

Time Line for AICPA Volunteer Activities

October

Volunteer Year Begins - The new Volunteer year coincides with the last day of the Fall Council Meeting. At this time a copy of each volunteer group's roster is moved to history (electronic records dating back to 1978 are maintained). All new rosters are then made available to review online via the Volunteer Central website at <http://volunteers.aicpa.org>.

Note: What can be viewed on this website is controlled via granted permissions, i.e. the level of detail can vary depending on whether the individual is a member of the general public, a staff liaison, committee chair, state society executive director, major firm representative, etc.

November – April

Volunteer Application Period Begins - The Volunteer Central website is open all year (for reference purposes) and the general public can view the approximately 180 active volunteer groups. For applications the website is opened, typically in late November to begin accepting applications for the following year. At this time approximately 90 volunteer groups are made available for accepting applications. The window for acceptance of applications extends from late November until May 15th. This application "period" is promoted in various newsletters such as the CPA Letter, Tax Letter, etc.

Note, in most cases applications are not accepted directly for task forces.

General Reports Issued to States and Firms – During this timeframe all state CPA societies and approximately 90 of the largest firms are provided reports of the volunteers from their respective state or firm

Nominations - Usually in mid February the AICPA Nominations Committee meets to decide appointments to the Board of Directors, Council Members at Large, Peer Review Board, and Joint Trial Board. Newly selected members are announced in the April edition of the CPA Letter. In the two months prior to this meeting various recommendation request are solicited from firms, state CPA societies, associations, committee chairs, staff liaison, and selected AICPA leadership.

April – June

State and Firm Recommendations Requested - Each state society executive director and each designated representative from a major firm are asked to visit the Volunteer Central website and review the current and prospective volunteers from their state or firm and make online recommendations as to which volunteers should be appointed. Recommendations originating from a firm or state society are

strongly taken into consideration when final appointments are made in July. Generally these recommendations are not solicited until after all of the volunteer applications have been received – typically by May 15th. The actual window of time for receiving recommendations from firms and states is normally about two weeks and once these recommendations are received then the chairs of each committee are solicited for their recommendations.

Volunteer Group Chairs and Staff Liaisons Recommendations - The chair of a volunteer group (with input from the staff Liaison) is required to provide his or her recommendations as to which members (current or proposed) should be appointed. These recommendations are made via the Volunteer Central website. The chairs window of time is typically two weeks and follows immediately after the state and firm recommendations are received.

Evaluations of Volunteers - The Chair of each volunteer group is required to evaluate each volunteer's contribution to his or her respective volunteer group. Each volunteer receives a simple rating of either; E=Excellent, S=Satisfactory, U=Unsatisfactory, or N/A (not enough information to provide an evaluation). All evaluations are done online via the Volunteer Central website.

Leadership Reports - The Volunteer Services Team readies all reports to be used during the annual Appointments Meeting; this meeting is typically held in early July.

July

Annual Appointments Meeting - The Leadership, Staff Liaisons and the Volunteer Services Team, hold a meeting in early July, where appointments to the majority of volunteer groups (committees, panels, boards, and centers) are made. For a variety of reasons some of the volunteer groups are appointed at other times of the year – however it is at this meeting that approximately 90 of the key standing committees have appointments determined. Note: the nearly 100 task forces do not go through an appointment process.

August – September

Appointment Confirmations and Closing of Open Issues - All open issues (if any) for each Volunteer Group have to be resolved by working with the Staff Liaison, committee Chair, or Leadership. A final “appointed” roster is sent to each staff liaison once the groups roster is deemed complete in order to get a sign-off from the liaison indicating that the roster is indeed correct – in short this is an extra check to make sure that the staff liaison, committee chair, Volunteer Services Team, and Leadership are all in agreement on the final appointments before any of

the members are contacted.

Notification of appointment / non-appointment

All volunteers, both appointed and non-appointed are contacted via emails that are generated by the Volunteer Services Website. The communication for each volunteer group is initiated by the Volunteer Services Team, group by group once the appointments for a given group are complete. The type of correspondence is released in the following order:

1. Appointed current and/or proposed new members are contacted first
2. Current volunteers that are rolling off the committee and ending their service are contacted second.
3. Proposed new volunteers that were not appointed are contacted last.

When a new appointee receives their acceptance email the email contains a unique “member specific” link that allows the member to automatically log into the Volunteer Services Website – which out having to use his or her UserID or Password. Once in the member can either accept appointment or decline appointment. If the member accepts appointment the system automatically checks to determine if the member has previously signed and provided a “lifetime” copyright agreement statement, and if a copyright statement is still required then the member is presented with the agreement via the website.