



## ***Job Responsibilities***

### **President**

- Presides at Board meetings and programs
- Keeps membership informed about National AWSCPA activities through reports at meetings, newsletters, email, etc.
- Facilitates setting of affiliate goals
- Ensure efficient affiliate operations
- Reports to Regional Director
- Delegates assignments as needed
- Assists other board members and committees as needed
- Acts as one of the primary representatives of the Affiliate to outside organizations
- Has signatory authority for checking account
- Identifies members for future board positions
- Writes President's Message article for newsletter
- Maintains copy of official Affiliate documents

### **President Elect**

- Fills in for president, as necessary
- Assists in the performance of special projects and responsibilities not filled by any specific board member
- Holds signatory authority for checking account
- Acts as one of the primary representatives of the Affiliate to outside organizations
- Ensures that post office keys are distributed to appropriate Board members and that mail has been picked up at least twice a month
- Identifies members for future board positions
- Coordinate and plans annual dinner, including selecting speaker, choosing location and menu, sending invitations, preparing programs and nametags and all other arrangements (with assistance from a Program Committee)
- Obtains corporate sponsors for tables for annual dinner

- Completes the AWSCPA Affiliate Award applications and submits to National office by deadline

### **Past President**

- Serves on Nominating Committee
- Assists other board members and committees as needed
- Identifies members for future board positions

### **Secretary**

- Prepares Board meeting agenda in advance of the meeting
- Keeps minutes of each BOD meeting
- Distributes minutes of each BOD meeting within one week after each board meeting
- Sends approved minutes to National for record keeping
- Maintains official Affiliate documents
- Maintains a list of rules approved by the Board
- Maintains a list of ideas for next year
- Maintains a list of job responsibilities, updated annually with the President
- Maintains and distributes BOD address list
- Maintains calendar with Affiliate and National events/deadlines

### **Treasurer**

- Reviews all work performed by Assistant Treasurer
- Makes disbursements for all necessary expenses
- Coordinates the deposits of all receipts to checking account on a timely basis
- Maintains accounting records
- Prepares monthly bank reconciliations
- Prepares quarterly financial statements (balance sheet & income statement) & cash flow projections
- Responsible for invoicing and accounts receivable collection.
- Prepares all tax-related forms and correspondence including NJ Annual Report
- Corresponds with bank
- Holds signatory authority for checking account

### **Assistant Treasurer**

- Prepares annual budget
- Works with Member Services Recruitment Coordinator to reconcile National membership listings and dues payments to Affiliate records
- Works with Program Director to reconcile program receipts and expenses.
- Assists Treasurer in making deposits and disbursements
- Checks PO box on a regular basis (biweekly, if possible)
- Holds signatory authority for checking account

### **National Liaison**

- Assist affiliate with set up
- Keeps affiliate informed about National AWSCPA activities

### **Member Services Director**

- Liaise with accounting firms and other organizations to gain visibility and attract members and new participants for programs
- Contacts new participants after each meeting to get feedback/interest level
- Contacts members who have not attended meetings to obtain feedback
- Contacts members who have not renewed their membership to obtain feedback
- Contacts members for program ideas and other surveys for ideas and member needs
- Writes Member Corner section of newsletter, including new members
- Supervises Member Services Recruitment Coordinator and Communications Coordinator

### **Member Services Recruitment Coordinator**

- Assists Member Services Director
- Corresponds with National to reconcile membership roster on a monthly basis.
- Provides information to Assistant Treasurer to reconcile receipts of membership dues
- Helps cover the sign in/membership table at events
- Prepares follow up letter to participants after event and ensures distribution within one week after event

### **Director of Student Relations**

- Oversees Student Recruiters
- Coordinates programs with local colleges and universities
- Determines subject matter with student organization/college and speakers
- Contacts alumni or other members for participation in student presentations
- Prepares handouts for student presentations and AWSCPA information to provide to students and gives to presenters prior to the presentation
- Provides presenters with details for presentation (time, place, contact person & contact phone #)
- Provides membership and other information to student recruiters to distribute on campus (ie, scholarship and CPA review course information)
- Identifies potential student recruiters and attempts to get coverage at all area schools

### **Student Recruiters**

- Liaise with colleges/universities and NJ Affiliate to publicize events/programs

- Provide membership and other information to students

### **Scholarship Director**

- Determines how many scholarships will be awarded based on amount approved by the Board
- Establishes criteria/qualifications for awards and presents to Board
- Applies to National for matching funds (April)
- Corresponds with colleges about prospective candidates and distributes applications
- Coordinates press release and postings for scholarship information in various publications and websites.
- Provides scholarship applications received to the Board to select winners
- Sends thank you letters to all applicants
- Invites scholarship winners to attend annual dinner and informs President Elect
- Arranges for certificates and payments of awards
- Maintains list of former scholarship winners
- Presents scholarship award to recipient at annual dinner

### **Marketing and Publicity Director**

- Press Release announcing events
- Maintain list of newspapers and other marketing outlets to release press releases to.
- Maintain list of Human Resource contacts or other accounting department heads at area firms
- Obtain and maintain list of College contacts -Women professors etc to inform of events
- Maintain list of student contacts
- Maintain list of sponsors-past and potential.
- Reach out to other professional women's organization for co-events, newsletters, etc.

### **Director of Publications**

- Oversees Newsletter Coordinator
- Oversees production of quarterly newsletter, including:
  - Setting production timeline
  - Researching ideas for newsletter
  - Selecting advertisements for newsletter
  - Collecting articles from authors
  - Proof reading newsletter
- Interviews subject matter experts
- Attends industry events for newsletter coverage
- Writes articles
- Takes pictures at events for newsletter

### **Newsletter Coordinator**

- Designs layout with assistance from Director of Publications
- Drafts newsletter and makes any necessary changes

### **Communications or Website Coordinator**

- Monitors Affiliate email box (check a few times a week-more often when event is pending)
- Email invitations, reminders, announcements and other information to mailing list
- Control event RSVP's for headcount
- Sends new members a welcome letter and survey and forwards completed surveys to President
- Periodically reviews website, [www.awscpa.org/nj](http://www.awscpa.org/nj), to determine if changes are necessary. Contacts Don at National to update website for changes to website page, including: board members, events, job opportunities, scholarship and newsletter.
- Helps cover the sign in/membership table at events
- Helps out with special projects as needed

### **Constant Contact Coordinator (or website/communications)**

- Sets up original invite through constant contact utilizing the finalized invitation or online registration documents.
- Prepares weekly email reminders for each event. If there is more than one event, one email is to be distributed containing details for each upcoming event.
- Updates Constant Contact "General List" with new affiliate members, contacts and event participants that are not already included in the mailing. Must utilize the roster provided by Don at National, event registration listing and suggestions from other Board members.
- Emails Board members with applicable updates.
- Helps cover the sign-in table at events

### **Program Director**

- Creates agenda for and facilitates monthly program committee calls.
- Prepares minutes for the monthly program committee calls. When minutes are approved, they are then, emailed to the Board Secretary for affiliate records.
- Develops ideas for programs to increase membership.
- Maintains suggested list of speaker and topic ideas for future use.
- Develops tentative schedule of events to be approved by the Board.

- Seeks out sponsors for events.
- Assists in finding potential sponsors and speakers for events.
- Arranges for press coverage, when appropriate.
- Approves budgets for each event.
- Develops a time line for the responsibilities of each event.
- Works with the event coordinator in obtaining information on prospective hosts, speakers or contacts.
- Emails Board members for any program committee requests.
- Contributes to the quarterly newsletter in the form of articles of the events.
- Introduces speakers at events and gives AWSCPA-NJ info about board opportunities, upcoming events, introduces board members, etc.
- Oversees Program Coordinators

### **Event Coordinators**

- Develops budget for the event.
- Researches venues for events
- Makes calls to prospective hosts, speakers or contacts for each event to obtain availability, cost, timing, etc. and reports back to the program committee and/or Board.
- Confirms with prospective hosts, speakers or contacts the date, time and location for each event after the program committee and/or Board have agreed to the details of the event.
- Obtain contract from the venue which should be signed by the President. Deposit may need to be obtained from the Treasurer as well.
- Communicates agenda/time table to venue ahead of time to ensure food and beverages are served timely, tables are set up properly, AV is set up properly and necessary supplies are available (include in contract if possible)
- Follows up with host, speaker or contact 2 weeks prior to event (or as instructed by the location's contact). Obtains information on what the AWSCPA's responsibilities are for the event.
- Coordinates electronic equipment with venue (laptop/projector/extension cords/microphone), podium, registration tables, bowls/baskets on tables for business cards, etc., needed for event if applicable.
- Coordinates Goody bags/door prizes with the Gifts and Inventory Coordinator
- Obtains speaker bios

- Helps cover the sign-in table at events
- Sends thank you note to speaker (with fee, if applicable)
- Introduces speakers at events and gives AWSCPA-NJ info about board opportunities, upcoming events, introduces board members, etc.. when program director is not available
- Reviews evaluation forms from events for ideas and changes

### **Invitations and registration coordinators**

- Drafts “Save the date”, invitations, online registration form, flyers and/or brochures for each event. Sends out drafts to program committee and President for approval.
- Finalizes “Save the date”, invites, online registration form, flyers and/or brochures for each event after approval from program committee and President.
- Sends registration and flyer to Don and Tina at National ([tschneider@advmtconcepts.com](mailto:tschneider@advmtconcepts.com) and [dgaitten@advmtconcepts.com](mailto:dgaitten@advmtconcepts.com)). Once national puts the registration online, make sure the correct price, date, etc. are on the website. If the event has CPE credits, make sure it is indicated on the main page. Also test register to ensure the confirmation email received from National contains the correct information.
- “Save the date” emails/ flyers should be sent out within one week of final event approval. Coordinates with Constant Contact coordinator to get the email to our listing.
- Drafts should be completed 8 weeks before event and finalized 6 weeks before event.
- Obtains registration listing from Don or Tina one week prior to event or before the monthly program call. Obtains final registration listing the morning of the event, or day before if the event is in the morning.
- Sends Constant Contact Coordinator event information and directions to email to participants a few days prior to the event.

- Obtains the AWSCPA displays from National by requesting them from Tina for all applicable events and brings them to the event or coordinates for someone else to bring the displays.
- Helps cover the sign-in table at events

### **Gifts and inventory coordinator**

- Holds all inventory of goody bags items and keeps a record of the items on hand.
- Purchases items needed for specific event. Items should be purchased 6 weeks before event in order to ensure they are received in time.
- Works with the host and/or other program committee members to plan gifts/door prizes.
- Prepares gifts/goody bags/door prizes and brings them to the event (or coordinates with someone else to have the goodies at the event).
- At times, may need to coordinate with other members that attend outside events and may need give-aways. For example, Montclair State Accounting Reception or William Paterson presentation to the accounting club.
- Orders items from National (Tina or Don) as needed. For example, AWSCPA membership packets or items off the website that we pay for.
- Helps cover the sign-in table at events

### **CPE Coordinator - Annette Tolentino**

- Draft CPE promotional material to be included in event invitations
- Prepares all documents necessary to obtain CPE for each event prior to each event.
- Prepares the attendance sheet for each event
- Prepares name tags for the participants. Names will be provided by the Invitations and Registration coordinator.

- Helps cover the sign-in table at events
- Forwards evaluation forms to the Program Director for review.
- Reviews required CPE documentation and submits to National for CPE Certificates when applicable.
- Ensures that the CPE certificates are distributed to the participants in a timely manner.
- Helps cover the sign-in table at events

### **Golf Outing Chair**

- Prepare budget for golf outing
- Research & reserve venue
- Seek out sponsors for event
- Prepare sponsorship flyer and program
- Seek out goody bag items and collate goody bags
- Determine pricing and format of event
- Coordinate all necessary items with golf club and restaurant (timing, format, food and beverages, registration table, etc...)
- Coordinate volunteers for registration/sign-in table/questions
- Give welcoming address to participants and instructions throughout the day as well as announce winners/prizes

### **Community Outreach Director**

- Identifies charitable organizations that provide services to women (mentoring, professional development, clothing, etc.)
- Identifies opportunities to partner with these organizations
- Identifies community events that members can participate in and coordinates AWSCPA-NJ participation
- Writes articles for newsletter highlighting these organizations and events

### **Career Center Directors**

- Liaise with recruiting firms and other firms/companies to determine career opportunities available
- Maintains career center section of website
  - Posts articles and tips from recruiting firms/HR departments
  - Posts job opportunities and removes them when positions are filled
- Writes career center article for newsletter including career/job search tips and job opportunities