA can make the relationship mutually beneficial and even more valuable. Maintaining partnerships takes time and sustained effort but can lead to significant benefits to the CBA. Partnerships are also listed in this Plan as a CBA Outreach Asset.

Organizations

Three current examples of key organizational partners are the California Society of Certified Public Accountants (CalCPA), National Association of State Boards of Accountancy (NASBA), and American Institute of Certified Public Accountants (AICPA).

CalCPA and NASBA both possess knowledge, experience, relationships, and assets that can help the CBA craft and deliver effective messaging. CalCPA has relationships with many California college/university faculty and with state government stakeholders. The AICPA provides valuable content the CBA can share with its audiences to keep them informed about the CPA Exam. These relationships are critical to growing the success of the CBA's outreach program.

Educational Institutions

While educators are a key audience of the CBA, educational institutions can be valuable partners. The CBA's educational requirements for licensure require every applicant to graduate from an accredited academic institution or receive a comparable education at a foreign college or university. As a result, educational institutions are an important component to producing the next generation of CPAs and have direct, sustained opportunities to communicate with the CBA's current and future applicants.

Because of the CBA's success with college/university outreach events in recent years, it has developed relationships with faculty and administration at certain schools. Continuing to develop new relationships among educational institutions directly supports CBA outreach efforts with Aspiring CPAs.

Media

The media umbrella is expanding with the inclusion of new media sources such as social media, blogs, and other internet-based platforms. Especially with younger audiences, these sources are relied on more heavily than traditional media outlets like print, radio, and television. All of these can serve as vital

partners in amplifying the CBA's messaging to audiences beyond its direct reach. Building partnerships with influencers (new media) or California media outlets (traditional media) can both be beneficial. The CBA achieves this by crafting and sharing stories that align with the interests of an outlet's audience. This outreach can take the form of News Releases or more informal communications.

Consumer Protection Organizations

The Legislature established the CBA to provide and ensure consumer protection with regulatory oversight of the accounting profession in California. Establishing and building relationships with like-minded consumer protection organizations creates an opportunity for collaboration and expanding the CBA's reach to a broader audience.

A current example of such a partner is the Alliance for Responsible Professional Licensing, or ARPL, an organization comprised of national associations representing technical professions and their state licensing boards. Its philosophies and goals are consumer-focused, via emphasizing the importance of professional licensure.

Outreach Assets

To have a successful outreach program, the CBA must employ a variety of assets appropriate to the intended audience that support the desired message. An asset is a resource that the CBA has either direct or indirect control over.

- CBA members, committee members, and staff (including multilingual members)
- CBA website
- *UPDATE* newsletter
- Social media accounts (LinkedIn, Facebook, X, Instagram, YouTube)
- Data and analytic tools (Google Analytics, social media insights data, etc.)
- Events (in person or virtual)
- News Releases
- Email (ListSERV)
- Videos
- Podcasts
- Brochures, flyers, or other printed materials
- Monthly Report of the Executive Officer
- Digital graphics
- Surveys
- Handbooks
- QR Codes
- Direct mail
- Partnerships
- Other state and federal agencies

2025 Priorities

To reach the CBA's identified target audiences in 2025, the CBA's outreach priorities are identified below. In implementing these priorities, the CBA will be mindful of inclusivity and accessibility to reach all California stakeholders:

Legislative Proposals

With the CBA anticipating sponsoring legislation in the 2025 session, it will be paramount to communicate its progress effectively to stakeholders, especially students/future applicants that will be directly affected by the proposed legislative changes. A new webpage will be created as a repository of information and resources if the legislation moves forward. Social media will be an important source of updates for stakeholders as the process develops.

Point-in-Time Email Communication

The CBA will develop messaging to be emailed to licensees at various point of their license cycle. These communications will include reminders to complete the necessary CE as licensees approach the end of the first year of their cycle, with the goal of reducing the number of "20/12" citations. Staff will work with IT staff to automate this process, using the email addresses provided by licensees in CBA Connect.

LISTSERV Email Platform/E-News

The CBA will further implement its new LISTSERV email platform in 2025 to create emails with CBA-related design elements for stakeholders and will also revamp the E-News subscription program which delivers targeting messaging to those who have registered for a particular email group.

The CBA will work with DCA on an enhanced LISTSERV feature which could provide tracking data such as the email open rate and other useful information.

UPDATE Publication

The CBA will explore the possibility of expanding *UPDATE* publication to quarterly in 2025. Bringing all design and layout responsibilities internal instead of with DCA has reduced the overall production time per issue, and staff will take this fact into consideration as it prepares this year's schedule.

Outreach Events for Consumers, Applicants, and Licensees

Interacting with the CBA in person at events creates an important bond with the stakeholder that cannot be easily attained in other ways.

These events provide the CBA a valuable opportunity to connect and form relationships with all its audiences. Some events the CBA will participate in

may be planned by schools or other entities, while some will be unique events created by the CBA. CalCPA is an important partner for outreach, and the CBA will continue to participate in events sponsored by the organization as appropriate.

Types of events staff will look to participate in or create this year include, but are not limited to:

- Presentations at Universities and Colleges
- Career Fairs for High Schools or Middle Schools
- Community Resource Fairs
- Speaking Engagements for CBA Members at Conferences
- Virtual Presentations

Outreach events will also be created in conjunction with the September 2025 CBA meeting to be held on a university campus.

Staff attending in-person outreach events will begin offering attendees the opportunity to provide their email address if they would like to stay informed about topics relative to them or the event. This way the CBA can send follow-up information as needed and can add these addresses to the appropriate E-News database. Starting this year, the CBA will ask attendees to fill out a post-event survey to capture their feedback about the event.

Educational Institution Partnerships

In 2025, the CBA plans to strengthen and expand its partnerships with educational institutions across California, with the goals of connecting with an increasing number of students, and having faculty to provide input and be a sounding board as the CBA prepares regulations to go along with the potential licensure changes should the legislative proposals pass.

The CBA will work closely with faculty at California State and University of California campuses, and California Community Colleges to align messaging encouraging students to choose accounting as their career. Faculty can be a valuable ally to the CBA in ensuring students are aware of the resources available to them on the CBA website. These partnerships will only help to funnel more students into the Pipeline for new talent in the accounting profession.

Social Media Engagement

The CBA maintains accounts on the social media platforms LinkedIn, X, Facebook, Instagram, and YouTube. Social media provides a direct, instantaneous avenue to reach stakeholders. The CBA posts a wide variety of

information of interest to stakeholders regarding licensure requirements, license renewal, CBA meetings, consumer protection, and much more. When multimedia elements are completed such as videos or podcast episodes, or the latest *UPDATE* newsletter, they are announced on CBA social media.

New in 2025, the CBA will begin to hold live, interactive sessions on social media on an occasional basis. Some of these sessions could involve a question-and-answer time for applicants, transcript review opportunities with licensing staff, or making an announcement (perhaps an update about progress with the CBA legislative proposals). Going live on social media is the most instantaneous and direct way to disseminate information to stakeholders, so staff will conduct some of these sessions and determine what the response is, and if some offerings are more popular than others.

More evergreen graphics will be created to accompany certain posts which generally increases the engagement compared to a post with only text.

The CBA uses social media platforms as another way to provide excellent customer service by responding to consumer inquiries via direct message in a timely and thorough manner.

Digital-Based Outreach

The CBA will continue to produce high-quality resources in the multimedia space in 2025. Videos will be created to both inform and entertain stakeholders about a variety of CBA functions, requirements, and events. Episodes of the “Accounting for California” Podcast will take a deeper dive into topics relevant to stakeholders, with podcasts generally accepted to have a longer runtime than videos.

An increased focus will be placed on brief personal testimonials from CBA and committee members on why they chose to become a CPA, or from students on why they are choosing to pursue an accounting major and ultimately their CPA license. These short videos can be featured on social media and the CBA website.

Website Updates

The website continues to be the CBA’s primary resource to convey information and services to its stakeholders. New pages are created as needed, but updates to better organize information on existing pages are constantly happening as well.

As mentioned in the Digital-Based Outreach section, short videos will be created with current and aspiring CPAs telling their story about how they

decided upon accounting as a career. These videos will be featured on a new webpage to be created where the accounting curious can go to be inspired by those who went before them.

A higher reliance will be placed on analytical tools to identify which elements of the website are the most highly used, and which are not. This information will help to determine which aspects of the website may need more attention than others.

Growing Audience Diversity

Increasing the diversity of CBA messaging is important for many reasons, but two in particular. The first reason is for the messaging to reach a broader audience of California stakeholders, many of whom are more comfortable in a language other than English. The second is to promote the accounting profession as a viable career choice to those from a variety of backgrounds, helping to ensure the California CPA licensee population is representative of the state's demographics.

Staff will take this into consideration as it plans the articles for each issue of the *UPDATE* newsletter. Additionally, the CBA will continue its practice of translating certain resources such as News Releases and videos into other languages. Social media posts can also be created in languages other than English. DCA provides tools to assist its boards with language translation needs. Staff has also identified which CBA and committee members are fluent in other languages to assist with translating some of the more technically accounting-related terminology if needed.

Meetings with Legislators and Legislative Staff

To effectively work in collaboration with members of the Assembly and Senate, CBA officers and staff leadership may engage in virtual and in-person meetings with elected officials to provide information on the role of the CBA, the value it plays in consumer protection, and share contact information and resources that can assist their constituents, as needed.