IEEE-USA Secretary/Treasurer
Position Description

POSITION TITLE:

IEEE-USA SECRETARY/TREASURER

ROLES

- Serve as the Chief Financial Officer of the IEEE-USA.
- Chair the IEEE-USA Finance and Budget Committee
- Serve on the IEEE-USA BoD, the IEEE-USA OpCom, the IEEE-USA Finance and Budget Committee and the IEEE Finance Committee.

DESCRIPTION OF RESPONSIBILITES:

- Report administratively to the IEEE-USA President.
- Work with the Managing Director to prepare the annual budget, including the rolling 3-5 year financial plan, and monitor financial reports for adherence to the budget of IEEE-USA.
- Provide periodic reporting on financial matters to the IEEE-USA BoD and to the IEEE-USA OpCom, to secure their approval on financial actions when necessary.
- Report on the progress and activities of the IEEE Finance Committee to the IEEE-BoD and the IEEE-USA OpCom.
- Ensure compliance with IEEE policies and procedures in all financial matters relating to IEEE-USA operations.
- Prepare the IEEE-USA Annual Report.

ELIGIBILITY:

- Must be an IEEE Senior Member or Fellow.
- Understand financial accounting for nonprofit organizations.
- Possess financial experience relative to budgets and operations.
- Is financially literate in the areas of accounting, finance, tax principles and basic investment principles.
- Must be able to commit sufficient time to carry out the position's functions and responsibilities.
- Should have the support of that person's employer in meeting the obligations of the position.

TERM OF OFFICE:

- The term of office of the IEEE-USA Secretary/Treasurer shall be for One year with the possibility for election to a second successive one-year term, subject to a maximum continuous service of six years in any combination of IEEE-USA Vice President or Secretary/Treasurer positions.

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ESTIMATED TIME REQUIREMENTS*:

Item	Estimated Time Required: 91 – 100 days
Meeting Material Review	**TOTAL: 48 Hours** • 3 hours per IEEE-USA meeting (6/year) • 3 hours per other meeting (10/year)
In-Person Meetings: (Not including travel time) • IEEE-USA BoD Meetings • IEEE-USA Retreat • Other IEEE-USA Meetings • IEEE Finance Committee	**TOTAL: 14 Days** 1 day (3/year)+regular telecons 2 days (1/year) 1 day (2/year) 1 day (7/year)+regular telecons (3 with IEEE meeting series, 4 in New Jersey, 3 via telecom)
Program Participation/Management Coordination/Oversight (via telecom)	**Total: 2 Hours/Week**
Travel: (does not include meeting time) • Two (2) days per in-person meeting trip	**TOTAL: 8-16 days** 10 meeting trips /year

- Time estimates are based on the IEEE-USA President's minimum commitments, and do not reflect additional trips or time spent preparing, traveling, or participating in other IEEE or IEEE-USA committees meetings or IEEE-USA events, including National Engineers Week, congressional visits day, testimonies, engineering community conferences or meetings, invited talks to external organizations, National Academy conferences, National Medal award ceremonies, etc. that the President may elect to participate in. Actual time required for these additional activities varies significantly depending on the activity, as well as from year to year, and is also subject to the interests and availability of the IEEE-USA President. A typical schedule might include between 10-20 additional obligations of 1-3 days duration (including travel).

REIMBURSED EXPENSES:

Ordinary and necessary IEEE travel expenses are reimbursed in accordance with IEEE policies.

STAFF CONTACT:

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