

Best Practices:

A Procedure Manual for Best Practices

sponsored by

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Program Summary

"Best Practices" are activities created and completed by a chapter to further specific goals identified by the Board of Directors of Beta Alpha Psi and by Deloitte LLP (Deloitte). These activities exemplify the spirit and purpose of Beta Alpha Psi and, if applicable, allow other chapters to emulate those activities. Occasionally, the Board of Directors asks chapters for their vision regarding a future activity/issue/topic; such vision must be created by the chapter but cannot be completed nor emulated. Multi-year submissions are accepted, however a strict emphasis on enhancements and statistical description of improvements are used to determine eligibility and overall competitiveness.

Deloitte has been the proud sponsor of the Best Practices program since 2001. The program encourages students to develop and execute programs, which promote awareness and student involvement in projects exemplifying values shared of Beta Alpha Psi and Deloitte. Each year the President Elect and the Deloitte Forum Member select topics to capture and promote the shared values. Topic examples include: ethics, corporate responsibility, diversity, increasing awareness of the accounting profession, skills-based volunteerism, and globalization. To date chapters have completed over 1,000 individual and team presentations and have been awarded over \$300,000 to support chapter operations, scholarships, and continuation of best practices projects.

Best Practices comprises a two-step competitive process.

1. Chapters submit an abstract and the abstract is approved.
2. Chapters make a presentation at their Regional Meeting. Winning chapters (1st, 2nd, 3rd place): (1) receive verbal recognition and monetary awards and, (2) the first place teams present at BAP'S annual meeting. Winning chapters at the annual meeting earn verbal recognition and additional monetary awards.

This document is organized by topic and timeline format for each responsible party (see Section 3- "Roles & Responsibilities").

Awards

Deloitte funds all Best Practices competitions. The Board of Directors and Deloitte set award levels, which are non-negotiable; the Executive Office mails monetary awards to the chapters.

At each regional meeting, there is a possibility of a first, second, and third place award for each Best Practice Category (see section 2- "Current Topics" for categories). However, if the judges determine presentations within a topic do not merit an award, an award does not have to be given, or an Honorable Mention can be awarded.

See table below for monetary award levels. Honorable mention awards do not receive monetary awards.

Deloitte Best Practices Award Summary* (each topic presented)				
Level of Competition	1st	2nd	3rd	Total Awards
Regional Meeting (8)	\$ 500	\$ 250	\$ 125	\$21,000
Annual Meeting (1)	\$ 1,000	\$ 1,000	\$ 1,000	\$9,000
<i>* Honorable Mention designations do not receive monetary awards</i>				\$30,000

Timeline of Events

Spring (1 yr prior to RM) BAP President Elect proposes Best Practice (BP) topics

Fall (prior to RM) Forum Chair designates **Forum Liaisons**

August -January Forum Liaisons form judging teams for regional meetings (RM)

Chapters determine topics to participate in, execute project, and prepare abstracts

Host Chapter designates Best Practices Coordinator

(40 days prior to RM) **Chapters** submit abstracts to **Chapter Advocate**

40 days prior to RM Chapter Advocate forwards abstracts to **Forum Liaison**

30+ days prior to RM Forum Liaisons evaluate abstracts

(30 days prior to RM) **Forum Liaisons** complete/submit eligibility evaluations to **Chapter Advocate**

Chapter Advocate communicates eligibility to **chapters (Prior**

to RM) **Chapters** prepare Best Practices presentations **One**

week prior to RM Host Chapter schedules presentations

Day of BP Competition (RM) Chapter Advocate communicates judging expectations to BP judges

Judges attend briefing to evaluate presentations, determine winners (rankings)

Host Chapter submits rankings to Chapter Advocate and prepares certificates

(One week after RM) (award recipient) **Chapters** report results to Beta Alpha Psi Executive Office

(May 1 after RM) 1st Place winners notify **National BP Coordinator** of intention to compete at annual meeting

May 15 (prior to Annual Mtg) National BP Coordinator notifies Executive Office of all participants

BP Coordinator begins preparing judging materials

Roles and Responsibilities

Beta Alpha Psi President Elect

1. Spring (1 year prior to RM): Propose Best Practices Topics

The incoming president of Beta Alpha Psi (BAP), after consulting with Deloitte and the Board of Directors, proposes Best Practice topics.

Guidance

- Topics presented to the Deloitte Forum Member include the following example areas: ethics, corporate responsibility, diversity, financial literacy, skills-based volunteerism, or globalization.
- Provide topics to the Executive Office prior to February 1 for the following academic year to ensure chapters have time to begin planning activities or conducting research during the summer period.

Forum Liaison & Forum Members

1. Fall (prior to RM): Designate Forum Liaisons

The Forum Chairperson designates one Forum Member to act as the Forum's Liaison to each regional meeting. The liaison forms judging teams and reviews the abstracts from chapters to determine eligibility for the regional meeting Best Practices.

Guidance

- Forum Chairperson appoints Forum Liaisons not later than August of the year preceding the regional meetings.

2. August -January: Form Judging Teams for Regional Meetings

The Forum Liaison forms judging teams for each Best Practice category composed of Forum Members or Board of Directors attendees. Judging teams must include the Alumni Representative, any Board member and Deloitte Forum representative. Announce judging teams (names, email addresses, phone numbers, and employer) to the Chapter Advocate and Host Chapter no later than 30 days prior to the regional meeting.

Guidance

- If insufficient Forum members are available, other Board members may judge ensuring no affiliation or direct connection with any schools participating in the competition. Chapter Advocates must not participate at their regional meeting.

3. (30+ days prior to Regional Meeting): Forum Liaisons Evaluate Abstracts

- The Forum Liaison evaluates each abstract to determine eligibility outlined in Appendix D.

Guidance

- Forum Members evaluating abstracts should direct questions initially to the Chapter Advocate, not the submitting chapter.

4. (30 days prior to the Regional Meeting): Complete and Submit Eligibility Evaluations

The Forum Liaison, no later than 30 days prior to the start of the regional meeting, returns each evaluation sheet to the Chapter Advocate regarding eligibility for competition. See Appendix D for evaluation sheet. The Chapter Advocate advises each submitting chapter and the host chapter regarding eligible to compete.

5. (Day of Best Practices Competition):

Attend Judge Briefing, Judge / Evaluate Presentations, Determine Winners

The Chapter Advocate and Forum Liaison meet with judging teams to explain the process and ensure the use of consistent judging standards. The Chapter Advocate will provide abstract and presentation guidelines, and evaluation sheets before the competition begins (see Appendix A, C, E & Appendix F). Please note it is not mandatory to award a 1st, 2nd, and 3rd place award. If the judges determine a presentation does not merit an award, one does not have to be given, or an Honorable Mention can be awarded.

Guidance

Judging teams will be asked to:

- Evaluate the abstract before the presentation. Prior to the presentation, the Forum Liaison emails the abstract to the judges. Judges read and evaluate using an evaluation worksheet provided in appendix E. (NOTE: There will be insufficient time on the day of the presentation to perform this function.)
- *Evaluate the presentation itself*, using an evaluation worksheet provided by the Chapter Advocate.
- Rank the entire submission. Combine the abstract and presentation evaluations and rank all submissions. In evaluating both items, consider the following guidelines:
 - To what degree were the category's goals achieved?
 - The evaluation worksheet provided is not meant to be definitive. Judges evaluate the stated components and use the results of the evaluation criteria in their deliberations.
 - Rank submissions as first, second and third place. If the judges conclude that no submission in their category warrants a first place finish, they may award only a second and/or third place finish. Ties for second and third place finishes are permissible, however, there may be only one first place winner. Ties split the monetary awards equally.
- As soon as possible after determining rankings, the judging team moderator must provide the Chapter Advocate with any documentation/checklists used to rank the Best Practice unless the judging team member retains it.

Chapter Advocate

1. (40 days prior to Regional Meeting): Collect Abstracts

Chapters submit cover pages (see Appendix B) and abstracts to the Chapter Advocate via email no later than 40 days prior to the start of the regional meeting. Abstracts received after that date will be ineligible to receive verbal and monetary awards at the regional meeting.

Guidance

- Under no circumstances should an abstract be sent to any other entity, including the Host Chapter.
- If an abstract is submitted to any other party accidentally, the Host Chapter must not read the submission and inform the Chapter Advocate of the situation. This requirement avoids any appearance of unfair advantage being gained by a Host Chapter who is also participating in a Best Practice competition.

2. (40 days prior to Regional Meeting): Forward Abstracts to Forum Liaison

Chapter Advocate forwards via email: 1) requirements of each Best Practice category, 2) an initial evaluation sheet for each abstract, and 3) all abstracts received to the Forum Liaison.

3. (No later than 30 days prior to Regional Meeting): Communicate Eligibility to Chapters

Based on the evaluation of the Forum Liaison, the Chapter Advocate advises each *submitting* chapter and the Host Chapter the eligibility to compete decisions.

4. (Day of Best Practices Presentations)

Communicate Expectations to Judging Teams

Prior to the presentations the Chapter Advocate distributes this procedures manual. The Forum Liaison and Chapter Advocate meet with judging teams to explain the process ensuring consistent standards and answer any questions. The Chapter Advocate provides abstracts, presentation guidelines and evaluation sheets to judges before the competition begins (see Appendix A, C, E & Appendix F).

Guidance

- Lead judges provide the Chapter Advocate and the Host Chapter with the identity and rankings of each Best Practice submission. The Host Chapter or conference planner prints the award certificates; no mention of award winners are noted prior to the official award announcements.
- First place winners earn the right to compete in a Best Practice competition at the annual meeting (see below for further details).
- Judges act independent of any student, college/university, and chapter affiliation. Judges make themselves available to provide feedback on content and/or the presentations future planning. Results, once submitted to the Director at Large, are final.

5. (Day of Best Practices Presentations)

Announce Winners

During closing remarks, the Chapter Advocate provides the list of winners to the Deloitte representative (Forum, Board, or other chosen attendee) who announces the winners in each Best Practice category. Please see announcement script at Appendix G.

Host Chapter

1. (September -January prior to RM): Designate Best Practices Coordinator

Each Host Chapter designates at least one student to manage and coordinate the Best Practices presentation process and maintain communications to participating chapters, forum liaison, and Chapter Advocate.

Guidance

- The Host Chapter(s) inform and remind (see Regional Meeting Manual) chapters, the Forum Liaison, Chapter Advocate and judging teams regarding policies, procedures and deadlines for abstract submissions including, as a minimum, the following:
 - Name and email/mail address of the Chapter Advocate.
 - Date abstracts must be submitted to the Chapter Advocate.
 - Date is 40 days prior to the first day of the regional meeting.
 - Under no circumstances must an abstract be sent to any other entity, including the Host Chapter (s). If done so accidentally, the Host Chapter must not read the submission and inform the Chapter Advocate of the situation.

2. (One week prior to Regional Meeting): Schedule Best Practices Presentations

The Host Chapter schedules presentations in each Best Practice category simultaneously in separate rooms.

- If all the presentations in a given category cannot be scheduled in one time period, then schedule the remaining presentations in the following time period to ensure consecutive scheduling of presentations in the shortest time possible.
- Ensure computer software and hardware is available and functioning in each presentation room.
- Ensure all presentations are loaded on supporting hardware/computers and are accessible prior to session, which minimizes the transition time between presentations.
- Allowed visual aids include: handouts, poster board, props, PowerPoint, etc. PowerPoint presentations are limited to slides and photos only. Web access and added Audio/Visual (AV) requests will not be accommodated.
- Provide one or more moderators for each session. Moderators introduce each presenting chapter, time each presentation, terminate each presentation if it exceeds 10 minutes (including Q&A), and close the session.
 - If time is available after all presentations, judges may call upon additional Q&A for the presenters

3. (Day of Best Practices Competition): Submit Rankings of Competition/Prepare Awards

The Host Chapter provides the identity and rankings of each Best Practice submission by the Chapter Advocate. The Host Chapter or conference planner prepares the award certificates and does not disseminate this information to anyone prior to the official award announcements.

Guidance

- The Host Chapter prepare some evidence of placing first, second or third which typically includes a framed certificate.
- The Host Chapter includes the Best Practices information in its final report (see Regional Meeting Manual for details.) due within seven days after the meeting. This information includes:
 - Chapter name and number
 - Best Practice category and place (1st, 2nd, and 3rd)
 - Complete address to send the monetary award to
 - Names and email address of the Faculty Advisor and each presenting member

Participating Chapters

1. (Feb - May prior to RM-Spring of RM)

Determine Best Practice Projects, Plan & Execute Event, Write Abstract(s)

Participating chapters determine which categories they will compete shortly after announcement of the Best Practice categories. Chapters might find designating a committee, ideally before the summer break allows them to conduct the appropriate research and formulate plans. The substance of their work and efforts is summarized in an “abstract.” An abstract summarizes the the presentation made at the Regional meeting. A PowerPoint presentation is NOT an abstract. Please see Appendix A for Abstract Guidelines and Appendix B for the Abstract Cover page.

2. (40 days prior to Regional Meeting) Submit Abstract(s)

Participating chapters write one abstract for each Best Practice category they present. Occasionally, a Best Practice category may have two or more sub-topics; therefore, chapters may participate in only one of the available sub-topic categories. Best Practice instructions issued by the Host Chapters must clearly state this limitation, when applicable. Chapters submit a cover page (see Appendix B) and the abstract to the Chapter Advocate by email not later than 40 days prior to the start of the regional meeting. Abstracts received after that date will be ineligible to receive verbal and monetary awards at the regional meeting. Chapters will receive notification their abstracts were received and acceptance. Contact the Chapter Advocate with any questions or concerns.

Guidance

- The abstract must not exceed one page (excluding the cover page), be in good form and free of grammatical and spelling errors. Chapters can find sample abstracts from the prior year’s Best Practice annual meeting competition on the Beta Alpha Psi website (www.bap.org).

3. (Prior to Regional Meeting, If eligible) Prepare presentation

If eligible, the submitting chapter prepares a 10 minute presentation (includes Q&A) based solely on the information found in the abstract. Adding new information nor deleting any information in the abstract is not allowed. Please see Appendix C for Presentation Guidelines.

4. (At least 25 days prior to Regional Meeting, If ineligible) Prepare presentation

If ineligible, the submitting chapter may, still present its activities/ideas at the regional meeting. However, it will not be eligible for verbal and monetary awards and will thus not be eligible to compete in the annual Best Practice competition. The ineligible chapter must inform the Chapter and the Host Chapter of its decision to present not later than 25 days prior to the beginning of the regional meeting to facilitate scheduling; otherwise, it will be ineligible to make a presentation.

5. (Day of Best Practices Presentations) Set Up Presentations

Guidance

Submitting chapters must:

Bring their presentation materials on a flash drive and provide it to the Host Chapter representative in sufficient time for it to be loaded onto the hardware/computers in the presentation room prior to the presentation. Please note PowerPoint presentations are limited to slides and photos only. Web access and added Audio/Visual (AV) requests will not be accommodated or permitted.

- Position any other supporting material in the presentation room prior to the Best Practice competition.
- Present their activity/idea within 10 minutes (includes Q&A). If time is available after all presentations have been delivered, judges may call upon additional Q&A for the presenters
- Presentations must be made only by the student members of the chapter (no faculty advisors or non BAP members/candidates).
- Submitting Chapters may desire to give their presentation in a region other than its own. If so, that chapter must coordinate directly with the Host Chapter of that region. Such presentations will not be eligible for verbal or monetary recognition.

No videotaping of presentations is allowed. Also, note faculty advisors may not ask their presenting chapter questions during the Q&A presentation time.

Note Regarding Judging Results:

The Forum Liaisons select judges independent of any student, college/university, and chapter affiliation. These judges are given the procedures and policies of the program and are expected to act accordingly to judge the presentation based on pre-set guidelines. While judges are available to give feedback on content and/or the presentations for future planning, their results, once submitted to the Chapter Advocate, are final.

6. (Within one week after presentation, if winner) Report Results to Host Chapter

Submitting chapters report one Reaching Out Activity (ROA), regardless of the number of presentations given. Each presenter reports one professional hour for his/her effort.

Guidance

Within seven days of the regional meeting, winning chapters (1st, 2nd, and 3rd place winners) must provide the Host Chapter via email with:

- Chapter name and number
- Best Practice category and place (1st, 2nd, and 3rd)
- Complete address to which the monetary award should be sent
- Names and email address of the Faculty Advisor and each presenting member
- Electronic package containing: 1) Cover Page originally submitted to Chapter Advocate, 2) Abstract, 3) PowerPoint presentation. This will be loaded onto the Best Practices website to showcase award-winning projects.

Annual Meeting Procedures

Eligibility to Compete

All regional meeting Best Practice winning **CHAPTERS** who achieved a first place award are eligible to compete in the best practices competition at the annual meeting.

The Annual Meeting Chairperson designates a Best Practice Coordinator. The **EXECUTIVE OFFICE** ensures the identity and contact information of the Coordinator is provided to all Directors and **HOST CHAPTERS** by February 1. Regional meeting **HOST CHAPTERS** must include that information in all correspondence to all **CHAPTERS** registered.

As soon as possible after receiving a first place award but not later than May 1, winning chapters must:

- Notify the Best Practice Coordinator of its intention to compete at the annual meeting;
- If the chapter desires to compete, provide a copy of its presentation abstract, including cover page, to the Best Practice Coordinator. Regarding those abstracts, winning chapters must:
 - Revisit the abstract guidelines at Appendix A.
 - Amend/update the cover sheet as needed to include annual meeting presenters and contact information,
 - Amend the abstract. The abstract itself must essentially be the same as provided for the regional meeting. While minor editorial/grammatical changes and reordering of major points are permissible, under no circumstances must new information be inserted into the abstract (or presentation).

The Coordinator must provide to the **EXECUTIVE OFFICE** not later than May 15th the identity of and categories in which all winning chapters intend to compete to ensure adequate facilities are scheduled at the annual meeting.

Planning for the Presentations

The **EXECUTIVE OFFICE** and/or the Annual Meeting Chairperson, in conjunction with the Best Practice Coordinator, must:

- Schedule the Best Practices sessions to occur as early as possible after the morning or lunch sessions to allow chapters to adequately prepare.
- Include the location, time and date of each Best Practice competition in the Annual Meeting instructions (and web page). Ensure functioning computer and projection hardware are in

place at least one hour before the scheduled competitions.

- Ensure a qualified person is present at the designated time in the room prior to the presentation to assist in loading presentation software/programs. Exact information as to the time the computer(s) will be available to load the presentation will be communicated to the presenting chapters prior to the annual meeting by the Best Practices Coordinator.
- Determine the order in which presentations will be delivered. Such order must be determined randomly.

Planning for Judging the Presentations

The **FORUM LIAISON** must, 30 days prior to the meeting:

- Compile a list of **FORUM** members wishing to judge best practice competitions, including one Deloitte Representative.
- Form judging teams of at least three persons for each Best Practice category.
- Distribute this Best Practices Procedures manual to each judge to familiarize themselves with the program. (Abstract and presentation guidelines and evaluation sheets will be provided to judges by the Chapter Advocate before the competition begins (see Appendix A, C, E & Appendix F)
- Designate a judging team member as the lead judge. This person should have prior Best Practices judging experience and must not have judged same Best Practice category at any regional meeting. Lead Judge responsibilities are discussed below.
- Provide the **EXECUTIVE OFFICE**, Best Practice Coordinator, and Annual Meeting Chairperson with the names, email addresses and phone numbers of each judge. (The **EXECUTIVE OFFICE** must include the names and company affiliations of judges in its meeting program.)

The Best Practice Coordinator, in conjunction with the Forum Liaison, Executive Office, Annual Meeting Chair, must:

- Prepare a packet for each judge that includes:
 - This Best Practices Procedures Manual
 - The goal and guidelines for each Best Practice category.
 - The abstracts from competing chapter.
 - The Evaluation forms for each scheduled presentation. NOTE: While evaluation forms may be modified at the judge's discretion from those used at the regional meeting, regional meeting evaluation forms must nevertheless be included in this packet as a reference.
- Distribute the packet to all judges prior to the meeting's opening session, allowing judges to familiarize themselves with the forthcoming presentations.

NOTE: There is insufficient time at the meeting itself to fully review all abstracts and familiarize one's self with all judging guidelines/procedures/responsibilities. It must also be communicated to the judges that when submitting the overall rankings of the presentations, it is not mandatory to award a 1st, 2nd, and 3rd place award. If the judges determine a presentation does not merit an award, one does not have to be given, or an Honorable Mention can be awarded.

The Lead Judge must:

- Designate a moderator, timer and door guard for each completion.

- The moderator (if not the lead judge) announces each presenting school.
- The timer ensures no presentation extends beyond 10 minutes (time includes Q&A). If time is available after all presentations have been delivered, judges may call upon additional Q&A for the presenters.
- The door guard must ensure no one enters or exits a presentation while it is in process. Entrance or exit between presentations is permissible.
- Meet with his/her team members informally prior to the competition to answer questions and ensure procedures and responsibilities are understood. See the competition below for more details concerning the judging process.
- Report the competition results to the Best Practice Coordinator on the Script for Announcement of Winners (Appendix G).

The Competition

Presenting chapters must:

- Determine when and where their presentation will be given.
- Deliver all presentation-related materials (including their presentation on a flash drive) to the appropriate location at the designated time prior to the scheduled presentation.
- Competing chapters must present the substance of their efforts or vision as summarized in their abstract within ten minutes. The presentation must be professional in nature.

When a presentation ends, sufficient time must be given for the audience to ask questions. Questions should not continue beyond five minutes. Before beginning the next presentation, the Moderator must ensure the judging team is ready for the next presentation. Faculty advisors are not permitted to ask questions of their own presenting team, and no video taping is allowed.

Judging teams must record their individual observations about each presentation. Summarizing the annual meeting evaluation form instructions:

- *Evaluation Form* - A generic evaluation form will have been provided as guidance. The criteria on this form conveys the general goals of the Board for the Best Practices competition. However, it is NOT meant to be a definitive piece of work encompassing every aspect of the broad range of presentations and activities judged, nor does it provide omnipotent judgment as to the weighting of these factors. At best, any evaluation of this type of presentation is a subjective measure allowing the individual judge some discretion in the applicability and weighting of the criteria to establish their competitive rankings.

After Presentations are Completed

Judging teams, under the guidance of the lead judge meet privately to evaluate all presentations. After determining first, second and third place winners; the lead judge informs the Best Practice Coordinator of the winners on the Script for Announcement of Winners (Appendix G).

In turn, the Coordinator must inform the **EXECUTIVE OFFICE** and **DELOITTE REPRESENTATIVE** (Forum, Board, or other chosen attendee) of all winners by submitting a completed "Script for Announcing Winners"- see Appendix G.

The **EXECUTIVE OFFICE**, in conjunction with the Best Practice Coordinator, prepares the necessary certificates and, as soon thereafter as possible, forwards the monetary awards to those chapters (currently \$1,000 funded by Deloitte). Certificates must be provided to the Annual Conference Chairperson or his/her designee. A listing of all winners and certificates will be given to the Deloitte representative (Forum, Board, or other chosen attendee) via a completed "Script

for Announcing Winners" (see Appendix G) to announce the winners in each Best Practice category.

After the awards are presented at the closing ceremony, judges must make themselves available to provide. Judges must retain their evaluations until it is apparent they are no longer needed.

The decision of the judges is final. Presenting chapters who seek comments from the judges must accept that feedback as constructive and unchangeable.

Appendix A:

Best Practices sponsored by

Abstract Guidelines

The abstract must be a one-page summary of the most important aspects of your project/idea. It must concurrently be a summary of your intended presentation. The following guide illustrates the proper format for a Best Practices abstract.

Required Content- Each abstract submitted contains the following standard paragraphs clearly addressing the points below:

1. Statement directly addressing a Best Practice category provided by the national office.
2. An outline of the project
 - Goals of the project
 - Outcomes or expected outcomes if the project is yet to be completed at the time of the regional meeting
3. Member involvement
 - Number of members participating in the project
 - Description of non-member participants and their roles
 - Member hours spent on project
4. Project Assessment
 - An assessment of the benefits to the chapter and others served by the project (i.e., lessons learned, etc.)
 - Addresses what effects the project had, or will have, on the community, chapter members, BAP, etc.
 - A description of any copyrighted material used in the presentation.
 - *(If a multi-year project is submitted)* Emphasis on enhancements and statistical description of improvements from previous two years

Writing Component – Each abstract must convey professionalism and will be evaluated using the following guidelines.

5. Abstract is free from mechanical errors (grammatical, spelling, etc.)
 - The abstract is well edited and polished.
6. Material is arranged in logical sequence
 - Ideas are well organized and conveyed in a well-defined structure. This structure must include clear title, introductory, body, and conclusion sections.
 - Underlying ideas and themes are summarized to leave the reader with a clear idea of what your abstract conveys.
7. Writing style conveys professionalism.
 - Writer uses a professional writing style.

Appendix B:

****Each abstract submitted must have a cover page attached containing the following information****

Abstract Cover Page for Best Practices

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Greek name/number of SUBMITTING CHAPTER
Official school name
Best Practice category to which the abstract applies
Is the project a multi-year submission (was submitted in prior years)
Student (with email address) to contact regarding this abstract_
Faculty Advisor's name, email address, and phone number

Copyright statement

The following copyright material is included in this abstract (and will be used in our presentation).
Permission has been received from the copyright holder to use the related information.

(List each copyright protected item used in the abstract)

Complete name and address to mail awards if and when earned _____

Names of students that will be making the presentation. _____

Appendix C:

Best Practices sponsored by

Presentation Guidelines

These guidelines are intended to help chapters present a professional presentation at the regional meeting, which will showcase your chapter's idea/project

General Guidelines

1. The presentation must be a professional presentation, and convey the idea / project clearly
2. The presentation may include various forms of visual aids (audio, handouts, poster board, props, PowerPoint, etc.) to help communicate your project to the audience.
 - o **Note:** Presenters must be prepared to present in the event of any technical difficulties (i.e any supplementary electronic support systems not work)
 - o PowerPoint presentations are limited to slides and photos only. Web access will not be allowed and added Audio/Visual (AV) requests will not be accommodated.
3. All firm/corporate/professional-copyrighted logos must not be included in presentations without proper approval.

Required Content

1. Focus on **one** idea/project fitting under the selected Best Practices category.
 - o Informative beginning (Introduction of presenters and topic)
 2. Presentation must address relevant points discussed in the corresponding submitted abstract
 3. The presentation must include evidence of the success of your project when appropriate.
 - o At a minimum, the project must be something your chapter is doing in the current year (not just a great idea, but something the chapter is actually doing).
 - o (*If a multi-year project is submitted*) Emphasis on enhancements and statistical description of improvements from previous two years
 4. Presentations are strictly limited to 10 minutes (includes Q&A).
 - o Any and all presentations extending beyond 10 minutes will be stopped and the violation will be noted in the presentation evaluations.
 - o If time is available after all presentations, judges may call upon additional Q&A for the presenters
- Faculty advisors are not permitted to ask questions of their own chapter's presenters.
No video taping is permitted of the presentations

Appendix D:

Best Practices sponsored by

Eligibility Evaluation Form

(To be distributed only to judging team members)

SUBMITTING SCHOOL

Category

1. In consideration to the applicable topics detailed in Section 2 "Current Topics" were the topic's requirements fulfilled? (to be completed by the FORUM Liaison)

REQUIREMENTS	YES	NO	NOT APPARENT
Does the project address the respective topic?			
Was the project completed? <i>(if applicable)</i>			
Was the project successful?			
Was the program developed by the chapter <i>(as opposed to by others)</i> ?			
Does the project involve widespread member involvement?			
Is the project applicable / transferrable to other chapters? <i>(If multi-year project) Was there emphasis on enhancements and statistical description of improvements from previous two years?</i>			

Appendix E:

Best Practices sponsored by Deloitte

Abstract Evaluation Form

SUBMITTING SCHOOL _____

CATEGORY _____

ABSTRACT - Please rate projects using a scale of 0-5, using the scale below as a guide

5 = Excellent, practically void of any issues/problems

3 = A few problems/issues/deviations; average

1 = Below expectations but at least acceptable

0 = Does not meet minimum acceptable requirements

	YES	NO
	(scale of 1 - 5)	0
Evaluation of Idea and Results		
<i>Consider the following points in your evaluation:</i>		
Goals of the project. (relevant, meaningful, show originality of thought)		
A narrative description of member and nonmember activities		
A quantified description of member and nonmember participation (numbers/hours, etc.)		
Description of actual or expected outcomes		
An assessment of the immediate and/or future benefits to the chapter/others		
Adaptability to other chapters		
(If multi-year project) Emphasis on enhancements and statistical description of improvements from previous two years		
Evaluation of Writing Component		
<i>Consider the following points in your evaluation:</i>		
Presents material in a logical sequence		
Free of grammatical errors		
Includes a concrete conclusion/end		
Written in a professional style		
Shows clarity of thought		
TOTAL POINTS		

Appendix F:

Best Practices sponsored by Deloitte

Presentation Evaluation Form

SUBMITTING SCHOOL _____

CATEGORY _____

PRESENTATION - Please rate projects using a scale of 0-5, using the scale below as a guide

5 = Excellent, practically void of any issues/problems

3 = A few problems/issues/deviations; average

1 = Below expectations but at least acceptable

0 = Does not meet minimum acceptable requirements

	YES Scale of 1 - 5	NO 0
Evaluation of Content: Consider the following points in your evaluation:		
Chapter involvement (number of participants and hours)		
Conclusions/outcomes/benefits clearly stated		
Time used was appropriate to the topic and within 10 minutes		
Asked for questions/comments and responded convincingly and thoroughly		
Matched the content of the abstract		
(if applicable) Multi-year project emphasized enhancements from prior years using description and statistics		
Evaluation of Delivery: Consider the following points in your evaluation		
Speaker animation/enthusiasm/energy, i.e., convincing		
Appropriate use of technology (within guidelines of use)		
Quality of presentation aids used (hand-outs, multimedia, PowerPoint, graphics)		
Eye contact (void of reading notes)		
TOTAL POINTS		

Notes:

Appendix G:#

Best Practices sponsored by Deloitte

Script for Announcement of Winners

My name is (insert name here). On behalf of Deloitte, we thank Beta Alpha Psi for allowing Deloitte to sponsor the Best Practices Competition, and thank you to each of the participants today for your dedication to your chapters and communities.

Deloitte has been the proud sponsor of the Best Practices program at both the regional and national levels since 2001. Their sponsorship of this program is intended to encourage students to develop and execute programs that promote awareness and student involvement in projects that exemplify values shared by Beta Alpha Psi and Deloitte. These values are captured and promoted through the topics announced each year revolving around ethics, corporate responsibility, diversity, increasing awareness of the accounting profession, skills-based volunteerism, and globalization.

To date, there have been over 1,000 individual and team presentations at the regional and national levels and over \$300,000 awarded to Beta Alpha Psi chapters to support chapter operations, scholarships, and the continuation of best practices projects.

Each chapter had the opportunity to compete in the mid-year meeting competitions, and each first place winner will be invited to compete in the national meeting. To all the competitors- congratulations, you have all done a great job- thank you for all of your great ideas. Thank you as well to all the Advisory Forum and any Board Members that judged these presentations. And now for the winners:

Category #1- (*insert category title*)

Third	Place	goes	to:
Second	Place	goes	to:

The First Place winner is: _____

Category #2- (*insert category title*)

Third	Place	goes	to:
Second	Place	goes	to:

The First Place winner is: _____

Category #3- (*insert category title*)

Third	Place	goes	to:
Second	Place	goes	to:

The First Place winner is: _____

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