



Time Line for AICPA Volunteer Activities

May

Volunteer Year Begins: The new volunteer year coincides with the last day of AICPA Spring Meeting of Council. At this time, a copy of each volunteer group's roster is moved to history (electronic records dating back to 1978 are maintained) and all new rosters are made available online via the [Volunteer Central website](#).

June – October

Volunteer Application Period Begins: The application window extends from early-June through early-October. During the application period, the approximately 80 volunteer groups that follow the Annual Appointments process accept applications.

Note: In most cases, applications are not accepted for task forces. Task forces do not follow the Annual Appointments process.

For reference purposes, the Volunteer Central website is open all year and the general public can view all active volunteer groups.

General Reports Issued to States and Firms: During this timeframe all state CPA societies and approximately 100 of the largest firms are provided reports of the volunteers from their respective state or firm.

Nominations: Usually in September, the 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 October.

State and Firm Recommendations Requested: Each state society executive director and designated representatives from a major firm are asked to review current and prospective volunteers from their respective state or firm as to which candidate should be appointed. These recommendations are made online via the Volunteer Central website. Recommendations originating from a state society or firm are strongly taken into consideration when final appointments are made in February. Generally, these recommendations are not solicited until after the volunteer application window closes in early-October. State societies and firms have approximately two weeks post application window closure to submit their recommendations; once these recommendations are received, then staff liaisons and the committee chairs are solicited for their recommendations.

Volunteer Group Chairs and Staff Liaisons Recommendations: Committee chairs of each volunteer group, with input from the staff liaison, are responsible for making recommendations as to which current and prospective candidates should be appointed for the upcoming committee year. These recommendations are made via the Volunteer Central website and are taken into consideration by the Senior Volunteer Leaders of the Institute and other senior leadership. These



recommendations are essential to the annual appointment process. Committee chairs and staff liaisons have approximately two weeks, immediately following state and firm recommendations, to submit their recommendations.

Evaluations of Volunteers: The chair of each volunteer group, with input from the staff liaison, is required to evaluate each volunteer's contribution to his or her respective volunteer group. Evaluations are confidential. 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.

February - April

Annual Appointments Meeting: The AICPA Senior Volunteer Leaders, staff liaisons, and the Volunteer Services Team, hold a meeting in February to appointment volunteers the majority of the AICPA's volunteer groups (committees, panels, boards, and centers). For a variety of reasons, some of the volunteer groups are appointed at other times of the year; however, it is at the Annual Appointments Meeting that approximately 80 of the key standing committees have appointments determined.

Note: Task forces do not go through an appointment process.

Leadership Reports: The Volunteer Services Team readies all reports to be used during the Annual Appointments Meeting.

Appointment Confirmations and Closing of Open Issues: All open issues, if any, for each Volunteer Group must be resolved. The Volunteer Services Team will work with staff liaisons, committee chairs, and/or leadership to ensure any issue is resolved. A final "appointed" roster is sent to each staff liaison once the volunteer groups roster is deemed complete. Each staff liaison must sign-off on the appointed roster to ensure accuracy. This process is an extra check to make sure the staff liaison, committee chair, Volunteer Services Team, and leadership are all in agreement on the final rosters before applicants are contacted.

Notification of appointment / non-appointment: All applicants, both appointed and non-appointed, are contacted via email by the Volunteer Services Team once the appointments for a given volunteer group are complete. Email correspondences are released in the following order:

1. Appointed current (members who are continuing their service) and/or proposed new members;
2. Current volunteers who have completed their service and are rolling off the committee;
3. Proposed new volunteers that were not appointed.



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When a new appointee receives their acceptance email, they must log into the [Volunteer Central website](#) to either accept appointment or decline appointment. If the member accepts appointment, they are automatically agreeing to the [Volunteer Services Agreement](#). If a member declines their appointment, they will not serve on the committee.