**CAW Network USA – Director Positions**

Director positions = where a volunteer member takes a part time staff position as part of the operational team. These positions are eligible to be Board Observers. As we grow CAW Network USA, we plan to bring in additional staff as needed, but initially we are reliant on our volunteers.

**About CAW Network USA**

CAW Network USA was formally announced on 19th November 2020. It was formerly the Association of Chartered Accountants in the USA (ACAUS). We are focused on supporting and connecting over 7,000 Chartered Accountants residing in the USA. Chartered Accountants Worldwide (CAW) which CAW Network USA is joined with, brings together over 1.8 million members and students from 15 Chartered Accounting institutes. Details can be found on our website <https://cawnetworkusa.com>

For CAW Network USA to continue its growth and focus on educating and networking members in the USA we have the following openings:

**Priorities:**

* Director CPE – filled: Robert McDonald (also chapter head Dallas)
* Director Education
* Director Alliances
* Director Member Services
* Director Programming
* Director Podcasts – filled: Breiffni O’Domhnaill
* Director Digital Media
* Director Philanthropy
* Assistant Treasurer
* Assistant Director Member Advocacy East
* Assistant Director Member Advocacy West

**Others under consideration:**

* Director Technology – currently covered by the executive team.
* Director Business Development – currently covered by the executive team.
* Director Special Projects – ad hoc / as needed. Most recently was David Nickson implementing a salesforce member management solution for us October 2019 – February 2020.

The position details are listed below. They are aspirational as most are currently covered to some extent by the chief executive and executive team. Our expectation is that if we can expand our volunteer resource with specific ownerships, this will help us drive growth in both members and revenue, enabling us to expand the activities we are able to pursue.

The executive committee per our bylaws is empowered to engage and discharge individuals to fill staff and volunteer positions. By default, these volunteer positions report into the chief executive, but other reporting lines may be added at the discretion of the executive team. For example, the Assistant Treasurer position would logically report to / work with the Treasurer.

**If you are an interested candidate or would like to nominate a candidate, please respond to chiefexecutive@cawnetworkusa.com**

**Term of Office**

Duties may be assumed immediately upon appointment. Term of office is one year, renewable annually, and that each director continue in the role if both parties are in agreement.

1. **Director CPE**. Position currently filled by Robert McDonald (Dallas). Estimate 10-15 hours / month.
   * Responsible for maintaining our NASBA accreditation and assessing the annual renewal amount / ensuring it is paid on time.
   * Owning the CPE approval process for events and being our escalation point for any questions or issues arising.
   * Reviews the CPE plans for each event in advance, as needed, ensuring we have adequate documentation stored in TEAMS to support each event.
   * Audits event results and resolves questions arising.
   * Backup to prepare and send our CPE certificates if needed.
   * Maintains and updates a summary CPE credits issued record, that feeds into our Board reporting.
2. **Director Education** – Open. Estimate 30 hours / month.
   * This position focuses on our ‘educating’ members and covers:
     + E-learning (IQEX, AICPA classes, self-study)
     + Agreeing a program of CPE eligible events / webinars that match CAW, Institute and CAW Network USA priorities
     + Any additional initiatives that add to ‘education’.
   * Reviewing Institute and other accounting body / accounting practice / consulting firms’ initiatives, to look for ways we can engage, assist, make content available to members.
   * Curating content – adding and updating classes.
   * Monthly status report to feed into the Board pack as relevant.
3. **Director Alliances** – Open.Estimate 30 hours / month.
   * **This position could also head up a committee with representatives from each of the leading accounting / consulting firms. So that we have multiple connection points into those businesses which have a significant number of Chartered Accountants as members. Also those who are actively recruiting or rotating CA’s globally.**
   * Historically ACAUS had a council with representatives of the major accounting firms, and these members were the key conduits to work with these firms in practice. Their role includes advertising our organization to new arrivals, providing speakers for events and encouraging participation in activities.
   * This position is to establish a director who can in turn develop and build an accounting practice engagement council to re-establish CAW Network USA as a destination for CA’s in the USA. To encompass the major accounting firms and consultancy practices.
   * To champion our IQEX course and its benefits to the accounting practices whose members institutes have Mutual Recognition Agreements in place with AICPA/NASBA.
   * To consider building out an ‘Accounting Practices’ page on our website. (Something that in turn dovetails with the Director – Member Services position).
   * Monthly status update to feed into the Board pack as needed.
4. **Director Member Services** – Open - Estimate an initial ‘surge’ to set up and then 20 - 24 hours / month.
   * Focus is on value we can add for members through assisting with networking and support activities. Championing the value of the CA qualification.
   * Initially to assist in setting up a jobs / careers page for our website.
   * This page to include links to recruiters / agencies / members who are hiring managers, that understand the value of a CA qualification, as well as featuring CA members that are in the recruitment industry as contacts. Note: Good organizations are always interested in talking to potential candidates who can add value to their organization.
   * To also link to contacts at the major accounting practices and with our home institutes, who can advocate the value of CAW Network USA to major accounting practices in our home countries (here the role can work in tandem with the Director – Alliances)
   * Jobs page to feature referrals from ‘partner’ agencies with an associated fee agreement if our sharing postings results in placement.
   * To add an FAQ section to answer most asked questions.
   * To explore / outreach to other interested organizations i.e. British American Chamber of Commerce or similar.
   * To summarize status / noteworthy items in a report to be included in the monthly Board pack as required.
5. **Director Programming** – Open - Estimate 30 hours / month.
   * To focus on our events program / calendar for each year.
   * Building out chapter events with the Directors Member Advocacy East and West, as well as the chapter heads.
   * Working with our home institutes and partners on agreeing key initiatives and focus for conferences and webinars.
   * Building a calendar to feed into the annual business plan and a monthly update report for the Board pack.
   * Agreeing who is leading / delivering each event – working with chief executive, Tech support, event management (ideally a future staff position if budget allows).
   * Monthly status report for the Board pack.
6. **Director Podcasts** – Currently Breiffni O’Domhnaill (New York) is setting this up. Estimate 20 hours / month
   * Agreeing the technical platform and process for planning / recording / editing podcasts
   * Working with Chief Executive and Big Top for support as needed
   * Agreeing a script that can be re-used with each podcast focusing on highlighting the choices and difference a member has made as a CA.
   * Agreeing members to interview and arranging times for this.
   * End result feeds into a Podcast page on the website and also links to the CAW / HI program on members who are differentiators.
   * Target to build up a library of podcasts that we can also extract segments from to promote members / CAW Network USA with via social media.
   * Ties into a separate project to extract podcasts out of webinar and conference material that we are discussing with Big Top.
   * Monthly status report for the Board pack.
7. **Director Digital Media** - Open - Estimate 30 hours / month.
   * Responsible for agreeing / implementing a social media plan.
   * Website content and design
   * Current focus is Linkedin – need to focus on improving our Linkedin presence and getting regular updated content.
   * Summarizing activity for monthly Board reporting.
   * Working with Home Institutes / Member Organization representatives, to be familiar with their plans and assess degree of fit for CAW Network USA.
   * Decide on adding additional outlets (Facebook, Twitter, Instagram etc.)
   * To ensure all events are promoted / amplified on relevant social media.
8. **Director Philanthropy** - Open - Estimate 16 hours / month.
   * Responsible for setting up and maintaining a Philanthropy page on our website.
   * Page to feature charities that our members / former members are active with.
   * Highlight a bio of each member and their role with the charity.
   * Encourage members to consider supporting these charities and running a program to feature a specific charity each month.
   * To report as needed to the Board (Monthly board pack updates)
9. **Assistant Treasurer** – Open - estimate 20-30 hours / month.
   * Reports to and assists our Treasurer and backup to Treasurer to attend Board / Executive meetings as necessary.
   * Next in line for Treasurer Board position when Treasurer reaches term limit or stands down.
   * Treasurer role:
     + is accountable for and has charge of all funds of the Association.
     + deposits all receipts and pays all bills of the Association.
     + keeps an itemized record, in a permanent form, of all receipts and expenditures, assets and liabilities (Quickbooks).
     + ensures the Association remains in compliance with all Federal, State and Local laws and regulations.
     + prepares financial statements.
     + prepares the annual budget of the Association and presents such budget to the Board.
     + works with the independent CPA to complete the annual audit prior to the Annual Meeting.
     + presents audited financial statements of the Association at the Annual General Meeting of the Association.
     + oversees the work and duties of any Staff or volunteers who provide accounting assistance.
     + Estimated time commitment (Treasurer) is approximately 35-hours / month.
10. **Assistant Director Member Advocacy East** – Open - estimate 20 hours / month.
    * To support and be backup for the Director Member Advocacy East.
    * Director Member Advocacy East role is appointed by the Board and
      + the Board shall determine the geographic areas to be covered and may revise this from time to time. Currently this position covers the Eastern time zone as well as Central (Excluding Texas).
      + this position oversees chapter heads in the region and works with them to agree online and in person meetings and activities.
      + they are responsible for reporting to the Board on status at the monthly Board meeting and to submit a report to be included in the Board reporting pack.
      + Estimated time commitment is approximately 30-hours / month.
11. **Assistant Director Member Advocacy West** – Open - estimate 20 hours / month.
    * To support and be backup for the Director Member Advocacy East.
    * Director Member Advocacy West role is appointed by the Board and
      + the Board shall determine the geographic areas to be covered and may revise this from time to time. Currently this position covers the Pacific and Mountain time zones as well as Central (Texas only).
      + this position oversees chapter heads in the region and works with them to agree online and in person meetings and activities.
      + they are responsible for reporting to the Board on status at the monthly Board meeting and to submit a report to be included in the Board reporting pack.
      + Estimated time commitment is approximately 30-hours / month.
12. **Director Technology** – an individual who has oversight of our technical platform / apps and would lead on any updates / changes with executive team sign off. Also oversight of website metrics and reporting, feeding into the Business plan and monthly Board pack.
13. **Director Business Development** – focuses on a) new revenue generating opportunities (i.e., merchandise); b) bringing in new members from existing institutes and new institutes. Also covers any new partnerships / sponsorship activity.
14. **Director Special Projects** – currently doing ‘as needed’. Exec team member David Freeman covers some ‘projects’ as part of his Executive Team role. This would add an additional lead ‘as needed’. For example, David Nickson implemented our new member management system in Salesforce October 2019 – February 2020, and now contributes as a board observer.