

Program for Chapter Activities

2016 - 2017

INTRODUCTION

Beta Alpha Psi is a nonprofit international honor and service organization for accounting, finance, and information systems students at AACSB or EFMD/EQUIS-accredited universities. Beta Alpha Psi provides opportunities for development of technical and professional skills to complement university education; participation in community service; and interaction among students, faculty, and professionals.

OBJECTIVES OF THE PROGRAM FOR CHAPTER ACTIVITIES

The Program for Chapter Activities (PCA) serves as a guide to each chapter in planning its own programs and activities. The chapter programs and activities should reflect each chapter's unique student membership and environment. If Beta Alpha Psi's objectives are to be achieved, each chapter must conduct a program that will encourage eligible students to join the chapter and actively and enthusiastically participate in its activities. The chapter's activity plan should be carefully thought out and implemented to assure the achievement of both the Beta Alpha Psi's and the chapter's stated objectives.

The Program for Chapter Activities establishes guidelines for a minimum level of chapter activity as well as guidelines for chapters who seek recognition for outstanding performance. In addition, the Program for Chapter Activities incorporates features designed to:

- Encourage chapters to fulfill the objectives of Beta Alpha Psi and prepare members for careers as financial information professionals,
- Identify chapters needing assistance from Chapter Advocates and Professional Partners, and
- Recognize chapters that excel in serving their members, campus, community, and/or profession.

The Program for Chapter Activities applies to both current and petitioning chapters. Petitioning chapters are eligible for award status, but requirements will not be prorated for petitioning chapters who begin the petitioning process during the reporting year.

BETA ALPHA PSI POLICIES

CHAPTER ACHIEVEMENT LEVELS

In planning for each year, a chapter should organize activities to meet the requirements of one of the following chapter achievement levels:

- Mission based chapter
- Distinguished chapter
- Superior chapter

						least 1 mandatory "Essential Skills" session. (pages 7 & 8)	
<i>Mission Based</i>	Yes	No	Yes	Yes	3	6	1
<i>Distinguished</i>	Yes	Yes	Yes	Yes	5	*6	1
<i>Superior</i>	Yes	Yes	Yes	Yes	8	*6	1

To qualify as a professional or service activity, the event must be at least 50 minutes in length and at least 25% of the chapter's active members/candidates for the month must participate in the event.

To qualify as a superior or distinguished chapter, there are also individual member/ candidate professional and service hour requirements. These requirements are designed to encourage involvement of Beta Alpha Psi members and candidates in professional and community service activities, not only as a chapter but also individually.

ACTIVITY HOURS REQUIRED FOR AWARD SEEKING CHAPTERS

Chapter Achievement Level	Minimum Hours of Professional Activities (per Member/Candidate)	Minimum Hours of Service Activities (per Member/Candidate)	Total Minimum Hours of Professional and Service Activities (per Member/Candidate)
<i>Distinguished</i>	8	8	20
<i>Superior</i>	12	12	32

The online student can meet their service requirements via the same model as non-BAP hours, only theirs would count as "BAP-Service Hours for Online Students". Examples of service hours they could report includes:

- Tutoring other online students in accounting, finance or IS
- Tutoring high school students in math
- Tutoring Community College Students in accounting, finance or IS
- Volunteering at a local food bank, animal shelter, nursing home or community center

Under the Program for Chapter Activities, an hour consists of 50 minutes. For example, an activity that lasts 60 minutes will be awarded 1.2 hours of credit under the PCA.

NON-BAP HOURS

At the individual level, chapters may report a maximum of five hours (250 minutes) per year (per student) of professional activities and a maximum of five hours (250 minutes) per year (per student) of service activities that are not sponsored by Beta Alpha Psi. These hours should be reported as a single professional or service activity on the Reporting Intranet online activity screen. Fall and spring hours should be reported separately. Chapters must retain detailed information regarding the non-Beta Alpha Psi activities until October 1 of the following year.

BEGINNING OF YEAR REPORT

All US chapters must submit the Beginning of Year Report by **October 15**.

All International and Oceania Region chapters must submit the Beginning of Year Report by **May 1st**.

To complete this report, go to the "Enter Beginning of Year Report" tab in the Reporting Intranet and:

1. Update the Chapter Profile. This section lists current officers, Faculty Advisor, and other information.
2. Enter the Plan of Activities, including dates and programs (either planned or anticipated) detailing the chapter's plan for fulfilling the mission based activities.
3. If the chapter bylaws have changed from the previous year, attach a copy of the revised bylaws. If the bylaws have not changed, click on "No Changes Needed."
4. Pay annual chapter maintenance fee online by credit card or by check payable to Beta Alpha Psi. Once the payment has been confirmed the Executive Office will check off this box "received". An invoice may be printed from the Reporting Intranet.

MID YEAR REPORT

All US Chapters must declare themselves as award seeking (if applicable) on the Chapter Profile page by **December 15**. Complete fall semester reporting by December 15.

All International and Oceania Region chapters must declare themselves as award seeking by October 1. Complete fall semester reporting by December 15.

CANDIDATES

Candidates should be entered into the Reporting Intranet **on a monthly basis**. *Do not enter candidates into the system until the \$65 fee has been collected.* Within 60 days of a candidate being entered into the system, the chapter must pay a one-time, non-refundable fee of \$65 to the Executive Office via credit card payment or by check. The check should be made payable to Beta Alpha Psi and include the chapter number on the check (or memo line). A list of individuals for whom the check relates should accompany the check. For payments made after 60 days, a late fee of \$20 per candidate will be charged.

Be sure that candidates are eligible and the fees received prior to input since credits will only be awarded by the Executive Office on an **exception basis**.

While the Executive Office (and Board) encourages accepting online students as candidates, the mechanism for measuring professional and service participation level is left to the discretion of each chapter. Some guidelines are provided within this document.

TRANSFER MEMBERS

Chapters must contact the Executive Office in writing for verification of transfer members. Once the EO has confirmed that the transfer student is a member of BAP, the new chapter will enter them into the Reporting Intranet as a new candidate. The Executive Office will then credit the \$65 fee. If the transfer member requests a certificate from the new chapter, the chapter must pay the \$15 processing fee.

INITIATION

All chapters must hold at least one new member initiation and officer election each year. The official ceremony should be followed. Each initiate must be present at the initiation ceremony. Initiations "in absentia" will only be allowed under extreme circumstances approved by the Board President. After the initiation, go to "Report Activity>Initiation" in the Reporting Intranet and enter the number of initiates.

Second Initiation: A second initiation qualifies as a Reaching Out activity.

When a candidate is initiated, the student should be moved from candidate to initiate status on the Reporting Intranet. This will serve as notification to Executive Office to print membership certificates. If the chapter wants to receive membership certificates in time for the ceremony, Executive Office must be notified at least two weeks prior to initiation.

Requests for certificates to be mailed overnight delivery cost \$50 effective **August 1st**.

END OF YEAR REPORT

All chapters must prepare and submit an End of Year Report by **June 1**. NOTE: Failure to file the EOY Report by June 1 will result in a \$100 late filing penalty. To complete this report, go to the "Enter End of Year Report" tab in the Reporting Intranet and:

1. Update the Chapter Profile page.
2. Attach the chapter's Statement of Financial Position and Statement of Activities. See the Financial Reporting Guide (<https://www.bap.org/financial-reporting-guide>) for more information. These statements may be attached in Word, Excel or pdf format.
3. Complete the chapter reporting including updating all professional and service hours.
4. Complete the Faculty Advisory Sign-Off. (This must be completed by the Faculty Advisor, logged in under his/her password.) This sign-off requires the Faculty Advisor to:
 - Verify the Non-Beta Alpha Psi hours reported by the Chapter
 - Complete the tax information - for chapters with revenue less than \$50K, they must submit the online 990n e-Postcard filing and include the submission ID from the Acceptance screen. Please forward a screen shot of the Acceptance screen to the Executive Office. Please be aware that you will not receive an email confirmation from the IRS. You must login to the IRS site after you have filed to check the status. If you indicate that your chapter had average gross receipts (for the past three years) > \$50,000, you must also download the Over \$50K spreadsheet found here <https://www.bap.org/files/copy-of-bap-template.xlsx>, complete it, and attach it.
 - Complete the financial statement sign-off. If you indicate that your chapter had gross receipts > \$100,000 for the past year, you must also attach an auditor's report. See the Financial Reporting Guide for more information.
 - Submit the entire sign-off by June 1.

In order to qualify as an award chapter, all required chapter reporting must be completed by June 1. Only under extreme circumstances will exceptions be considered by the Board.

REACHING OUT ACTIVITIES

All chapters must participate in Reaching Out activities during the year. The following activities are required, depending on the chapter's achievement level:

- Mission Based - 3 activities
- Distinguished - 5 activities
- Superior - 8 activities

See Exhibit B for more detailed information regarding Reaching Out activities.

Chapters domiciled outside the continental United States may request permission from the Director of Global Activities to substitute other activities for the Reaching Out activities listed above. The maximum number of allowed substitutions will be:

- Mission Based – 1 substitution
- Distinguished – 2 substitutions
- Superior – 3 substitutions

Chapters should update the “Report Activity>Reaching Out Activities” tab on the Reporting Intranet by December 15 and June 1. Even though more than one chapter member may attend an event, such as a Regional Meeting, only one credit is received for the Reaching Out activity. Most activities also result in participation minutes for the individual(s) attending the event. These minutes should be recorded on the online activity reporting screens in the Reporting Intranet.

Professional Activities

Exhibit A

Currently all chapters are required to report at least 6 professional activities per year. Chapters can pick and choose the topics from the PCA list below.

- Chapter professional meetings
- Joint meetings with professional organizations
- Joint meetings with on-campus organizations
- Local seminars/workshops (but not those involving “paid” tuition)
- Field trips
- Meet-the-Firms Night or Activity (must be a single event where multiple firms are represented and purpose is to provide a significant number of students with information about various firms and industries. This should not be strictly a recruiting event)
- Publications (articles or news notes for newsletter; copy of publication must be submitted to the Executive Office for credit)
- Executive-in-Residence/Professor-for-a-Day programs (time based upon the time a member/candidate attends sessions “taught” by the guest)
- Mock interview activity (must be an event where multiple firms are represented and all member/candidates are eligible to participate, not a recruiting event)
- Activity or meeting with a professional organization

- Social activities with professionals – up to two activities per year with a maximum time of 1 hour (50 minutes) per activity
- Attendance at G.A.M.E. <http://www.quinnipiac.edu/game-forum/>
- All chapters will be allowed to conduct one professional meeting as a Webinar in any of the above listed topics. Chapters should get pre-approval for this as they will have to show how they intend to incorporate internal controls to ensure that the people they said participated, actually did. The chapters will be responsible for finding and utilizing the webinar technology.

Credit is not given for candidate meetings, orientation meetings, organizational meetings, chapter business/planning meetings, initiation and similar activities that provide no professional component.

Essential Skill - Mandatory Professional Activity – Award Seeking Chapters (Distinguished, Superior & Gold)

Along with the above topics, award seeking chapters will have to conduct one mandatory professional session that will include a session devoted to “Essential Skills.” Many students seek to obtain internships and full-time job opportunities through Beta Alpha Psi, but once they have the job, they must develop their “essential skills” in order to succeed professionally. Each chapter can choose one of the below topics for their Essential Skills session.

Business Writing Skills – Business writing skills are different from academic writing. This session will convey the basics of business writing skills that include standardizing, streamlining, and reinforcing a company’s corporate culture by communicating in a professional manner.

Facilitation Skills – This session will help students to learn what to expect when in a professional situation that involves a group discussion format. When speaking in front of a professional group, it should address what physical gestures to enhance or avoid.

Managing Distractions – Emails, phone calls and co-workers stopping by your desk to talk creates distractions. This session will cover how to handle inevitable disruptions to keep one focused and productive.

Ethical Decision Making Skills – Accountancy is based on trust. This session will distinguish one’s core values, ethical decision making.

Negotiation Skills – Negotiation skills are extremely important in maintaining focus in one’s career. This session should cover the basics of negotiations; information gathering, learning to listen, leveraging the situation, goals of the negotiation, costs of the negotiation, bargaining phase and closing the negotiation process.

Conflict Management – Conflict in the workplace is a reality that everyone will encounter at some point in their careers. This session will include tips on how to quickly identify conflict, assess the issue, how to manage oneself and the parties involved and professionally resolve the issue.

Change Management – This session will help students to get informed on what to expect and how to deal with change in the work environment whether it will be a departmental change or organizational change.

Emotional Intelligence - Studies have shown that people with high emotional intelligence have greater mental health, exemplary job performance, and more potent leadership skills.

Interpersonal Skills at the Workplace – Working with others is essential to networking and engaging with coworkers, and clients.

Diversity and Inclusion – At the workplace there are many diverse voices. Inclusion is respecting and valuing those voices.

Accepting Feedback – The ability to accept feedback and learn from it is essential to individual development and growth.

Each Essential Skill activity should be entered into the Reporting Intranet as: **ES – Topic Title.**

Reaching Out Activities

Exhibit B

- Mission Based - 3 activities
- Distinguished - 5 activities
- Superior - 8 activities

Sponsored by Executive Office

All chapters seeking Superior status must now attend either the 2016 Annual Meeting or a 2017 Regional Meeting.

- 2016 Annual Community Service Day Attendance
- 2016 Annual Meeting Attendance
- 2016 Annual Meeting Presentation
- Hosting or co-hosting 2017 Regional Meeting – verified by Chapter Advocate
- Hosting or co-hosting 2016 Community Service Day – verified by Community Service Day Chair
- 2017 Regional Meeting Attendance
- 2017 Regional Meeting Presentation.
- 2017 Nomination for Business Information Professional of the Year
- 2017 Nomination for Outstanding Dean
- 2017 Nomination for Project Run With It
- Participation in EY Inclusive Leadership Award
- Mentoring a Developing Chapter – this mentoring relationship should be approved and supervised by the Chapter Advocate for your region.
- Submission of a “Spotlight On” article for the Beta Alpha Psi newsletter – article must be accepted for inclusion in a future newsletter edition.
- ROA - IS & Finance Interaction
- G.A.M.E. – Beta Alpha Psi will sponsor up to two finance students’ registration fees to attend the GAME Conference in New York City. Each chapter may nominate one finance student no later than February 15th. The selection process will be a random drawing conducted at the Executive Office following the February 15 deadline. Winners will be notified immediately after the drawing. ROA will be granted to the chapters for the two students selected.

Sponsored by Chapter

- Multi-Cultural Professional or Global Leadership Competency Event - This event should incorporate a multi-cultural theme that conveys the importance of understanding how all cultures help to promote a healthy work environment from an international or global perspective. Each chapter should consider incorporating these policies into their local chapter best practices. Examples of possible events are:

- Inviting professionals to share their experience in working in a multi-cultural environment and the impact it has had on their company's bottom line.
 - Inviting local community leaders to share how their experience working with local multi-cultural businesses and community service have helped in building a stronger and dynamic community.
- Minority Recruitment Event (may report 2 per year) - Presenting career information to minority groups or engaging in activities oriented toward the retention of minority students. For purposes of this section minorities are those who are under-represented in the accounting, finance and information systems, i.e., Native Americans, Hispanics, and Black Americans. The career orientation program(s) or activities should be directed toward minority students at the high school level or undecided minority university students. Career materials are available from a variety of professional organizations. These presentations are intended to be in the nature of group sessions. Booths at career fairs, activity fairs, "rush" events, or regular chapter meetings do not count in this category. Other possible projects include special tutoring sessions solely for minority students, counseling sessions, mentoring programs exclusively for minority students, transition year counseling, and other types of activities oriented toward retention. Collaboration with organizations such as NABA, ALFA, and ASCEND are encouraged. These are examples of available resources:
 - AICPA Diversity and Inclusion
<http://www.aicpa.org/career/diversityinitiatives/pages/resourcesforstudents.aspx>
 - NABA student programs:
<http://www.aicpa.org/career/diversityinitiatives/pages/resourcesforstudents.aspx>
- Multi-Chapter Event - A professional or service activity co-sponsored with another Beta Alpha Psi chapter. In order to promote interaction between chapters, this co-sponsored event should involve at least 25% of each chapter's current membership. Virtual multi chapter events are welcome. We will allow one "multi chapter webcast" meeting per year. Chapters who conduct a webcast meeting will have to provide documentation proving that they had controls in place to ensure that those who logged in actually participated and were engaged in the webcast.
- Promoting Careers in Accounting/Finance/Information systems (may report 2 per year) - Career orientations related to accounting, finance and information systems to: pre-decision college students, college students from other majors, or junior high and high school students. Beta Alpha Psi events or programs presented to prospective Beta Alpha Psi candidates which are designed primarily to promote the areas of accounting, finance, and information systems to undecided students but that have as a secondary effect promoting Beta Alpha Psi are acceptable. Virtual career fairs are acceptable to include online students from AACSB accredited online programs. Beta Alpha Psi orientation sessions for members/candidates do not qualify.
- Alumni Activity - A major event to promote communication between alumni and their alma mater. This event should involve participation of at least 25% of the current chapter membership as well as a significant number of alumni.
- Literacy and/or College Application (or similar) program – Chapters can participate in the events below or similar programs within their community, Alternative programs must receive prior approval from the executive office in order to qualify.

- Points of Light is organizing Make a Difference Day on Saturday, October 22, the largest national day of community service. It is a global event so all chapters/teams could participate.
- American College Application Campaign is an organization that organizes events at inner city or rural high schools where volunteers will help student complete college applications in the fall. BAP students would be a great resource for high school students to understand the application/college process.

Second initiation – All initiations should be reported at “Report Activity>Initiation” tab in the Reporting Intranet and the second initiation should be reported as a Reaching Out activity.

Serving Activities

Exhibit C

All chapters, regardless of achievement level, must report one service activity during the year that meets the following requirements:

- Participation by at least 25% of the active members/candidates for the month, and
- The activity must be at least 1 hour (50 minutes) in duration.

These activities must be reported on the online Report Activity screen in the Reporting Intranet.

Chapters seeking Distinguished or Superior award levels must also report a minimum number of service hours per member/candidate. Distinguished chapters must report 8 hours per member/candidate and Superior chapters must report 12 hours per member/candidate. Although there is a minimum number of 8 and 12 hours respectively in the professional and service categories, the total number of hours must be 20 and 32.

To be reported as a service activity sponsored by Beta Alpha Psi, the event either (1) must be organized and carried out by the Beta Alpha Psi chapter or (2) must involve participation by the members of the Beta Alpha Psi chapter as a group (in which case the chapter has agreed to participate as a chapter and has promoted participation in the event). Any money received from a service activity must be donated to a charitable organization or used for a charitable cause. Activities for which members receive course credit (with the exception of VITA) are not considered service activities.

A definition and examples of service activities are provided below.

Definition of Service Activities

Since part of the mission of Beta Alpha Psi is to foster enthusiasm for service, chapters are encouraged to participate in campus and community service activities. The service category is intended to be flexible and adaptable to the needs and desires of individual chapters.

Service is the giving of one’s time, energy and talents to benefit either the campus or local community. Community service involves making a difference to these entities through the actions of caring for others by the chapter and/or its members and includes direct service or indirect service. Direct service means becoming actively involved with a community group or organization (either on or off campus). Indirect service means providing help or resources through a “round-about” approach and includes preparation time for charitable events, raising funds for charity, or assisting with “back office” functions such as accounting or computer systems. In evaluating community service, we suggest that the chapter consider the following questions.

How does this activity benefit the member/candidate?
 How does this activity benefit the organization/individual(s) being assisted?
 Why are we (am I) doing this?

Activities that do not constitute community service include assisting friends or family or volunteering to participate in events where the underlying purpose is recruitment. Any money received from a service activity must be donated to a charitable organization or used for a charitable cause. Activities for which members receive course credit are not considered service activities.

Examples of Service Activities

Habitat for Humanity	Recordings for the Blind
Big Brothers/Big Sisters	Junior Achievement
Fund raising projects for charity	University Telethons
Food drives	Adopt-a-highway, Adopt-a-trail, Adopt-a-family
Service activities sponsored by religious organization	Blood drives
Walk-a-thons, bowl-a-thons, etc.	Coaching youth teams
Assisting the Career Placement Office with a Career Fair	Financial Literacy event
<p>Volunteer Income Tax Assistance - VITA training time should be counted as professional hours and VITA tax preparation time should be counted as service hours, regardless of any academic credit earned. Each chapter that reports VITA as a service activity will be required to submit the VITA Summary Report to the IRS. You can find the report here: https://www.bap.org/volunteer-income-tax-assistance.</p>	
<p>Proctoring exams for department (for example, proctoring a common final at the end of the semester, not proctoring an exam for an individual professor)</p>	
<p>Host Annual Meeting, Community Service Day, or Regional Meeting- Hours will be determined by the Meeting Chair, Chapter Advocate and/or sponsoring University</p>	
<p>Tutoring sessions - group, e-mail, or one on one - without monetary compensation. Tutoring sessions count if the sessions were scheduled and are documented, regardless of whether anyone attends. Please report this activity as</p>	

a single service activity per semester on the mid-year and/or end-of-year workbook

Consultation with campus or off-campus organizations about tax matters, bookkeeping, information systems, or other work of a technical nature

Mentoring of other chapters (a chapter must receive pre-approval of its Chapter Advocate)

Create/update chapter web page (to a maximum of 10 hours for creating and 3 hours for updating)

Officers and committee chairs for a chapter may receive up to 10 hours for their time providing service to the chapter. A maximum of 10 hours each may be reported for up to 10 officers and committee chairs. Please report this at the end of each semester or at the end of the year on a single report. The limit of 10 is for the year, not by semester or quarter.