

EXECUTIVE SEARCH



CEO & Executive Director

SEARCH CONDUCTED BY

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a s s o c i a t e s

The Opportunity

The New Jersey Society of CPAs (NJCPA) is conducting a search for its next CEO and Executive Director (CEO/ED). The CEO/ED reports to the NJCPA Board of Trustees and is responsible for the success of the Society and its three affiliates. The CEO/ED has responsibilities that include mission building and planning, and management of staff and volunteers. The CEO/ED develops and makes recommendations on how NJCPA can strategically meet future challenges to maximize the Society's effectiveness. As the Society's Chief Staff Executive, the CEO/ED develops effective relationships with individual and organizational stakeholders and plays a key role in advocating for issues that impact members and the financial professionals community.

About NJCPA

Established in 1898, the [NJCPA](#) serves New Jersey CPAs through its many education programs, networking leadership opportunities, and advocacy work. Today NJCPA has an annual combined revenue of about \$7.8M, 11 chapters, more than 14,000 members, and operates three affiliates. Its staff of approximately 30 employees work to fulfill the organization's vision to equip and empower New Jersey's accounting and finance professionals to thrive in their careers. Supported by four strategic pillars and four directional initiatives, its mission is to support its members by promoting and maintaining high professional and ethical standards of public accountancy in the state of New Jersey, developing and improving accountancy education, and protecting the interests of the public and the members of the Society. NJCPA's publications are key resources accounting professionals look to for the latest information specific to the state of New Jersey and include its website's Knowledge Hubs, *New Jersey CPA Magazine*, NJCPA Focus blog, and IssuesWatch podcast.

Diversity, equity, and inclusion are core values at the NJCPA. The Society's experience has affirmed that different ideas, perspectives, and backgrounds create a stronger and more creative work environment that delivers better results. Diversity and inclusion are the principles guiding how NJCPA builds teams, cultivates leaders, and creates a membership organization and profession that is the right fit for every person in it. In principle and in practice, NJCPA is committed to diversifying the accounting profession because a workforce that is reflective of the communities it serves is strongly positioned to succeed in an evolving, global marketplace. For more information and content related to how NJCPA supports diversity in the profession, visit [NJCPA's Diversity Statement](#) page.

The CEO & Executive Director Role

Essential Duties and Responsibilities

The CEO & Executive Director, who is hired by and serves at the pleasure of the New Jersey Society of CPAs Board of Trustees, fulfills responsibilities in:

- Mission Building and Planning
- Developing and Managing Volunteers
- Managing Staff and Others
- Board Relations
- Policy Development and Implementation
- Government Affairs/Lobbying
- Fiscal Management
- Communications

All staff members report, either directly or indirectly, to the CEO/ED. The CEO/ED's primary responsibility is to ensure that the Society's mission is carried out effectively in accordance with Board of Trustees' direction and within established financial constraints. The CEO/ED has oversight responsibility for the New Jersey Society of CPAs and all its affiliates.

Principal Duties, Responsibilities, and Accountabilities Include

- Planning/Mission and objective development/policy development, implementation, and enhancement.
- Continually study, analyze, and monitor the Society's mission and objectives in relation to the ever-changing environment.
- Develop and make strategic recommendations regarding how best to meet future challenges to maximize the Society's effectiveness.
- Plan and formulate policies, procedures, and programs and their implementation to assure the Society's objectives are met.
- Provide support and counsel to the committees/resource groups, task forces, and councils of the Society (including any standing or administrative committees).
- Implement the Society's strategic plan and ensure it is supported by appropriate budget, programming, and resource allocations.

Leadership/Governance

- Serve as a member of the Board of Trustees and Executive Committee.
- Attend all Board of Trustees and Executive Committee meetings. Inform the Board of all significant activities, operations, and conditions relating to the Society and staff. Handle, either directly or indirectly, the tactical implementation of all Executive Committee and Board of Trustees decisions.
- Recommend items for inclusion on the agenda which require Board or Executive Committee consideration. Where appropriate, recommend suitable action or solutions.
- Provide security for all files, legal and historical documents, membership and mailing lists.
- Keep members and staff up to date regarding Board of Trustees and Executive Committee decisions, policies, etc.
- Execute all decisions of the Board of Trustees and/or Executive Committee.

- Carry out such other general responsibilities as may be delegated by the Board of Trustees and/or Executive Committee.

Advocacy

- Plan, coordinate, and conduct a legislative program to support desirable legislation and prevent the enactment of undesirable legislation.
- Monitor and record political actions and status of legislation affecting the profession. Inform officers, the Board of Trustees, and appropriate member committees of related developments.
- Develop and maintain effective relationships and serve as a liaison with related professional, and public organizations, colleges, universities, and other educational institutions (including the American Institute of CPAs, other state CPA societies, and the New Jersey State Board of Accountancy) to achieve united action whenever possible, and to enhance the Society's and its members' position, in accordance with the Society's mission, objectives, and policies.
- Develop programs and policies to promote public awareness and confidence in the integrity, objectivity, competence, and professionalism of all Society members and in the services they provide.

Contribute to Member and Organizational Success

- Provide leadership and guidance to staff and members in a manner which promotes interest and maximum member participation in the Society's activities.
- Plan, organize, and direct membership promotion and retention programs; evaluate and recommend actions to achieve membership goals.
- Supervise the development and conduct of continuing professional education programs to ensure members are fully prepared and equipped to satisfy the demands of users of their professional services.
- Supervise the ongoing development and implementation of a Professional Ethics Program by which to monitor and regulate members' professional performance.
- Communicate with members through various media, Society activities, legislative considerations, and other pertinent information.
- Direct the planning, and exercise, of budgetary control over general membership and leadership meetings and conferences.
- Provide the necessary liaison and staff support to committees and their chairs to enable them to perform effectively.
- Submit committee recommendations and decisions to the Board of Trustees for approval.
- Proactively identify potential Society leaders and diligently assist them in increasing their knowledge of the Society's activities, policies, and procedures.
- Assist chapters and committees in formulating suitable activity programs and in coordinating these programs with the overall objectives of the Society.

Management & Fiscal Accountability

- Work with the Finance Committee, the Treasurer, and CFO to develop and recommend to the Board of Trustees an annual budget. Monitor and approve all financial expenditures and negotiate contracts in accordance with Board of Trustees' direction. Ensure that the Society

functions within established financial guidelines.

- Safeguard and protect all Society funds, assets, and other property. Ensure that they are appropriately administered.
- Oversee recruiting, hiring, training, and motivation of staff personnel.
- Review and determine the need for modifications to staff organization and develop an effective organization structure for accomplishing the Society's mission.
- Define and establish performance standards and supervise staff performance reviews regularly.
- Review salary structure and adjust as necessary to maintain competitive and equitable structure.
- Supervise the collection of dues and the termination of delinquent memberships.

Diversity, Equity, and Inclusion

- Drive diversity, equity, and inclusion through NJCPA's policies, initiatives, actions, and processes, continuing to integrate DEI into the Society's culture.
- Develop recommendations and plans to intentionally make and measure progress toward realizing the Society's DEI goals.

Required Skills, Experience, and Qualifications

- For consideration, individuals should possess a minimum of 15 years of work experience related to the above-described duties, responsibilities, and challenges.
- A Bachelor's degree is required; an advanced degree is strongly preferred.
- Prior experience in successfully leading and working with volunteers and reporting to a Board of Trustees is required.
- Leadership and responsibility within a professional association is strongly desired.
- The CPA designation is desirable but not required.
- Certified Association Executive (CAE) certification is a plus.
- Experience acting as the spokesperson for an organization and building strong relationships with external partner organizations is preferred.
- Outstanding, proven relationship-building skills, with ability to work with multiple stakeholders, both individuals and organizations, to accomplish goals and manage expectations.
- Demonstrated ability to achieve results through others; highly skilled at building cohesive teams that support the organization's mission.
- Drive and ability to create a workplace and association that reflects NJCPA's commitment to diversity, equity, and inclusion throughout its membership, leadership, staff, processes, and activities.

Personal Qualities and Competencies

- An energetic, charismatic individual who values relationships, enjoys building strong alliances, and thrives on being the face of a dynamic organization and the professional field it represents.
- Poise and maturity, a high level of energy and drive, a positive "make things happen" attitude,

- enthusiasm, and strong administrative/ management skills.
- Creativity, vision, and previously demonstrated abilities to plan for, and lead, an organization into the future in such a way that the organization and its purpose is not only maintained but further developed and enhanced.
 - A strong self-image, high confidence level, and the ability to work comfortably "behind the scenes" as well as "out front."
 - A strong degree of adaptability and flexibility to relate to a wide variety of people, projects, ideas, and to the constantly changing leadership and philosophies at the Board of Trustees level.
 - Strong planning and organizing skills with an ability to develop projects and achieve results through the efforts of others.
 - Ability to assess and develop staff talents, recognizing opportunities to motivate, celebrate, and reward effective performance; ability to proactively identify and fill talent gaps.
 - A team player who can work well and interact effectively with many people both inside and outside the Society.
 - Outstanding oral, written, and listening communication skills.
 - A personal value system encompassing high integrity and strong moral character.
 - Candidates from diverse and historically under-represented populations are encouraged to apply.

Compensation

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

To Apply

To apply, please send a cover letter and current resume (Microsoft Word® format preferred) [here](#). 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.

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Additional Information

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