

125 YEARS



**CALIFORNIA BOARD OF
ACCOUNTANCY**

PROTECTING CONSUMERS SINCE 1901

OUTREACH PLAN

2026

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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 2026 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.

Strategic Goals

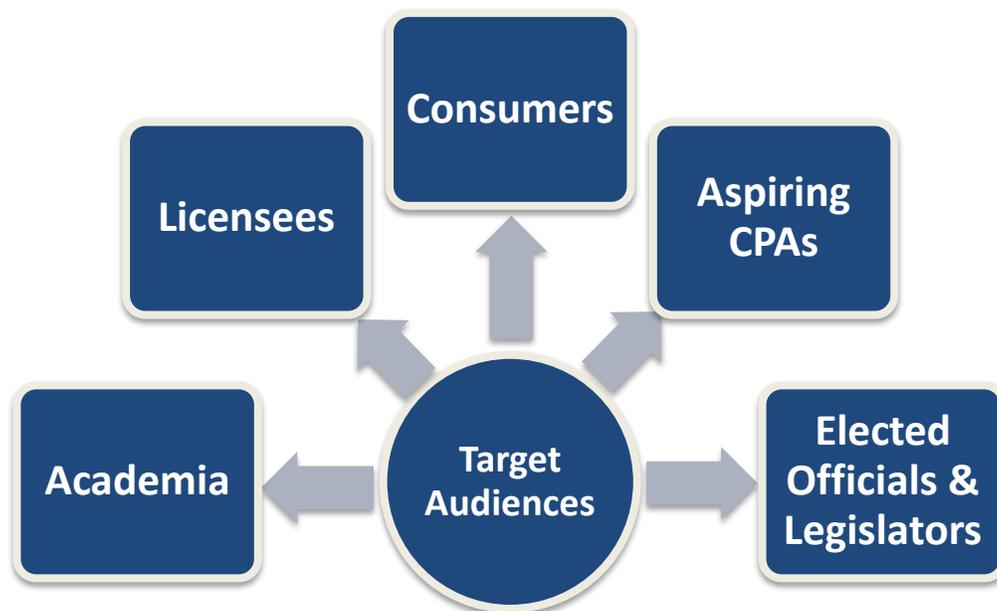
The following strategic goals make up the framework of the CBA's outreach mission, which is designed to align with the [2025-29 CBA Strategic Plan](#):

- 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 and accounting services, and deter unlicensed activity.
- 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 Consumers 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.
 - Licensees keep their professional knowledge base up to date through continuing education and completion of peer review, if subject.
- Financial Literacy
 - Personal Finance content and resources.
 - How to recognize and prevent elder financial abuse.
 - Scams to be aware of.

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 experiences regular and 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 is an important opportunity for the CBA to foster the beginning of a potentially life-long relationship with the individual.

The CBA also wants to help 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 Aspiring CPAs 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 upcoming licensure requirement changes due to Assembly Bill (AB) 1175.
 - Understanding the timeline of the phasing in of the new requirements and phasing out of the current requirements.

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 Licensees may include:

- Understanding of the License Renewal process.
 - CBA Connect
 - How to create an account.
 - CE requirements
 - 20/12 requirement
 - Regulatory Review course
 - Peer Review requirement
- Understanding of the Enforcement process.
 - Knowledge of due process rights.
 - How to respond to complaint inquiries.
 - Probation terms, if subject.
- Understanding of Business-Related Aspects.
 - Responsibilities and duties to clients.
 - Knowledge of the Mobility program.
 - Awareness of upcoming changes to mobility with AB 1175.
 - Knowledge of CBA registration requirements and other entity filings.
- Opportunities to serve on the CBA or one of its advisory committees.

Academia

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 Academia may include:

- Understanding of the requirements and process to obtain a CPA license.
 - Awareness of resources available on the CBA website.
- Knowledge of upcoming educational requirement changes for licensure due to AB 1175.
 - Ability to have the CBA “recognize” their institution's degree or certificate.
- 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 (which will be transitioning to the Business and Consumer Services Agency later this year); 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 Elected Officials and Legislators 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, accounting firm partners and hiring/recruiting managers, 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, especially its Campus Tour initiative in the fall of 2025, it has developed relationships with faculty and administration at many schools. Maintaining these relationships and developing new ones among educational institutions directly supports CBA outreach efforts with Aspiring CPAs and will continue in 2026.

Also this year, the CBA will be implementing the processes by which a university applies to have its degree(s) "recognized" by the CBA and a community college/extended studies program applies to have its certificate(s) "recognized" by the CBA. Making sure these institutions are

aware of the program and promoting the benefits of it to their school will be an important facet of CBA outreach in 2026.

Media

The media landscape has changed dramatically over the last decade. “New media” sources such as social media, blogs, and other internet-based platforms are often now relied on more heavily than “traditional media” outlets like television, radio, and print, especially with younger audiences. 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) and California media outlets (traditional media) can 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, both inside and outside of state government, creates an opportunity for collaboration and expanding the CBA’s reach to a broader audience.

A current example of an outside 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.

The CBA has also collaborated with other state government agencies which share a similar mission, such as the California Privacy Protection Agency, and other boards and bureaus within DCA, and will continue to leverage resources these agencies may have developed if they fit with CBA messaging.

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
- QR Codes
- Partnerships
- Other state and federal agencies

2026 Priorities

To reach the CBA's identified target audiences in 2026, 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:

Outreach Events with Consumers, Applicants, and Licensees **(Strategic Plan Objectives 4.1, 4.2, 4.3, 4.4, 4.7)**

Interacting with the CBA in person at events creates an important bond with the stakeholder that cannot be easily attained in other ways. Outreach events provide a valuable opportunity to form these relationships, and the CBA will create unique events or participate in events planned by schools or other entities to connect with all aspects of its audience.

Consumers

The CBA will increase its efforts to take part in consumer-focused outreach in 2026. A wide variety of events fall into this category. The CBA had worthwhile interactions with elderly consumers and their families at the senior fairs it participated in last year, and aims to return to the same events this year and identify similar ones to expand its presence with. On the opposite side of the age spectrum, high schools and middle schools host career fairs, which are an excellent opportunity for the CBA to raise awareness of the CPA profession and the benefits of a career in accounting to younger students. Legislators and other civic leaders often hold community resource fairs that the CBA can attend to connect with their constituents.

Applicants

The 2025-26 CBA Campus Tour will continue in spring 2026, following the successful fall 2025 leg. Tour events are scheduled for a number of universities and community colleges/extended studies programs, with both on-campus and virtual events planned. These will include collaboration with CalCPA (as their schedule allows), who will attend Campus Tour dates and give a brief presentation about their organization. Even after the Campus Tour-branded events conclude staff will continue to schedule events to inform more applicants about the upcoming licensure requirement changes.

Licensees

Stakeholders in this category include CPAs, accounting firms, and CPA faculty members. We will provide regular communications to these groups, including presentations for academic faculty and advisors so they can be confident sharing information about the upcoming licensure requirement changes with their students. A virtual webinar for licensees will be produced featuring a panel discussion about the mobility changes contained in AB 1175.

The CBA will also focus on sharing other current topics relevant to the licensee population, such as the CE modernization project in addition to common reminders regarding license renewal and practice.

Assembly Bill 1175/New Licensure Requirements Outreach **(Strategic Plan Objectives 4.3, 4.4)**

As AB 1175 takes effect, one of the CBA's key priorities is to ensure that all stakeholders affected by the legislative changes are aware of the scope of the changes, the timeline which these changes will be implemented, and the effects the changes may have on them. This includes aspiring CPAs, Educators and academic advisors, accounting firms, and current licensees.

A new webpage will be developed focusing on the licensure requirement changes, updates on the progress of the related regulations, and implementation timeline. This page will complement the AB 1175 webpage created in 2025 which focused on the development of the legislative proposal and the bill's progress as it worked its way through the legislative process. The 2025-26 CBA Campus Tour will continue to be a significant part of the outreach to universities and community colleges across California. Social media will be another important source of updates for stakeholders as the January 1, 2027 effective date draws closer.

Educational Institution Partnerships **(Strategic Plan Objective 4.3)**

In 2026, the CBA plans to continue strengthening and expanding its partnerships with educational institutions across California, aligning with Objective 4.3 of the 2025-29 CBA Strategic Plan. The CBA Campus Tour is a significant part of this initiative, connecting the CBA directly with faculty members and student organizations across dozens of campuses to ensure they are aware of AB 1175 and its significant positive impact.

Community colleges and extended studies programs will receive an additional focus over the coming year with the upcoming launch of CBA-recognized certificate programs. Staff will hold a webinar with leaders from these institutions to hear about how to begin a recognized certificate program at their school.

The CBA will also explore regular communications/emails with educational institution partners to further develop and maintain relationships, with the goal of ensuring faculty have a solid understanding of CBA messaging and are encouraging students to choose accounting as their career. Faculty can be a valuable ally to the CBA in providing students proper advice about becoming a CPA and making them aware of the resources available to them on the CBA

website. These partnerships will only help to funnel more students into the pipeline as the next generation of accounting professionals.

Social Media Engagement **(Strategic Plan Objectives 4.1, 4.2, 4.7)**

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

While the current social media strategy is already resulting in increased engagement and follower counts, the CBA plans to rely more heavily on analytics to inform its decisions and drive further interactions in 2026.

Website Updates **(Strategic Plan Objectives 4.1, 4.4, 4.5)**

The website continues to be the CBA's primary resource to convey information and services to its stakeholders. It has been three years since the last major refreshing of the website in the fall of 2022, so this year staff will embark on a project to redesign the website to ensure it meets the needs of all stakeholders and incorporates opportunities to increase interactive functions.

Accounting Firm Outreach **(Strategic Plan Objective 4.4)**

The CBA will look to increase its outreach to firms over the coming year as they begin to shift their hiring and recruiting practices to incorporate the new licensure requirements. This topic is one that has been brought up by students and faculty members at outreach events as a potential point of concern, and it is important that hiring firms are fully aware of the timeline and implementation of these new requirements to ensure a smooth transition.

Growing Audience Diversity **(Strategic Plan Objectives 4.2, 4.6)**

Increasing the diversity of CBA messaging is important for many reasons as it strives for the messaging to reach a broader audience of California stakeholders, many of whom are more comfortable in a language other than English. Another reason is to promote the accounting profession as a viable

career choice to those from a variety of backgrounds, helping to shape the California CPA licensee population as representative of the state's demographics. Staff will take this into consideration as it plans social media posts and 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 be created in languages other than English. DCA provides tools to assist boards with language translation needs, as mentioned in its Language Action Plan.