



Executive  
Director/

Chief Executive  
Officer

## Position Profile

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Authored by:

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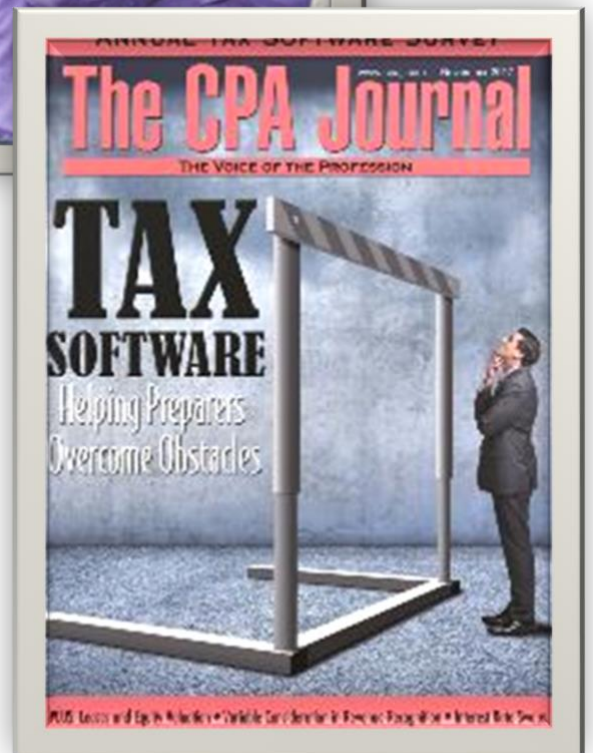
CEO and Managing Partner

Sterling Martin Associates

Erica Rimlinger

Director of Communications

Sterling Martin Associates



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

## The Opportunity

The New York State Society of CPAs (NYSSCPA) is conducting a search for its next Executive Director/Chief Executive Officer (ED/CEO). Founded in 1897, NYSSCPA is a 501(c)(6) membership association for certified public accountants (CPAs) and finance professionals in New York state, and aims to educate, connect, and grow the careers of its nearly 24,000 professional members.

NYSSCPA fulfills this commitment to its membership through in-person and online networking opportunities, professional education, and prominent industry publications such as *The CPA Journal*. With annual revenues of around \$10.3 million, and a 39-member governing Board of Directors, the organization's work is supported by 67 staff members and 15 local chapters throughout the state, as well as more than 60 committees covering a broad range of topics and areas.

NYSSCPA also runs the Foundation for Accounting Education, a 501(c)(3) organization that administers continuing professional education (CPE) for CPAs and finance professionals. FAE offers courses in accounting, auditing, taxation, industry-specific topics, ethics, and advisory services in multiple formats, including live and online courses, and full- and half-day conferences and seminars.

The ED/CEO is responsible for the success of both organizations, reporting to the Board of Directors (Board) of NYSSCPA. 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 ED/CEO will play a lead role in raising the visibility of NYSSCPA and the accounting profession, as well as in advocating for issues that impact the profession and NYSSCPA membership. The position is based at the organization's Wall Street headquarters in Manhattan. Regular travel is required.

## About NYSSCPA

NYSSCPA's mission is to educate, connect, and grow the membership within the CPA industry. A 501(c)(6) organization, NYSSCPA operates two 501(c)(3) nonprofit corporations, the Foundation for Accounting Education (FAE) and the Moynihan Scholarship Fund (MSF). Together, NYSSCPA and its affiliates have an annual budget of approximately \$10.3 million and a staff of about 67 members.

NYSSCPA's nearly 24,000 members have access to a wide range of training, professional development, and leadership opportunities. NYSSCPA advocates for its members, monitoring new legislation that could impact the profession and encouraging grassroots lobbying efforts at the local and state levels.

NYSSCPA is led by a 39-member Board of Directors, which is responsible for policy and strategy. It includes seven officers: a president and president-elect, four vice presidents, and a

secretary/treasurer who all serve a one-year term. Directors-at-large and directors as chapter representatives hold office for three years. The executive director serves as a non-voting member of the board.

The organization's work is supported by its 15 local chapters as well as more than 60 committees covering a broad range of topics and areas. NYSSCPA publishes a journal, *The CPA Journal*, as well as *NextGen Magazine*, *The Trusted Professional*, and the online *Tax Stringer*. NYSSCPA's extensive education offerings are available to members online and in-person.

## The ED/CEO Role

The ED/CEO is responsible, in partnership with the Board, for the success of NYSSCPA. Together, the Board and the ED/CEO ensure NYSSCPA's value to the members, the accomplishment of NYSSCPA's mission and vision, and the accountability of NYSSCPA to its diverse constituents.

The Board delegates responsibility for management and day-to-day operations to the ED/CEO, and the ED/CEO has the authority to carry out these responsibilities, in accordance with the direction and policies established by the Board.

### *Strategic Priorities for the ED/CEO*

The ED/CEO is tasked with addressing the following priorities:

#### **Promote the Profession and the Organization**

- Enhance the visibility of NYSSCPA and the accounting profession, especially in demographics identified in the strategic plan.
- Maintain NYSSCPA'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, other state CPA societies, National Association of State Boards of Accountancy (NASBA), the New York State Department of Education and professional affinity groups such as Ascend, the Association of Latino Professionals in Finance and Accounting (ALPFA), the International Society of Filipinos in Finance and Accounting (ISFFA), the National Association of Black Accountants Inc. (NABA) and the National Society of Black Certified Public Accountants, Inc. (NSBCPA).
- Oversee new membership development strategies.

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

- Clarify NYSSCPA's core values and, together with the Board, 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.
- Manage the FAE 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.
- Oversee the Moynihan Scholarship Fund and effective and impactful fundraising for the initiatives and scholarships of the MSF.
- Provide value and engagement for members at every career stage.
- Explore, develop, and maximize partnerships that are in NYSSCPA's best interest and support its mission.
- Identify and secure innovative revenue streams.

## **Be a Champion for Inclusion, Diversity, Equity, and Access**

- Advocate for inclusion, diversity, equity, and access, and be respectful of a wide range of cultures, belief systems, and experiences.
- Establish and maintain trusted relationships with all communities within state and national constituents.
- In collaboration with all NYSSCPA chapters and offices, create a strategic plan for the organization to reach inclusion, diversity, equity, and access goals.

## ***Essential Duties and Responsibilities***

### **Governance and Board Relations**

- Work closely with the Boards of the Society, FAE, MSF and PAC to develop, oversee, monitor, and fulfill NYSSCPA's mission, strategic issues, and planning.
- Make recommendations and implement decisions related to NYSSCPA's strategic priorities.
- Ensure NYSSCPA's compliance with professional standards and federal and state regulations.
- Inform the Board and 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 NYSSCPA.
- Manage, at a high level and through delegation, NYSSCPA'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 NYSSCPA is positively positioned and effectively represented in the local and national communities, as well as within appropriate professional circles.
- Act as NYSSCPA's spokesperson with the public and media, in conformity with Board policies.
- Act as the "face of NYSSCPA" for client and public relations purposes, and in meetings with other organizations and their leadership.
- Facilitate the integration of NYSSCPA 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 NYSSCPA, 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 NYSSCPA's response to community needs.
- Ensure proper communication and representation of NYSSCPA to members, partners, volunteers, and donors.
- Initiate, develop, and maintain cooperative relationships with key constituents.

## **Advocacy**

- Engage appropriate resources to advocate on behalf of NYSSCPA'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 NYSSCPA'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 NYSSCPA's membership.

## Candidate Profile

### *Professional Qualifications*

NYSSCPA's next leader will possess the following professional knowledge, skills, and abilities:

- Extensive work experience as an organizational leader in a senior management position.
- A Bachelor's degree is required; an advanced degree is strongly preferred.
- A CPA is desirable but not required.
- Certified Association Executive (CAE) certification is a plus.
- A track record of success building membership or growing revenues for an organization
- Knowledge and innovation with regard to continuing professional education (CPE) programs and delivery models.
- Commitment to diversity, equity, and inclusion.
- Advocacy experience, with exceptional written and oral communication skills.
- Expertise with budgeting and financial management.
- Strong organizational management abilities.
- Creative, forward-thinking marketing skills.
- Strong collaborative team building and strategic management skills.
- Ability to travel throughout New York and the United States is required for the sake of building and sustaining member and partner relationships.
- Preference for tri-state area resident who can routinely commute to the Wall Street office

### *Personal Characteristics*

In addition to the qualities listed above, the ED/CEO must possess these characteristics:

- A commitment to results. The ED/CEO should have a track record of success leading organizations through transformational change.
- A business savvy, strategic visionary. Takes an innovative approach to managing resources and opportunities.

- Proactively identifies opportunities and challenges. Proposes solutions. Engaged in the long-term success of the profession.
- Dependable and emotionally intelligent with a high level of integrity.
- Member-focused servant leader with a commitment to building relationships.
- 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. Ensure the board is informed, involved, and moving forward.
- Builds strong, lasting relationships with stakeholders.
- An inspirational and motivating leader with a positive attitude. Able 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.

## Compensation

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

## To Apply

To apply, please send a cover letter and current résumé (Microsoft Word® format preferred) to <https://jobs.crelate.com/portal/sterlingmartin/>. 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.

*NYSSCPA 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 orientation, genetic information, or any other protected class.*