



## California Society of Tax Consultants

### Executive Director Report

Jenn Baker

November 16, 2020

#### **2020/2021 Board of Directors Meeting Schedule:** Need to secure 2021 dates

January 11, 2021 – Live – 9 AM to 2 PM

May Board Meeting (Virtual One Day Meeting) – Date TBD by new Board

July Board Meeting (Live Two-Day Meeting) – Date TBD by new Board

**Please keep these dates in mind when planning the 2020/2021 schedule.**

#### **Zoom Chapter Training Meeting**

On November 12, I conducted a Zoom training and invited all Chapter Leaders to join. I reviewed all the steps to getting a meeting scheduled, what to do during the meeting, post meeting information, and virtual meeting resources. The training was recorded, and I have emailed the recording, the PowerPoint, the need virtual meeting resources page, and helpful zoom links to the Chapter Leaders. My hopes is that this will make Chapter feel more comfortable hosting their virtual meetings and will encourage Chapters who are not meeting virtually to give it a try.

Link to new virtual meeting resources webpage: <https://cstc.memberclicks.net/virtual-chapter-meeting-resources>

#### **CTEC Annual Review / 60 Hour QE Course:**

I received the email from CTEC on November 4, 2020 that our 2019 CE and QE courses that were under the Periodic Review have been approved. I am talking with David Eastis for future options to offer the 60 hour course.

**COVID IN OFFICE HOURS:** Due to COVID 19, we have one staff member going to the office once a week. Please expect a short delay in processing membership applications and renewals

#### **My goals for 2020:**

- Improve communication regarding CSTC member benefits
- Offer more member benefits

- Increase CSTC membership to 900 members by the end of the year
- Continue advancing the CSTC committees and improve volunteer engagement
- Have a successful and profitable Summer Symposium and Fall Forum
- Offer more exhibitors at CSTC events
- Improve on online advertising
- Offer online webinars to members and non-members to increase revenue
- Be more accessible to Chapter Leaders for website training
- Improve communications from the IRS and CTEC to membership
- Improve relationship with NSA – get our events on their calendar, etc.
- Continue the implementation the Carver Policy of Governance
- Train all Chapters so they are able to hold both virtual and live education events

Respectfully submitted

A handwritten signature in cursive script that reads "Jennifer Baker". The ink is a light grey color.

Jennifer Baker  
CSTC Executive Director