HONOR THE PAST AND EMBRACE THE FUTURE

2020 Beta Alpha Psi Annual Report
# 2020 Beta Alpha Psi Annual Report

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To review the Beta Alpha Psi audited financials, visit: bap.org/2020-annual-report
**VISION STATEMENT**

Beta Alpha Psi will shape the financial and business information professions by developing members into ethical, professional and confident leaders.

**MISSION STATEMENT**

The mission of Beta Alpha Psi, the premier international honor and service organization for financial and business information students and professionals, is to inspire and support excellence by:

- encouraging the study and practice of accountancy, finance, business analytics or digital technology;
- providing opportunities for service, professional development and interaction among members and financial professionals; and
- fostering lifelong ethical, social, and public responsibilities.

**LETTER FROM THE EXECUTIVE DIRECTOR**

Dear friends,

As I reflect upon the year 2020, three words come to mind; disruption, adaptability and gratitude.

**Disruption** — We began 2020 with three successful in-person regional meetings and within a few weeks, we heard about a dangerous virus that was spreading rapidly all over the globe and our organization faced the daunting decision to cancel the remaining six meetings. The COVID-19 disruption affected us all and every aspect of our lives. Work, study and social lives were moved and mandated to our homes. Everything came to an abrupt halt. One thing that did not stop was the value Beta Alpha Psi has committed to our members for the past 100 years. We were not going to allow the value of our chapter programs, the regional and annual meetings be paused as we faced this disruption.

**Adaptability** — Within a few weeks, the AICPA/Beta Alpha Psi staff, Chapter Advocates and our Professional Partners established a virtual meeting template and we were able to hold five virtual regional meetings. We worked closely with our competition sponsors for Best Practices, Superior award seeking chapters, Ethics, Inclusive Leadership and Project Run With It to rethink the submission process and allow chapters to participate virtually. We are sincerely grateful to the AICPA, Deloitte, EY, Grant Thornton, IMA, KPMG Foundation, Moss Adams and RSM US for their flexibility this year to our chapters and students.

Most schools shifted from in-person to online classes. Almost all of our chapters were not able to meet in-person during their spring semester. Our Professional Partners came through by providing free professional development webcasts and webinars for our candidates and members to access during the quarantine. We adapted our award status so that chapters could still report hours and activities and still be eligible to achieve award status.

Then, the BAP Board of Directors faced the hard decision to cancel the 2020 Annual Meeting in Orlando, FL. We had to keep our students, faculty and volunteers safe. We continued our commitment to BAP’s mission to provide professional development and opportunities for networking and community service to our chapters. I am so proud to share that we conducted a three-hour live virtual meeting where we featured two keynote speakers (USA Gold Medalist, Laurie Hernandez and Surgent Professional Education, Ryan Hirsch), a full presentation on Community Service, along with the introduction of the Giving Back in the Next 100 Years Initiative, and a live virtual initiation where 39 new members were initiated! In place of the Annual Meeting Professional Sessions, our professional partners came through by providing over 22 pre-recorded sessions that all candidates and members can access on our website through the end of December 2020. The professional partners provided over 130 hours of free CPE courses to our faculty advisors for 30 days. Beta Alpha Psi is sincerely grateful to our Professional Partners for all of their contributions and their commitment to our students, faculty and organization.

**Gratitude** — This was a group effort by many and I thank the BAP staff, Board of Directors, Chapter Advocates, our Professional Partners and all of the volunteers for their resilience to face the disruption by adapting to the constant changes around us and proving that the value to our students can never be halted, even during a global pandemic. Thank you all for an amazing 2020!

Respectfully,

Margaret Fiorentino
Executive Director, Beta Alpha Psi
HONOR THE PAST AND EMBRACE THE FUTURE

Our theme for the beginning of Beta Alpha Psi’s Second Century was “Honor the Past and Embrace the Future.” When we developed that theme, we had no idea how different our future would become.

EMBRACE THE FUTURE

During our 101st year, we had many “firsts” for our organization. For example, we held our first “Virtual Regional Meeting” (in fact, we held Virtual Regional Meetings in six of our regions during the year), and many of our chapters went from holding chapter meetings on campus to having their chapter meetings online.

We also held our first Virtual Annual Meeting, which had over one thousand registered participants. This year’s annual meeting offered a combined virtual format, which included both a live session on Thursday, August 6th and offline virtual pre-recorded sessions. The live session included keynote addresses by Laurie Hernandez (“Advice from an USA Olympic Gymnast”) and Ryan Hirsch (“How Do I Network in a Virtual World?”). Our professional partners provided over 22 pre-recorded sessions that our chapters (candidates and members) will be able to use (for free) during the fall 2020 semester. Our professional partners also offered over 130 hours of free CPE courses to our faculty advisors for a time-period during and after our Annual Meeting.

As part of the 2020 BAP Virtual Annual Meeting, we also held our first Virtual BAP Community Service Day, KPMG LLP and the KPMG Foundation were proud to again sponsor the BAP Community Service Day project, which this year involved two projects. The first project encompassed donations of backpacks, books and school supplies to the Heart of Florida United Way agency through our Operation Backpack activity.

For our second project, we participated in our first digital Stars of HOPE activity, where we collaborated with the non-profit Stars of HOPE. Stars of HOPE empowers people of all ages to transform individuals (and communities) in need of hope through the power of art and messages of healing. Given the challenges with COVID-19, Stars of HOPE therapeutic arts program is a powerful way to engage people to express their compassion, and connect with anyone in need of hope, anywhere in the world. In addition to donating our stars to various individual recipients, we shared our “stars” with nursing homes in Arizona, Connecticut, Kansas, Maryland, North Carolina and Florida.

We also held our first live Virtual Initiation during our Annual Meeting, an event that will hopefully become a new annual tradition. Since many of our chapters were not able to hold their spring initiation ceremonies on-campus, this Virtual Initiation provided an opportunity for some of our new members to participate in a BAP Initiation Ceremony.

Our Second Century Task Force addressed current opportunities and challenges for BAP during the next 100 years, which involved reviewing and updating our strategic priorities. These priorities included such areas as reviewing and defining BAP’s value proposition; diversifying and growing our membership; and engaging, retaining and growing our Alumni Member Base. For the latter area, we will continue to build upon and improve the recently launched Alumni Network, while providing it a new name (i.e., “Alumni and Member Network”) to be more inclusive of everyone on the network. We are also in the process of refreshing our BAP website and expanding our social media presence.

Finally, in keeping with our theme to “Honor the Past and Embrace the Future,” we announced our new “Giving Back in the Next 100 Initiative.” Many employers today expect their employees to volunteer in their communities, and many new generation leaders are business-minded and service-guided. In keeping with this philosophy, we encourage you, our members and stakeholders, to begin your journey during the upcoming year to “give back in the next 100.”

HONOR THE PAST

Even though the year brought many changes to our organization, we also found many ways to honor our past. For example, we continued our annual Best Practices competition, which is sponsored by Deloitte, even though the final competition was held in a virtual environment. We also continued our Chapter Operations sessions at the Annual Meeting, with submissions in such areas as building and maintaining a strong alumni base, creating successful leadership teams and developing workforce-ready skills. Despite the challenges of operating in a virtual environment, we had over 70 schools participate in our Chapter Operations sessions at the Annual Meeting. During the virtual annual meeting, we announced the winners for the Gold Challenge competition sponsored by KPMG Foundation. The Inclusive Leadership award sponsored by EY will be announced in the fall of 2020.

We also held our annual Project Run with It competition at the Annual Meeting, which is sponsored by Moss Adams LLP. In addition, we continued to hold our Business Information Professional of the Year awards, sponsored by IMA, in the areas of Professional Services, Education and Industry & Government, with virtual presentations provided at the Annual Meeting website. Furthermore, we provided virtual presentations of the Medal of Inspiration (sponsored by the AICPA®), the Outstanding Dean award (sponsored by BAP) and the Outstanding Faculty Advisors (sponsored by RSM).

FINAL THOUGHTS

The last year was certainly different than any of us could have imagined at the start of the year. That being said, it was also a very successful year, thanks to the dedication and involvement of our Executive Office, Board of Directors, Professional Partners, Chapter Advocates, Faculty Advisors and, of course, to our numerous members. We accomplished so much because of your participation, and I hope you will not only continue to be involved during the upcoming year, but also for many years in the future.

Brian L. McGuire
Beta Alpha Psi President
2019–20
UPDATES FOR THE YEAR:

COVID-19 response
- Due to the coronavirus outbreak, canceled 6 Regional Meetings and provided five virtual meetings
- Amended the Program for Chapter Activities (PCA) to assist chapters in maintaining award status
- Professional Partners provided free webinars and webcasts for candidates and members to access and report hours could maintain their reporting hours
- Collaborated with sponsors for the BAP competitions to submit presentations virtually to continue to recognize chapters in Best Practices, Gold Challenge, Project Run With It, and Inclusive Leadership
- Canceled the in-person 2020 Annual Meeting and offered the following for our candidates, members and faculty advisors:
  - A live virtual meeting on Thursday, Aug. 6, 2020 — 3-6pm Eastern time. $10 of the $25 registration fee was donated toward backpacks and school supplies for underrepresented children in Central Florida
  - Offered over 22 pre-recorded professional sessions for candidates and members to access during fall 2020
  - Offered over 130-hours of free CPE for Faculty Advisors to access for 30 days following the live virtual session
  - Virtual initiation for 39 candidates representing 11 chapters

Governance
- Reviewed and documented the Board nominations process
- Second Century Task Force addressed current challenges and keeping BAP relevant for the next 100th years

Internal Business Processes
- Worked with the AICPA and the BAP legal counsel to renegotiate our BAP/AICPA agreement. Signed in September 2020.
- BAP Staff adapted to working from home during the pandemic while maintaining a professional level of customer service to our students and faculty members

Mission and growth
- Continued to build upon and improve the Alumni Network launched August 2019
- The name was changed to Alumni and Member Network in August 2020 to be more inclusive of everyone on the network
- Established a process to refresh the BAP website to be launched in the fall
- Board Approved the establishment of a new graduate student honor — Executive Graduate Honor

Financial transparency
- Continued to move funds from matured CDs to both CDARS and ICS program
- FY21 Budget Reforecast approved by the board

Customer/stakeholders and COVID-19 response
- Reviewed and updated our Strategic Priorities:
  - BAP Value Proposition — Review and Define Overall Value Proposition
  - Financial Oversight — Forecast, Plan, Engage and Retain
  - Our Chapters — Stabilize, Retain and Grow Chapter Value
  - Our Members — Diversify and Grow Membership
  - Our Alumni — Engage, Retain and Grow Alumni Member Base
  - Value Driven Collaboration — Strengthen, Diversity and Grow Professional Partnerships and Sponsors
  - Governance — Attract, Engage and Retain Board Members Future Proof Beta Alpha Psi
- Continued to provide relevant communication to our members via email (BAP Bulletins, BAP Alerts and the BAP Newsletters)
UPDATES FOR THE YEAR:

- Received and approved two new petitions for chapters
- Conducted eight regional meetings: three live/in person and five virtual meetings
- Total Regional Meeting attendance: 1,255
- Conducted faculty round tables and gathered information to inform the Second Century Task Force
- Helped facilitate the pilot of the Executive Graduate Honors membership
- Selected the Outstanding Faculty Advisors for 2020
- Gathered resources for chapters to implement engaging virtual chapter meetings
- Worked with professional organizations to offer certificates to BAP members and faculty advisors

CHAPTER ADVOCATES

PROFESSIONAL PARTNERS

The Professional Partners are key stakeholders of Beta Alpha Psi. The Partners further the mission of the organization through several avenues. The financial support from the Partners subsidizes regional and annual meetings, a variety of student competitions along with many awards for student and academic members. Additionally, the partner representatives provide both their time and expertise to serve as mentors and professional development guides for student members. They also serve as speakers, competition judges and fulfill a variety of other roles related to the success of the organization.

- **Associations/not-for-profits**
  - Accounting & Financial Women’s Alliance (AFWA)
  - AICPA
  - American Accounting Association (AAA)
  - Association of Government Accountants (AGA)
  - CAIA
  - Center for Audit Quality (CAQ)
  - CFA Institute
  - GMAC
  - International Association for Accounting Education and Research (IAAER)
  - ICAEW
  - The Institute of Internal Auditors (IIA)
  - Institute of Management Accountants (IMA)
  - NASBA
- **State societies**
  - California Society of CPAs
  - Illinois CPA Society
  - Indiana CPA Society
  - Maryland Association of CPAs (MACPA)
  - Texas Society of CPAs
  - Washington Society of CPAs

- **Updates for the year**
  - Expand professional partner value proposition through:
    - Implementation of Strategic Account Management Program
    - Opportunities to participate in the Executive Graduate Honor (EGH)
    - Continued from 2019 implementing streamlined Professional Partner recruiting & tracking
  - Increased new partner recruiting to focus on non-traditional accounting firms
  - New partners that joined in 2019–20:
    - Aprio
    - CFA Institute
  - Incoming partners for 2020–21:
    - CAIA
    - AICPA
    - EFWA
    - Floqast
  - Virtual Regional and Annual Meetings
  - Free CPE for faculty advisors
  - High-quality pre-recorded content for chapters and alumni
  - Free COVID-19 resources for students
- **Firms and industry**
  - Aprio
  - BDO USA LLP
  - Deloitte LLP
  - EY
  - Fifth Third Bank
  - Grant Thornton LLP
  - KPMG LLP
  - Moss Adams LLP
  - Protiviti
  - PwC
  - Robert Half
  - RSM US LLP
  - Wipfli LLP
  - Xero

CHAPTER ADVOCATES — CURRENT

- **3rd Year**
  - Sarah Bee
    Western and Northwest Regions
  - Eddie Nabors
    Southeast Region
  - Marci Butterfield
    Rocky Mountain and Missouri Valley Regions
  - Dori Danko
    Midwest Region
  - Julie Harrison, Ph.D.
    Oceania Region
- **2nd Year**
  - Sarah Bee
    Western and Northwest Regions
  - Eddie Nabors
    Southeast Region
  - Marci Butterfield
    Rocky Mountain and Missouri Valley Regions
  - Dori Danko
    Midwest Region
  - Julie Harrison, Ph.D.
    Oceania Region
- **1st Year**
  - Sandra Cereola, Ph.D.
    Atlantic Coast Region
  - Cassy Henderson, Ph.D.
    Southwest region

CHAPTER ADVOCATES — INCOMING

- **3rd Year**
  - Lisa Owens-Jackson, Ph.D.
    Southeast Region
  - Mark Judd
    Western and Northwest Region
  - Cassy Henderson, Ph.D.
    Southwest region
- **2nd Year**
  - Sandra Cereola, Ph.D.
    Atlantic Coast Region
  - Cassy Henderson, Ph.D.
    Southwest region
  - Julie Harrison, Ph.D.
    Oceania Region
- **1st Year**
  - Lisa Owens-Jackson, Ph.D.
    Southeast Region
  - Mark Judd
    Western and Northwest Region
  - Cassy Henderson, Ph.D.
    Southwest region

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Beta Alpha Psi Annual Report | Honor the Past and Embrace the Future
2019–20 GROWTH AND ADAPTATION TO COVID-19

Expansion in 2019-20
• Active Petitioning Chapters for 2019-20:
  − Central Connecticut State University
  − University of New Haven
  − Florida Southern College
  − The Citadel
  − Simmons University
  − Troy University
  − King Abdulaziz University
• Petitions Approved in 2020 — Activities began in August 2020:
  − University of California San Diego
  − Swinburne University
  − University of New Hampshire
• 319 active chapters

Oceania and International Region update
• 5 active chapters in Australia
• 4 active chapters in New Zealand

Adaptation to COVID-19
• Spring 2020
  • Offered over 20 free webcasts and webinars by 15 Professional Partners

• Program for Chapter Activities
  • Adapted the Program for Chapter Activities (PCA) to allow chapters who achieved Distinguished Status to be recognized for Superior status for 2019–20.

• 2020 Virtual Annual Meeting
  • Hosted a 3-hour live virtual meeting Aug. 6, 2020
    — Highlights include:
      − A video message from Laurie Hernandez, USA Gold Medal Olympic Champion
      − Live keynote from Ryan Hirsch, Surgent Professional Education
      − Next 100 years of Giving Back: Community Impact
      − Community Service Day (Sponsored by KPMG and KPMG Foundation) — Stars of HOPE
      − Live Virtual initiation
  • Announced competition award winners:
    − Gold Challenge sponsored by KPMG
    − Best Practices sponsored by Deloitte
    − Project Run With It sponsored by Moss Adams
  • Professional Partner Benefits:
    − Over 22 Pre-Recorded Sessions for all candidates and members to access
    − Over 130 hours of free CPE for 30 days to our Faculty Advisors and Co-Advisors
2020 REGIONAL MEETINGS

DATES AND LOCATIONS
- Southeast: Feb. 21-22, Louisville, KY
- Western: Feb. 21-22, San Diego, CA
- Southwest: Feb. 28-29, New Orleans, LA
- Northwest: Canceled
- Atlantic Coast: March 13, Virtual
- Midwest: March 20, Virtual
- Rocky Mountain: March 27, Virtual
- Missouri Valley: April 3, Virtual
- Oceania, April 16, Virtual

HIGHLIGHTS
- 1,255 attendees total
- 3 in-person meetings
  - San Diego, CA (Western): 177 attendees
  - Louisville, KY (Southeast): 347 attendees
  - New Orleans, LA (Southwest): 241 attendees
- 5 virtual meetings
  - Atlantic Coast: 152 attendees
  - Midwest: 78 attendees
  - Missouri Valley: 100 attendees
  - Rocky Mountain: 63 attendees
  - Oceania: 97 attendees
- 173 total presentations for Best Practices: In-Person — Western 16, Southeast 30, Southwest 26; Virtual submissions — Northwest 25, Atlantic Coast 28, Midwest 18, Missouri Valley 7, Rocky Mountain 5, Oceania 18

2020 ANNUAL MEETING

Virtual
- Thursday, Aug. 6, 2020, 3–6PM ET

HIGHLIGHTS
- 917 attendees total
- 26 presentations for Best Practices
- 72 presentations for Chapter Operations
- 53 participants for Project Run With It (PRWI)
- 39 candidates representing 11 chapters participated in the Virtual Initiation

COMMUNITY IMPACT
- 200 books, backpacks, and Back2School America School Supply Kits donated to a Heart of Florida United Way agency (New Image Youth Center located in the Parramore District in downtown Orlando) through a $10 donation from each Virtual Annual Meeting registration fee. At the distribution, each child was able to choose their own backpack, book and school supply kit.
- 32 chapters and 9 Beta Alpha Psi Board Members participated in our Stars of HOPE activity — Banners with our special messages of Hope will be donated to nursing homes in Arizona, Connecticut, Kansas, Maryland, North Carolina and Orlando, FL.
- A $5,000 donation was made to each of the five programs we were working with for our live Annual Meeting. We plan to work with these organizations for our live event in Orlando in 2022!
- Pack Shack
- Stars of HOPE
- Heart of Florida United Way
- Boys & Girls Clubs of Central Florida
- Junior Achievement of Central Florida
- New Giving Back in the Next 100 initiative announced and a Community Impact tab launched on the Beta Alpha Psi website.
The Business Information Professional of the Year award recognizes three individuals who make significant contributions to business information professions.

This year’s winners have made substantial contributions in education; industry and government; and professional services.

**EDUCATION**

**DR. L. HOWARD GODFREY,**
University of North Carolina at Charlotte

Nominated by — University of North Carolina at Charlotte, Eta Alpha chapter

Dr. L. Howard Godfrey is a professor in the Turner School of Accountancy at the University of North Carolina in Charlotte, having served on the faculty since 1975. He teaches mainly in the area of federal income tax.

He has a Ph.D. with a major in accounting from the University of Alabama, a Master of Accountancy from the University of Mississippi and a Bachelor of Science with a Major in Accounting from Mississippi College. He served as chair of the Accounting Department for six years and was a faculty advisor for the Eta Alpha Chapter of Beta Alpha Psi at UNC Charlotte.

Dr. Godfrey was given the North Carolina Accounting Educator of the Year Award by the N.C. Association of CPAs in 1994. He has also received the Thomas C. Turner Excellence in Teaching Award and the Bank of America Award for Teaching Excellence.

He is a member of the editorial board of *The Tax Adviser,* a monthly tax journal published by the American Institute of CPAs (AICPA). He is past president of Carolinas Chapter of Financial Executives International and has served as a member of the International Taxation Committee of the AICPA.

Dr. Godfrey is the author of *Handbook on Tax-Exempt Organizations.* He has published 20 articles in professional journals, with a primary focus on federal taxation. He has taught annual federal tax update courses for CPAs, attorneys and business executives for the last 40 years.

“Thank you for this award. This is such an honor for me, especially since it is based on a nomination from our students at UNC Charlotte. A highlight of my career was being faculty advisor when the Honorary Accounting Society at UNC Charlotte received its charter from the National Office and became the Eta Alpha Chapter of Beta Alpha Psi.”

— Dr. L. Howard Godfrey

**BUSINESS INFORMATION PROFESSIONAL OF THE YEAR**

**INDUSTRY AND GOVERNMENT**

**Hafiz Chandiwala — Executive Vice President, CAO, CFO, Coca-Cola Bottling Company**

Nominated by — University of Alabama at Birmingham, Delta Chi Chapter

Hafiz Chandiwala serves as Executive Vice President, Chief Administrative Officer and Chief Financial Officer for Coca-Cola Bottling Company United, which ranks as the third-largest bottler of Coca-Cola products in the United States.

Hafiz holds leadership positions on several Coca-Cola System boards and committees, including the board of directors of Coca-Cola Bottler Sales & Services and Chairman of Western Container Corporation.

In addition, he is involved with numerous business and civic organizations, such as Mayer Electric Supply’s Advisory Board and the National Multiple Sclerosis Society Board.

Hafiz also serves on several boards at the University of Alabama at Birmingham (UAB), including the Collat School of Business Advisory Board, the UAB Athletics Foundation and is the President of the UAB National Alumni Society Board.

Hafiz holds a Bachelor of Science in Accounting from the University of Alabama at Birmingham and is a CPA in Alabama. Hafiz joined the Delta Chi chapter of Beta Alpha Psi while attending UAB and has continued to stay connected with the chapter throughout his career.

“It was an honor to be nominated for the 2020 Business Information Professional of the Year Award, much less receive the award. I want to thank the Delta Chi Chapter of Beta Alpha Psi at the University of Alabama at Birmingham for the nomination and for preparing me for my career through academic excellence, professional growth, leadership development and service to others. It has been my honor to be a Beta Alpha Psi member for almost 30 years. I look forward to seeing Beta Alpha Psi continue to develop future industry leaders.”

— Hafiz Chandiwala
PROFESSIONAL SERVICES

Ann M. Puckett — Partner and Tax Director, BKD LLP

Nominated by — Western Kentucky University, Eta Omicron Chapter

Ann coordinates the estate planning services and outsourcing services practice in BKD’s Bowling Green office and is tax director for the Bowling Green and Nashville offices. She has more than 30 years of experience, providing planning and compliance services to individual and business clients in the areas of transaction structuring, estate and business succession planning and IRS representation.

She is a member of the American Institute of CPAs and Kentucky Society of Certified Public Accountants and is a member and past president of the Southern Kentucky Estate Planning Council.

Ann serves on the board of directors of the Bowling Green Area Economic Development Authority, the Bowling Green Area Chamber of Commerce Foundation and the University of Kentucky School of Accountancy Advisory Council.

Ann is a 1988 graduate of the University of Kentucky, Lexington, with a B.S. degree in accounting.

“I was pleasantly surprised when the WKU Beta Alpha Psi chapter reached out to me last year to say they wanted to nominate me for this award. However, I was absolutely shocked when I found out I had been selected to receive this award! It has been my pleasure to become intimately involved with the WKU chapter and its members as well as many other community organizations throughout my career. I get much more from that involvement than I give. It is so nice and humbling to be recognized for doing things that I love!”

— Ann M. Puckett

MEDAL OF INSPIRATION

The Medal of Inspiration Award is bestowed upon a student who has experienced extreme hardships in his or her life and has demonstrated an unusually high level of success despite that adversity.

Winner: Joyce Chung, University of North Carolina at Charlotte, Eta Alpha chapter

Joyce Chung has experienced more losses and challenges than many do in an entire lifetime and yet she has succeeded. She has endured the passing of her mother, father and step-mother, all three to devastating illnesses and all in 13 years. She has been the primary caregiver to her three younger brothers since she was 10 years old.

Joyce endured and survived an abusive relationship with her older brother and has become estranged from him. Joyce kept her three younger brothers with her as she fought through a period of homelessness and insecurity after her father’s death.

Despite these challenges, Joyce is an active member of Beta Alpha Psi, serving as the mentorship chair and was recently elected as the VP of Operations. She is completing one internship, accepted an offer for another internship with a Fortune 500 bank and intends to earn her CPA certification after graduation in May 2021.

“Life is not easy and I don’t think it is supposed to be. I believe the struggles we face individually and together are what shape and mold us into who we are, how we think and perceive the environment around us. These obstacles in our lives are not fun in the moment. But when I look back, I know I would not be the person I am today if I had not endured and overcome these hard moments in my life. So, I encourage others to embrace the challenges of life and keep moving forward.”

— Joyce Chung
Brian McGuire said: “As President of Beta Alpha Psi, you are able to recognize someone in particular who put in countless hours and passion into Beta Alpha Psi. Passion is only the beginning to describe this year’s recipient. My choice for the 2020 President’s Award is Paul Wiese, Professional Partners Chair who represents Surgent Professional Education.”

Here are just a few of the strategic outcomes that Paul contributed:

• In 2019, he helped to establish and chair the Second Century Task Force. Paul had many ideas and put together a dream team to help make these ideas become reality. His initial leadership helped to move along initiatives, such as rethinking and revising the Purpose statement, helping to formalize the new Executive Graduate Honor and introducing the Professional Development Portfolio, where professional partners will be able to offer discounted programs for BAP members and alumni exclusively on the Alumni Network.

• Paul, along with Deloitte and BAP alumni, reviewed and revised the feedback process for Best Practices to be more efficient for the judges and provide the constructive feedback that chapters desired.

• Paul always made time to offer advice on the BAP website as well as the professional partners infographic and provide current and relevant ideas for BAP’s communications.

“I was truly honored to be awarded the 2020 Beta Alpha Psi President’s Award. This award is given annually to someone who has shown dedication to the organization consistently over a period of years, so to be presented it this year was truly humbling. I have been part of Beta Alpha Psi on some level since 1999 and that involvement has played a tremendous part in my professional and personal growth, so to receive an award for service to an organization that has been so good to me is more than I could have imagined. Thank you, Beta Alpha Psi!”

— Paul Wiese

Dr. Marc Rubin — Miami University

Nominated by — Miami University, Omega Chapter

Dr. Marc Rubin recently retired as the Dean and Mitchell P. Rales Chair of Business Leadership in the Farmer School of Business at Miami University in Oxford, OH. Before that, he served as the Chair in the Department of Accountancy. He earned a B.S. in accounting from Miami University, a M.A.S. from the University of Illinois and a Ph.D. from the University of Texas and is a CPA and has experience with a national accounting firm.

Professor Rubin’s primary teaching interest is financial accounting. He has won teaching awards at both Miami University and the University of North Carolina. His research interests are in the area of governmental accounting and auditing and he has published in a number of leading journals, including The Accounting Review, Journal of Accounting and Public Policy, and Research in Government & Nonprofit Accounting. He also has authored research reports for the Financial Accounting Foundation and Governmental Accounting Standards Board. Professor Rubin has served on a number of other editorial boards and as a reviewer for many journals and conferences.

Professor Rubin has engaged in many service activities while on the faculty at Miami, including serving as Beta Alpha Psi faculty advisor. He is active in the American Accounting Association and recently served as President of the organization. He has also served on various committees of the American Institute of CPAs. In addition, he served as a member of Accounting Accreditation Committee of the AACSB.

“Thank you for this unexpected and wonderful award. Beta Alpha Psi had a very significant impact on my career path and directly influenced my decision to be an accounting professor. My advice to the members of Beta Alpha Psi is to take advantage of the opportunities presented to you and engage with faculty members, professionals and peers. These relationships can last you throughout your career.”

— Dr. Marc Rubin

The Outstanding Dean award recognizes deans for their significant contribution in faculty support and/or financial support to helping achieve the goals and objectives of their university’s Beta Alpha Psi chapter. Without the deans’ support, many Beta Alpha Psi chapters would be underfunded and not able to deliver the types of programs and activities needed to provide an adequate Beta Alpha Psi experience.

Dr. Marc Rubin — Miami University

Nominated by — Miami University, Omega Chapter

Dr. Marc Rubin recently retired as the Dean and Mitchell P. Rales Chair of Business Leadership in the Farmer School of Business at Miami University in Oxford, OH. Before that, he served as the Chair in the Department of Accountancy. He earned a B.S. in accounting from Miami University, a M.A.S. from the University of Illinois and a Ph.D. from the University of Texas and is a CPA and has experience with a national accounting firm.

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OUTSTANDING FACULTY ADVISOR AWARD

Sponsored by RSM US LLP since 2007
One of the most vital elements in the success of a Beta Alpha Psi chapter is the faculty advisor. Through countless hours of commitment, individual faculty advisors make substantial contributions to the professional growth and development of business financial information students.
Beta Alpha Psi and RSM US LLP are privileged to recognize four outstanding faculty advisors who go above and beyond the requirements of a faculty advisor. Honorees receive a plaque and a cash award of $5,000 in recognition of their service to Beta Alpha Psi.

Steven Mezzio
Pace University, Iota Lambda chapter

Steven Mezzio, Ph.D., CPA, CISA, CISSP, FSA is a former Partner with PwC, and is a Professor of Accounting and Executive Director of the Pace University Lubin School of Business Center for Excellence in Financial Reporting. He is also actively involved in range of professional services activities, including serving as a member of the BAP Board of Directors; serving on the editorial advisor boards of both the AICPA Journal of Accountancy, and the NYSSCPA CPA Journal; a national instructor for the AICPA COSO Certificate Program; a member of the UN Global Compact’s Sustainability Mindset in Higher Education Working Group; and he is a former member of the Center for Audit Quality (CAQ) SEC Regulations Committee.

“IT is an honor to be the recipient of the Beta Alpha Psi Outstanding Faculty Advisor for 2020. Beta Alpha Psi (BAP) is a special institution that plays an important role in student learning, workplace readiness and in facilitating a culture of community service. It is a privilege for me to serve as a BAP faculty advisor contributing to this mission and purpose. As a chapter faculty advisor, I am fortunate to have a university administration and previous successful advisors that passed on to me a legacy of success and valuable support of our BAP Chapter. In the end, it is the dedication, talent and commitment of our students that drive the success of our BAP Chapter each year. Thank you to our sponsor, RSM, the BAP executive office, my BAP chapter students and my university for their essential support and for the opportunity to be nominated and selected for this rewarding recognition.”
– Steven Mezzio

Tammy Perri
University of Nevada Las Vegas, Theta Omicron chapter

Tammy joined the University of Nevada, Las Vegas, and became faculty advisor of Beta Alpha Psi in the Fall of 2014. She currently a senior lecturer teaching financial accounting and auditing in the gaming industry. Before teaching, she worked as an internal audit manager in the gaming industry and gaming enforcement. In her free time, she enjoys playing poker on the strip with the tourists.

“It is an honor to be nominated by my students for doing something that I absolutely love being a part of!”
– Tammy Perri

Janine Coupe
The University of Sydney, Lambda Omega chapter

Janine is a Lecturer in the Discipline of Accounting, she teaches financial and management accounting at both postgraduate and undergraduate level. Before joining academia Janine worked as an auditor in a Big Four accounting firm. She has worked for a number of leading Australian and Global organizations including those in the telecommunications, television, oil & gas and banking industries. Her experience has been gained in New Zealand, the United Kingdom and Australia.

Janine is an award-winning educator. She is the recipient of the prestigious Wayne Lonergan Outstanding Teaching Award and numerous Dean’s Citations for Teaching in recognition of her outstanding dedication to supporting and enhancing the student learning experience.

Jason Stanfield
Ball State University, Zeta Omega chapter

Jason “Dr. Stan” Stanfield, assistant professor of accounting at Ball State University, received his Ph.D. from the Krannert School of Management at Purdue University in 2011, and also holds an MBA from Ball State University and an undergraduate degree from Purdue. Before joining the faculty at Ball State, Jason was an instructor at Purdue. Prior to his doctoral studies, Jason had a career in sales management and was also an entrepreneur. Jason has been involved with Beta Alpha Psi as a faculty advisor at both Purdue and Ball State since 2011, and has won many undergraduate teaching awards. As a scholar, his research has been published in The Accounting Review, Journal of Accounting Education, Journal of Accountancy and CPA Journal. Jason is regularly involved in the academic accounting community, and serves as Council Representative for the Midwest Region of the American Accounting Association after a term as President of the same region.

“One of the best parts of my career has been working with student organizations, and any time I spend with Beta Alpha Psi students is always a high point in my day. I am humbled and delighted to receive this award.”
– Jason Stanfield

“Thank you to BAP and RSM for this award, it’s a great honor. As Faculty Advisor, I get to work with an outstanding group of students and faculty, both in my own university and in the wider Oceania region. Seeing the passion, enthusiasm and creativity of my students makes it all worthwhile, plus we have a lot of fun!”
– Janine Coupe
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VITA AWARDS
• Sponsored by IRS
• The Volunteer Income Tax Assistance (VITA) Program offers free tax help to people who make $50,000 or less and need assistance in preparing their own tax returns.
• This is an excellent opportunity for Beta Alpha Psi chapters to gain exposure on campus and in the community, while also gaining valuable practical experience in income tax preparation.

2020 VITA PARTICIPANTS
• Boise State University, Zeta Psi chapter
• California State University Fresno, Gamma Omicron chapter
• California State University Long Beach, Gamma Omega chapter
• Colorado State University, Gamma Tau chapter
• Creighton University, Alpha Nu chapter
• Grand Valley State University, Kappa Beta chapter
• Middle Tennessee State University, Zeta Gamma chapter
• Murray State University, Epsilon Nu chapter
• Oregon State University, Epsilon chapter
• Portland State University, Epsilon Alpha chapter
• Rowan University, Xi Theta chapter
• San Francisco State University, Beta Chi chapter
• The University of Akron, Gamma Eta chapter
• University at Buffalo, Zeta Theta chapter
• University of Massachusetts Amherst, Delta Nu chapter
• University of Arkansas at Little Rock, Epsilon Pi chapter
• University of North Georgia, Nu Gamma chapter
• University of Oregon, Beta chapter
• University of Tennessee at Chattanooga, Eta Kappa chapter
• Utah Valley University, Mu Pi chapter
• Valdosta State University, Mu Zeta chapter
• Washington University in St. Louis, Nu Iota chapter
• Western Washington University, Theta Phi chapter

BEST PRACTICES
• Sponsored by Deloitte since 2001
• The Best Practices competitions give members a chance to present their expertise on one of the topics for the year.
• The Best Practices topics for 2019 included: Innovation, Impact, Engagement.
• Deloitte LLP Professional Partner Representative Jeremy Carrine presented the awards at the Virtual Annual Meeting.

REGIONAL WINNERS
(based on category)

INNOVATION
Western
Southeast
Southwest
Atlantic Coast
Midwest
Missouri Valley
Rocky Mountain
Northwest
Oceania
California State University Fullerton
Western Kentucky University
University of Arkansas
Pace University
Ball State University
University of Iowa
Utah State University
Portland State University
The University of Sydney

ENGAGEMENT
Western
Southeast
Southwest
Atlantic Coast
Midwest
Missouri Valley
Rocky Mountain
Northwest
Oceania
University of Nevada Las Vegas
University of North Carolina at Charlotte
University of Arkansas
Rowan University
Cleveland State University
Creighton University
Utah State University
Seattle University
University of Technology Sydney

IMPACT
Western
Southeast
Southwest
Atlantic Coast
Midwest
Missouri Valley
Rocky Mountain
Northwest
Oceania
University of Nevada Las Vegas
Georgia State University
Texas State University
University at Buffalo
University of Wisconsin Whitewater
University of Iowa
University of Utah
Washington State University
Monash University

ANNUAL MEETING WINNERS

INNOVATION
First place .............The University of Sydney, Lambda Omega chapter
Second place ...............University of Arkansas, Alpha Iota chapter
Third place .............California State University at Fullerton, Delta Beta chapter

IMPACT
First place ...............University of Wisconsin Whitewater, Epsilon Rho chapter
Second place ............Monash University, Xi Epsilon chapter
Third place ..............Washington State University, Delta Epsilon chapter

ENGAGEMENT
First place ...............University of Nevada Las Vegas, Theta Omicron chapter
Second place ..............University of Technology Sydney, Upsilon Tau Sigma chapter
Third place ..............Seattle University, Delta Eta chapter
EY INCLUSIVE LEADERSHIP AWARDS

- An inclusive work environment that values and leverages the unique differences of a diverse team is critical for the future success of the global business community. The leadership at EY fully understands the importance of an inclusive environment that values the contributions of everyone. The firm believes that a key element of effective teaming is the diversity from team members of different backgrounds and perspectives. Highly effective leaders are those who are experienced in leading diverse teams.
- EY also believes that it is important for future leaders of the business community to have a great appreciation and understanding of how to be a successful team in a diverse and inclusive environment. EY also believes that when differences are celebrated, talented people from all backgrounds have the chance to develop, advance and make more meaningful contributions to our clients and our culture.
- Through the EY Inclusive Leadership award, we asked Beta Alpha Psi members — are you ready to help us build a better working world by leveraging the power of diverse perspectives?

This year, EY recognizes 11 chapters who are making a positive impact on diversity and inclusiveness within Beta Alpha Psi, their respective school and/or their community. EY awarded $500 to fund the program outlined in their initial proposal and they are eligible to continue to be considered for one of five grand prize awards. Best of luck to these 11 chapters – we’re excited to see your final proposals!

FIRST ROUND WINNERS

| Case Western Reserve University | Pi chapter |
| The University of Melbourne and Monash University | Xi Lambda chapter and Xi Epsilon chapter |
| Truman State University | Kappa Nu chapter |
| Western Kentucky University | Eta Omicron chapter |
| Grand Valley State University | Kappa Beta chapter |
| The University of Sydney | Lambda Omega Chapter |
| University of Connecticut | Epsilon Lambda chapter |
| The University of Tampa | Lambda Beta chapter |
| Kent State University | Beta Psi Chapter |
| University of Massachusetts Amherst | Delta Nu chapter |

GOLD CHALLENGE

- Beta Alpha Psi recognizes that many chapters often go above and beyond what is required to become a Superior Chapter. In an effort to reward these chapters, the Gold Challenge competition provides an annual award of $2,500 to up to 10 chapters.
- The Gold chapter status is the highest award level a chapter can receive. Only a limited number of chapters can be awarded the Gold chapter status within one academic year. The award is given to chapters that continually demonstrate and exemplify the highest values of Beta Alpha Psi: leadership, scholastic success, lifelong learning and development, service, and ethical behavior.
- Eligible chapters are required to submit a seven-minute video presentation that explains and/or demonstrates why their chapter deserves the KPMG Gold Challenge award.

WINNERS

| The University of Sydney | Lambda Omega Chapter |
| Monash University | Xi Epsilon chapter |
| University of Nevada Las Vegas | Theta Omicron chapter |
| University of Arkansas | Alpha Omicron chapter |
| University of Utah | Epsilon Xi chapter |
| Bradley University | Zeta Lambda chapter |
| University of Technology Sydney | Upsilon Tau Sigma chapter |
| University of South Florida | Delta Gamma chapter |
| Florida International University | Eta Iota chapter |
| Western Kentucky University | Eta Omicron chapter |
GRANT THORNTON ETHICS AWARDS

- Sponsored by Grant Thornton LLP since 2010
- The purpose of this award is to help encourage ethical behavior throughout the accounting, finance and information technology professions. The business world has experienced the ethical failures of many individuals and organizations in the profession, and these actions have had detrimental and lasting effects on the economy and individual investors and have damaged the reputation of these professions. It is a core value of Beta Alpha Psi to encourage ethical behavior.
- One way to encourage this behavior is to examine difficult situations demanding ethical responses and by recognizing the resulting exemplary ethical behavior by individuals and/or organizations in the professions, government, business, academia and not-for-profits.
- Grant Thornton recognized 11 chapters who reached semifinalist status in this year’s competition. Grant Thornton awarded $1,000 per selection to fund the project outlined in their initial proposals. Due to COVID-19, the competition was suspended for 2019–2020.

SEMIFINALISTS

<table>
<thead>
<tr>
<th>University</th>
<th>Chapter</th>
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<tbody>
<tr>
<td>University of Massachusetts Amherst</td>
<td>Delta Nu chapter</td>
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<tr>
<td>North Carolina A&amp;T State University</td>
<td>Zeta Sigma chapter</td>
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<tr>
<td>Seattle University</td>
<td>Delta Eta chapter</td>
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<tr>
<td>Case Western Reserve University</td>
<td>Pi chapter</td>
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<tr>
<td>University of Nevada Las Vegas</td>
<td>Theta Omicron chapter</td>
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<tr>
<td>University of Technology Sydney and The University of Sydney</td>
<td>Upsilon Tau Sigma and Lambda Omega chapters</td>
</tr>
<tr>
<td>Monash University</td>
<td>Xi Epsilon chapter</td>
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<tr>
<td>Pace University</td>
<td>Iota Lambda chapter</td>
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<tr>
<td>Kent State University</td>
<td>Beta Psi chapter</td>
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<tr>
<td>The University of Tampa</td>
<td>Lambda Beta chapter</td>
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PROJECT RUN WITH IT

- Sponsored by Moss Adams LLP since 2008
- Project Run With It involved 53 Beta Alpha Psi chapter members working together in virtual sessions before the Annual Meeting to develop solutions to real-life business problems of actual not-for-profit (NFP) organizations.
- The students worked in 14 teams of three or four and had about two weeks to develop a formal presentation showcasing their solution to the business issues the NFP presented in their “request for proposal” for consulting services.
- Cultured Kids Inc., the NFP for 2020 provided background information and a virtual Q&A session to answer the participating students’ questions.
- Presented by Elizabeth Dollar from Moss Adams LLP during the Virtual Annual Meeting

WINNERS:

TEAM A–5
- David Shamburger, University of Texas at Tyler
- Madison Rhoton, University of Tennessee Knoxville
- Amy Lin, Middle Tennessee State University
- Erin Kueter, University of South Dakota

TEAM B–3
- Laura Minton, University of Texas at Tyler
- Rebecca Heidt, University of Tennessee Knoxville
- Caroline Blank, Middle Tennessee State University

TEAM C–4
- Jaskaran Singh, Monash University
- David Fornito, University of Melbourne
- Richard FitzGerald, University of Sydney

“Firstly, I want to say thank you for offering Cultured Kids the opportunity to participate in PRWI this year. It was such a great experience for us to learn and gain some new insights in areas where we might not have considered. I thoroughly enjoyed all the presentations and they were met with such enthusiasm. I’m looking forward to taking many of the recommendations and putting them into action.”

– Christine Blinn, Cultured Kids Inc. board member and judge for PRWI 2020

“This project was a blast!”

– Kyle Shamburger, student participant (team A-5)

“I would like to express how much I enjoyed working on the project. I had an amazing time working with a really great team who’ve shown massive effort.”

– Jaskaran Singh, student participant (team C-4)
To qualify as superior, each chapter must report a designated amount of Reaching-Out-Activities (ROA) and each chapter member/candidate must have a certain number of professional and service hours, as outlined in the Program for Chapter Activities. Each Superior chapter receives a monetary award of $500 from KPMG LLP and the KPMG Foundation.

**SUPERIOR WINNERS**

- Appalachian State University
- Arizona State University
- Auburn University
- Auburn University at Montgomery
- Ball State University
- Baruch College
- Bentley University
- Boise State University
- Bowling Green State University
- Brigham Young University
- California State Polytechnic University Pomona
- California State University East Bay
- California State University Fresno
- California State University Fullerton
- California State University Long Beach
- California State University Los Angeles
- California State University Northridge
- Case Western Reserve University
- Central Michigan University
- Clemson University
- Cleveland State University
- College of Charleston
- Colorado State University
- Creighton University
- Deakin University
- Drake University
- Eastern Illinois University
- Eastern Michigan University
- Elon University
- Emporia State University
- Florida Atlantic University
- Florida Gulf Coast University
- Florida Southern College
- Florida State University
- Fordham University
- George Mason University
- Georgia Southern University
- Georgia State University
- Gonzaga University
- Grand Valley State University
- Hofstra University
- Idaho State University
- Iowa State University
- Jacksonville State University
- Kennesaw State University
- Kent State University
- King Abdulaziz University
- Lamar University
- Long Island University Post
- Louisiana State University
- Louisiana Tech University
- Loyola University Maryland
- Manhattan College
- Marquette University
- Marshall University
- Middle Tennessee State University
- Minnesota State University Mankato
- Mississippi State University
- Missouri State University
- Morgan State University
- Murray State University
- New Mexico State University
- New York University
- Nichols State University
- North Carolina A&T State University
- Northern Arizona University
- Northern Illinois University
- Oakland University
- Ohio University
- Oklahoma State University
- Old Dominion University
- Oregon State University
- Pace University
- Portland State University
- Quinnipiac University
- Robert Morris University
- Rowan University
- Rutgers University New Brunswick
- Salisbury University
- Sam Houston State University
- Samford University
- San Francisco State University
- San Jose State University
- Seattle University
- Southeast Missouri State University
- Southeastern Louisiana University
- Southern Illinois University at Carbondale
- St. John’s University Staten Island
- Stephen F. Austin State University
- Stonehill College
- Suffolk University
- SUNY Oswego
- Syracuse University
- Temple University
- Tennessee Tech University
- Texas State University
- The University of Akron
- The University of Alabama
- The University of Melbourne
- The University of Memphis
- The University of New Mexico
- The University of Southern Mississippi
- The University of Tampa
- Truman State University
- University at Buffalo
- University of Alabama at Birmingham
- University of Arizona
- University of Arkansas at Little Rock
- University of Arkansas Fort Smith
- University of Central Arkansas
- University of Central Florida
- University of Connecticut
- University of Florida
- University of Hartford
- University of Hawaii Manoa
- University of Houston Clear Lake
- University of Idaho
- University of Iowa
- University of Kentucky
- University of Louisiana at Lafayette
- University of Louisiana at Monroe
- University of Massachusetts Amherst
- University of Massachusetts Dartmouth
- University of Michigan Dearborn
- University of Mississippi
- University of Missouri Kansas City
- University of Missouri St. Louis
- University of Montana
- University of Nebraska at Omaha
- University of Nevada Reno
- University of New Orleans
- University of North Alabama
- University of North Carolina at Charlotte
- University of North Carolina at Greensboro
- University of North Florida
- University of North Georgia
- University of North Texas
- University of Northern Colorado
- University of Notre Dame
- University of Oregon
- University of Pittsburgh
- University of San Diego
- University of South Carolina Upstate
- University of South Dakota
- University of South Florida St. Petersburg
- University of Southern California
- University of Southern Indiana
- University of Tennessee at Chattanooga
- University of Tennessee at Knoxville
- University of Texas at Arlington
- University of Texas at El Paso
- University of Texas at San Antonio
- University of Texas at Tyler
- University of Toledo
- University of Washington
- University of Washington Bothell
- University of West Florida
- University of Wisconsin La Crosse
- University of Wisconsin Oshkosh
- University of Wisconsin Whitewater
- Utah State University
- Valdosta State University
- Virginia Commonwealth University
- Washington State University
- Washington State University Vancouver
- Washington University in St. Louis
- Weber State University
- West Chester University
- Western Illinois University
- Western Michigan University
- Western Washington University
- Wichita State University
- Wright State University
- Youngstown State University