

**EXECUTIVE SEARCH**



**PRESIDENT & CEO**

SEARCH CONDUCTED BY

**STERLING | MARTIN**  
a s s o c i a t e s

## THE OPPORTUNITY

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The California Society of CPAs (CalCPA or Society) is conducting a search for its next President & Chief Executive Officer (CEO). Founded in 1909, CalCPA is the largest statewide professional association of certified public accountants in the United States.

The President & CEO will report to Council, the Board of Directors of the Society, as well as the Board of Trustees of the CalCPA Education Foundation. In addition to having oversight for administrative, financial, and operational functions, they will collaborate with both Boards to revise the strategic plan to reflect changes in the professional landscape. The President & CEO will play a lead role in raising the visibility of CalCPA and the accounting profession, as well as in advocating for issues that impact the profession and CalCPA membership. This position can be based at the organization's headquarters in San Francisco or work virtually from other locations in California. Regular travel is required.

## CalCPA: AN OVERVIEW

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CalCPA's mission is to increase the value and promote the integrity of the CPA profession; contribute to the success of its members; and strengthen client, employer, public and government trust in CalCPA member advice, work products, and opinions. The Society operates two 501(c)(3) nonprofit corporations, the CalCPA Education Foundation (Education Foundation) and the CalCPA Institute. Together, the Society and its affiliates have an annual budget of approximately \$25.6 million and a staff of about 85.

CalCPA's members have access to a wide range of training, professional development, and leadership opportunities through the Society. CalCPA advocates for its members, monitoring new legislation that could impact the profession and encouraging grassroots lobbying efforts at the local level.

CalCPA is led by a Council, that is the Board of Directors under state law, which is responsible for policy and strategy. The Council delegates implementation and oversight to a volunteer steering committee known as the Board of Directors, which also serves as the Board of Directors of the CalCPA Institute. The CalCPA Education Foundation is led by a volunteer Board of Trustees. The Society's work is supported by its 14 local chapters, as well as its statewide committees and sections.

## THE PRESIDENT & CEO ROLE

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The President & CEO is responsible, in partnership with Council, the Board of Directors, and the Board of Trustees, for the success of CalCPA. Together, the Council, the Boards, and the President & CEO

ensure CalCPA's value to the members, the accomplishment of CalCPA's mission and vision, and the accountability of CalCPA to its diverse constituents.

The Boards delegate responsibility for management and day-to-day operations to the President & CEO, and the President & CEO has the authority to carry out these responsibilities, in accordance with the direction and policies established by the Boards.

## **Strategic Priorities for the President & CEO**

The President & CEO is tasked with addressing the following priorities:

### **Promote the Profession**

- Enhance the visibility of CalCPA and the accounting profession.
- Maintain CalCPA's reputation as a well-respected leader in business, education, and government.
- Advocate for issues that impact the profession and its members.
- Maintain an effective relationship with the American Institute of CPAs and other state CPA societies.

### **Contribute to the Success of Members**

- Clarify CalCPA's core values and, together with the Boards, revise and implement the strategic plan to reflect the changing professional landscape.
- Navigate changing membership needs and value proposition.
- Cultivate the pipeline of future CPAs, financial professionals, and CPA members.
- Identify and secure new and continued funding sources and revenue streams for CalCPA.
- Manage the CalCPA Education Foundation as the leading provider of continuing professional education for CPAs and financial professionals by providing quality, innovative, and relevant continuing professional education (CPE) and value-driven education to all members, partners, and customers.
- Provide value and engagement at every career stage.
- Explore, develop, and maximize partnerships that are in CalCPA's best interest and support its mission.

### **Strengthen Trust**

- Advocate for diversity, equity, and inclusion, and be respectful of a wide range of cultures, belief systems, and experiences.
- Establish and maintain trusted relationships with state and national constituents.
- Promote working relationships and collaboration with all CalCPA chapters and offices.

## **Essential Duties and Responsibilities**

### **Governance and Board Relations**

- Work closely with the Council, Board of Directors, and Board of Trustees to develop, oversee, monitor, and fulfill CalCPA's mission, strategic issues, and planning.
- Make recommendations and implement decisions related to CalCPA's strategic priorities.

- Ensure CalCPA's compliance with professional standards and federal and state regulations.
- Inform the Council, the Board of Directors, the Board of Trustees, and their committees about trends, issues, and activities in order to facilitate policymaking. Recommend policy positions.

### **Organizational and Personnel Management**

- Effectively and efficiently manage the operations of CalCPA.
- Manage, at a high level and through delegation, CalCPA's relationships and use of vendors.
- Delegate responsibilities where appropriate to executive team members.
- Maintain fair and equitable compensation levels.
- Adhere to all federal and state laws, regulations, and other rules concerning personnel management.
- Manage and empower employees to ensure all programs, services, and strategic priorities are implemented efficiently, effectively, and professionally.
- Hire, train, develop, and evaluate executive team members. Manage and lead succession planning.

### **Public Relations**

- Maintain an effective relationship with members and other organizations (governmental, public, and private).
- Ensure CalCPA is positively positioned and effectively represented in the local and national communities, as well as within appropriate professional circles.
- Act as CalCPA's spokesperson with the public and media, in conformity with Board policies.
- Act as the "face of CalCPA" for client and public relations purposes, and in meetings with other organizations and their leadership.
- Facilitate the integration of CalCPA into the fabric of the community by using effective and innovative marketing and communication techniques.

### **Member Relations**

- Advocate, within the public and private sectors, for issues relevant to CalCPA, its services, and constituents.
- Create and maintain active dialogue with members, partners, volunteers, and donors in order to expand services and involvement. Ensure member awareness of CalCPA's response to community needs.
- Ensure proper communication and representation of CalCPA to members, partners, volunteers, and donors.
- Initiate, develop, and maintain cooperative relationships with key constituents.

### **Advocacy**

- Engage appropriate resources to advocate on behalf of CalCPA's mission with local and national organizations, as well as governmental bodies.
- Apprise the Council and the Boards of legislative and regulatory activity that affects CalCPA's mission and its members.

- Work with legislators, regulatory agencies, volunteers, and representatives of the not-for-profit sector and accounting profession to promote legislative and regulatory policies that advocate for and address the issues of CalCPA's membership.

## CANDIDATE PROFILE

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### Performance Criteria

The President & CEO will be committed to the mission of CalCPA and be knowledgeable in all aspects of nonprofit management. As President & CEO, this individual will demonstrate critical competencies in four broad categories: commitment to results, business savvy, change leadership, and motivation.

- **Commitment to results:** The President & CEO is a systems thinker who is customer-focused and goal-driven. They identify relevant information and help transform it into individual and organizational knowledge and learning. The President & CEO is action-oriented and innovative. They translate broad goals into achievable steps. They anticipate and solve problems and take advantage of opportunities.
- **Business savvy:** The President & CEO possesses extensive knowledge of and experience in management and administration. They demonstrate an ability to integrate and coordinate diverse areas of management.
- **Change leadership:** The President & CEO possesses the skills and implements the functions of a proven effective leader. They embrace CalCPA's values, mission, and vision. They consistently display integrity and model behavior, develop people, and build teams. They deal effectively with demanding situations and design and implement solutions.
- **Motivation:** The President & CEO manages continuity, change, and transition. They know how to influence and enable others. They address the impact of attitude and action on CalCPA and its participants.

### Professional Qualifications

In order to allow the President & CEO to fulfill the responsibilities of—and be an effective leader serving in the best interest of—CalCPA, they will possess the following professional knowledge, skills, and abilities:

#### Knowledge

- Knowledge of membership building strategies.
- Managing a business and volunteer relationships while growing revenues in a membership organization facing challenges as our market and environment changes.
- Excellent business acumen and understanding of legislative and advocacy process and implications.
- Strong understanding of technology, including current and future implications to members and users.

- A keen sense of the business of continuing professional education, in particular the competitive threats posed by new market entrants. The market awareness and business savvy to continue to position the CalCPA Education Foundation as a highly branded, strategically differentiated provider.

## Skills

- Strong leadership skills and appropriate support to the Council and Boards, members, and staff.
- Skilled at motivating Board members, staff, and volunteers.
- Adept at identifying issues and opportunities and the related assessment of the impact to CalCPA and its Council and Boards.
- Finance skills, including the ability to read, analyze, and interpret business documents, as well as manage contracts.

## Abilities

- Ability to communicate effectively with others at all levels, in oral and written form.
- Ability to identify priorities and switch gears quickly and effectively, while keeping Boards and staff informed, involved, and moving forward.
- Ability to convey the vision and strategy to staff; ability to help them understand changes and align their activities with those changes.
- Ability to connect with a diverse group of stakeholders and build long-lasting relationships.

## Personal Characteristics

In addition to the qualities listed above, the President & CEO must possess these characteristics:

- Strategic and visionary; takes an innovative approach to managing resources and opportunities.
- Passion for and long-term commitment to CalCPA's mission.
- Engaged in the long-term success of the profession.
- Dependable, emotionally intelligent, and self-aware.
- Open-minded and inclusive, seeking and considering ideas and suggestions from others before making decisions; values process as well as outcomes.
- Manages change using a transparent, creative approach that boosts staff morale and enhances programs.
- Personable, approachable, and available to staff, Board, members, and other stakeholders.
- Positive attitude and inspirational personality to navigate uncertainty and rally the team.
- High tolerance for ambiguity in a rapidly changing environment; resilient and adaptable.
- Demonstrates commitment to continued professional growth and development.
- Ability to handle difficult and challenging issues in an effective manner.

## Additional Qualifications

- Extensive work experience in a senior management position of a similarly sized trade association, nonprofit, or academic organization.
- A Bachelor's degree is required; advanced degree preferred.
- Must reside in California.

- Ability to travel throughout California and the United States is required for the sake of building and sustaining member and partner relationships, developing resources, and representing CalCPA and its members.
- CPA or financial background encouraged.

## COMPENSATION

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A competitive compensation package will be offered to attract an outstanding candidate.

## TO APPLY

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To apply, please send a cover letter and current résumé (Microsoft Word® format preferred) to [calcpa@smartinsearch.com](mailto:calcpa@smartinsearch.com). The cover letter should outline how your experience fits the requirements of the position as this will be an important factor in considering your candidacy.

*CalCPA is an equal opportunity / affirmative action employer committed to inclusion and cultural diversity in the workplace. Employment selection and related decisions are made without regard to sex, race, color, age, disability, religion, national origin, sexual preference, genetic information, or any other protected class.*

## ADDITIONAL INFORMATION

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For more information, contact:

**Sterling Martin Associates**

1025 Connecticut Avenue  
Suite 1000  
Washington, DC 20036

**David S. Martin, Managing Partner**

[calcpa@smartinsearch.com](mailto:calcpa@smartinsearch.com)  
(202) 257-1627

**Sharon Beatty, Senior Executive Recruiter**

[calcpa@smartinsearch.com](mailto:calcpa@smartinsearch.com)  
(971) 322-7658

**Susan Scott, Senior Executive Recruiter**

[calcpa@smartinsearch.com](mailto:calcpa@smartinsearch.com)  
(571) 338-4853