



Title	Programs Assistant
Department	Membership, PR, and CPE
Reports to	Department Directors
FLSA Status	Non-Exempt
Date Prepared	1.23.2023

Summary: This position executes customer service and administrative functions of the Membership, Peer Review and Continuing Education programs. Under the direction of program directors and CEO, this person helps carry out strategies to sustain and grow ASCPAs membership.

Essential Duties and Responsibilities include the following. Other duties may be assigned.

General Duties:

- Talks with members and other customers via telephone, e-mail, and in person regarding membership information and other services provided by ASCPA as needed.
- Communicates clearly and effectively with members, potential members, CPA firm administrators, and others who have inquiries about ASCPA.
- Primarily responsible for data integrity in membership database; adding new members, address corrections, researching prospective and dropped member's information, etc.
- Primarily responsible assigned administrative roles within the Peer Review and Continuing Education areas.
- Other duties as assigned.

Membership Recruitment Duties:

- Works with firm administrators to show the value of ASCPAs membership and ensure member retention and/or new member enrollment.
- Prepares and distributes prospective member packets.
- Primary contact for firm administrators to maintain member lists by organization, which is done twice a year.
- Processes new licensees and recent exam passers in database.
- Compiles and maintains prospective and current membership lists.
- Compiles lists for monthly mailing of membership certificates and provides to communications, so certificates are printed and mailed.
- Processes new student membership forms.
- Ensures drip campaign is current for all prospective members and active members.
- Other duties as assigned.

Membership Retention Duties:

- Processes all membership applications.
- Processes membership and contribution batches from accounting; files and maintains all dues invoices after processing.
- Serves as primary contact regarding membership and member records, i.e. database contact information.
- Maintains appropriate member files and records.
- Assists in the implementation and maintenance of various affinity programs.
- Assists in monitoring the marketing activities of competing programs and services.
- Other duties as assigned.

Peer Review Duties:

- Works with peer review team on basic maintenance of peer review files.
- Helps maintain accuracy of PRISM database.
- Assists team with scheduling or other administrative assignments.

Continuing Education Duties:

- Talks with members who need assistance in registration or modification of CPE courses.
- Provides liaison service to any third-party CPE providers.
- Assists with year-end CPE compliance records.
- Assists director with any conference or ASCPA planned education event.

Supervisory Responsibilities

This position has no supervisory responsibility.

Specifications

This is a full-time position.

Qualifications

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

Education, Training and/or Experience

Associate degree (AA) or equivalent from a two-year college or technical school; or six months to one-year related experience and/or training; or equivalent combination of education and experience.

Knowledge and training in contact management systems, database software, project management software, spreadsheet software, and word processing software.

Email resumes to jbirmingham@alabama.cpa.