

PURPOSE

This Leadership Pathway Profile describes the Academy Treasurer pathway in a manner consistent with the Academy bylaws, fiduciary governance practices, and Academy-specific expectations established through governing documents, Board policy, committee charters, and organizational practice. For purposes of this profile, “Past Treasurer” refers to the immediate Past Treasurer role identified in the Academy bylaws.

ROLE OF THE POSITION IN A PROFESSIONAL MEMBERSHIP ASSOCIATION

In a professional membership association, the Treasurer serves as a fiduciary officer leader of the Board of Directors. The Treasurer leads Board-level financial oversight, reporting, and policy review related to the Academy’s financial position, audit process, reserves, investments, and long-term financial sustainability, in partnership with the Chief Executive Officer and finance leadership and consistent with Board authority. The Chief Executive Officer remains responsible for operational fiscal management, headquarters operations, and staff management, subject to direction by the Board of Directors.

LEADERSHIP PATHWAY PHILOSOPHY

The Treasurer Leadership Pathway promotes continuity of financial leadership, finance governance experience, succession planning, and institutional knowledge across a three-year leadership commitment.

ACADEMY-SPECIFIC RESPONSIBILITIES

- Finance and Audit Committee leadership
- Board-level financial reporting and fiduciary oversight
- Public policy participation
- Foundation-related financial leadership and philanthropic engagement, as applicable under Foundation governing documents, Board policy, or Academy practice
- Monitoring and ensuring maintenance of applicable tax-exempt status, and ensuring required reporting to state and federal governments

POSITION OVERVIEW

The Treasurer Leadership Pathway includes three consecutive roles—Treasurer-elect, Treasurer, and Past Treasurer—that sustain financial leadership and help the Board of Directors fulfill its fiduciary oversight of the Academy’s financial resources and long-term sustainability.

TERM

Treasurer-elect – 1 year

Treasurer – 1 year

Past Treasurer – 1 year

Total leadership commitment: 3 years.

QUALIFICATIONS

- Academy member in the credentialed Active or Retired classification.
- Demonstrated leadership experience within the Academy and/or other professional, community, nonprofit, healthcare, academic, or business organizations.

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Revised:

- Preferred experience participating in national, affiliate, and/or district dietetic association activities within the previous five years.
- Experience in financial management, budgeting, auditing, investments, enterprise risk management, reserves management, financial policy development, or related financial oversight.
- Registration with the Commission on Dietetic Registration (CDR) preferred.

PATHWAY LEADERSHIP COMPETENCIES

Leadership & Financial Governance

- Commitment to servant leadership and stewardship of the Academy's mission and resources.
- Experience serving on boards, committees, task forces, or other leadership bodies.
- Understanding of fiduciary responsibilities and nonprofit governance.
- Ability to facilitate productive discussions and support effective governance.

Strategic Vision

- Ability to think strategically and guide long-term organizational priorities.
- Understanding of trends affecting nutrition, healthcare, association leadership, and the profession.
- Ability to identify opportunities and risks affecting the Academy and its members.
- Ability to align volunteer leadership with strategic priorities.

Board & Volunteer Leadership

- Ability to inspire confidence and engage volunteer leaders.
- Ability to build consensus among diverse stakeholders.
- Ability to support effective Board performance and governance practices.
- Ability to facilitate collaborative decision-making.

Communication, Influence & Advocacy

- Strong communication and presentation skills.
- Ability to serve as a credible spokesperson and advocate for the profession.
- Ability to engage effectively with members, policymakers, partners, media, and the public.
- Ability to consider diverse member perspectives while advancing the Academy's strategic priorities.

Professional Knowledge & Stewardship

- Understanding of the Academy's governance structure, strategic priorities, organizational units, and key programs.
- Knowledge of issues affecting the profession and membership.
- Demonstrated integrity, sound judgment, and commitment to ethical leadership.
- Commitment to transparency and stewardship of Academy resources.

EMPLOYER SUPPORT AND COMMITMENT

Successful service in this role requires a meaningful commitment of time and active participation throughout the term of office. Candidates should ensure they have the personal, professional, and employer support necessary to fulfill meeting attendance, travel, preparation, and leadership responsibilities associated with Academy governance.

EXPECTATIONS OF SERVICE

- Act in the best interests of the Academy and its members.
- Maintain confidentiality when appropriate.
- Prepare for and actively participate in meetings and discussions.
- Fulfill responsibilities consistent with Academy governing documents, Board policies, committee

charters, and applicable governance practices.

- Promote effective governance and ethical leadership.
- Commit the time, energy, and expertise necessary to advance the Academy's strategic priorities.

TREASURER-ELECT PROFILE

- Member, Board of Directors.
- Supports the President and Treasurer in advancing the Academy's strategic direction, values, and financial stewardship.
- Member, Finance and Audit Committee.
- Participates in public policy efforts and Action Alerts.
- Participates in other committees or leadership assignments as provided by Board policy, committee charter, or Academy governance practice.

TREASURER PROFILE

Governance Leadership

- Serves as the Academy's elected Treasurer and bylaws-designated chief financial officer.
- Serves on the Board of Directors and Executive Committee.
- Chairs the Finance and Audit Committee.
- Supports the President in advancing the Academy's strategic direction and values.
- Helps the Board fulfill its fiduciary responsibilities and promote financial accountability.
- Participates in other committees or leadership assignments as provided by Board policy, committee charter, or Academy governance practice.
- Exercises the duties of care, loyalty, and obedience and place the interests of the Academy above personal, professional, geographic, or constituent interests.

Financial Stewardship & Fiduciary Oversight

- Leads Board-level review, recommendation, and oversight of investments, reserves, financial policies, audit matters, enterprise risk management, and organizational financial sustainability.
- Reviews annual budgets, financial performance, and long-range financial plans.
- Oversees Board-level review of the annual audit and related recommendations.
- Reviews and recommends financial policy updates, consistent with Board authority and applicable committee charters.
- Oversees processes to select and evaluate investment management and audit partners, including RFPs as appropriate, without assuming operational management responsibility.
- Reports the Academy's financial status to the Board of Directors and members and communicates with the House of Delegates and other stakeholders as appropriate.

Strategic Financial Leadership

- Helps the Board evaluate financial opportunities, risks, and long-term sustainability.
- Guides governance review of financial strategies, reserve practices, and investment policies.

Foundation Leadership

- Provides Foundation-related financial leadership and philanthropic engagement as applicable under Foundation governing documents, Board policy, or Academy practice.
- Supports Foundation philanthropic initiatives, including maintaining a personal annual giving and engagement plan when established as an Academy or Foundation expectation.
- Chairs the Foundation Finance Committee.

Governance Partnership

- Maintains a collaborative partnership with the Chief Executive Officer and finance leadership while respecting the distinction between Board oversight and operational fiscal and staff management.

Accepted: 7/17/26

Revised:

- Distinguishes governance oversight from management and respects the respective roles of volunteer leaders and staff.

PAST TREASURER PROFILE

- Member, Board of Directors.
- Member, Finance and Audit Committee.
- Provides continuity, historical perspective, mentorship, and leadership counsel to strengthen Board effectiveness, financial stewardship, organizational stability, and leadership succession.
- Participates in public policy efforts and Action Alerts.