

New Faculty Advisor & Refresher Workshop



Kelly Noe

Chapter Advocate – Southwest Region

Eddie Nabors

Chapter Advocate – Southeast Region

BAΨ Annual Meeting
Thursday August 9, 2018

New Faculty Advisor Workshop



ROA

CA

PCA

Policies



BOY

ES

EO

EOY



FA

Understanding Your Role as FA



- Provide counsel and assistance to chapter.
- Mentor/develop student leaders.
- Serve as liaison:
 - between chapter and the BAP Executive Office.
 - between chapter and administrative units of your university.
- ***Make a commitment. Promote chapter.***

Understanding Your Role as FA: Make a Commitment by...



- being available to your chapter.
- attending and supporting chapter activities.
- traveling to regional and annual meetings.
- voting at chapter meetings.
- becoming familiar with the
 - Program of Chapter Activities (PCA).
 - Policies and Procedures Manual.
 - Constitution and Bylaws.
- providing **continuous** encouragement.

Understanding Your Role as FA: Promote Your Chapter...



- in accounting principles courses
- in the first majors course for students in accounting, finance and information systems
- on your university/college website
- academic advisors during orientation or advising and on Canvas, Blackboard, etc.
- Social media such as the university or business school Facebook page
- on the walls of your classroom buildings

Understanding Your Role as FA



- Provide counsel and assistance to chapter.
- Serve as liaison:
 - between chapter and the Executive Office.
 - between chapter and administrative units of your university.
- Make a commitment.
- Promote your chapter.
- ***Contact all potential candidates as soon as they become eligible.***

Understanding Your Role as FA: Contact potential candidates through...



- letters, emails, phone calls.
- student advisors at orientation/advising sessions or in Learning Management System (Canvas, D2L, Blackboard, etc.)
- announcements by enthusiastic members in classrooms.
- faculty encouragement inside and outside of the classroom.
- signs in halls and in classrooms.
- recruitment tables in throughways.
- professional/recruiter encouragement of nonmembers at career fairs and interviews.
- relationships.

Tips for a Successful Chapter



- Have an actively involved FA and Officers!
- Remind yourself that it's not about you, but about the students.
- Maintain ethics and integrity in all you do.
- Maintain consistency.
- Seek support from faculty, dean, professionals and alumni.

Continued...

Tips for a Successful Chapter



- Recruit and train great leaders.
- Provide meaningful programs at meetings.
- ***Strive to keep officers motivated.
Communicate constantly and recognize their
contributions and accomplishments.***

Tips for a Successful Chapter: Motivating Officers



- Expect a lot – your officers will generally want to please you!
 - Focus on developing leadership skills.
 - Hold officers accountable.
- Use committees to ease officer burn-out.
- Gather officers for planning meeting shortly after elections.
- Meet with officers regularly throughout the year.
- **Be part of the group!**

Tips for a Successful Chapter



- Recruit great leaders.
- Strive to keep officers motivated.
- ***Strive to keep all members active.***
- ***Strive to do more than just the minimum, but...***
 - ***stress quality over quantity and***
 - ***measure success in terms of what is best for YOUR chapter and its members.***
- ***Have fun!***

Where to Find Answers



- www.bap.org

www.bap.org



Your source for almost all FA-related information.

SEARCH

[Alumni](#) [Chapters](#) [Advocates](#) [Board](#) [Partners](#)


[About](#) [Join](#) [Competitions](#) [Member Benefits](#) [News](#) [Events](#) [Donate](#) [Contact](#)

For Our Chapters and Faculty Advisors

www.bap.org/chapters

Beta Alpha Psi Chapter Resour X

Secure | https://www.bap.org/chapters



BETA ALPHA PSI
The International Honor Organization for
Financial Information Students and Professionals

SEARCH

Alumni Chapters Advocates Board Partners

About Join Competitions Member Benefits News Events Donate Contact

For Our Chapters and Faculty Advisors

As candidates, members and faculty advisors of Beta Alpha Psi you all serve an integral part in making sure the organization functions effectively. On this page you will find all the resources needed to be successful.

Resources

- [BAP PowerPoint Template](#)
- [Member Recruitment Video](#)
- [New Essential Skill - Accepting Feedback](#)
- [Essential Skills \(PDF\)](#)
- [How do I keep my chapter active? \(PDF\)](#)
- [Letter to Beta Alpha Psi Deans \(PDF\)](#)

Reporting Intranet Resources

- [Reporting Intranet Guide \(PDF\)](#)
- [Reporting Intranet FAQs \(PDF\)](#)
- [5 Quick Reporting Intranet Tips](#)
- [Folder Cleanup Alert \(PDF\)](#)
- [Membership Certificates Alert](#)
- [PCA At-A-Glance \(PDF\)](#)
- [August 2017 PCA Presentation \(PDF\)](#)
- [BAP Alert – October 15 Deadline Reminders](#)
- [Mid Year Reporting Guide \(PDF\) and Webinar Recording](#)
- [End of Year Reporting Guide \(PDF\)](#)
- [IRS Form 990-N \(e-Postcard\) User Guide](#)
 - [What we will need from your chapter for the 990n tax filing \(Please send to \[bap@bap.org\]\(mailto:bap@bap.org\)\):](#)
 - [990-N Submission \(PDF\)](#)
 - [990-N Confirmation \(PDF\)](#)
- [IRS Form 990-N \(e-Postcard\) Filing](#)
- [Tutorials](#)

Chapter Forms

- [2017 Maintenance Fee Invoice \(PDF\)](#)
- [Credit Card Authorization Form \(PDF\) -For School Administrators who do not have access to the Reporting Intranet](#)

Chapter Supplies

PROFESSIONAL PARTNER STUDENT BENEFITS

As a member of Beta Alpha Psi you are entitled to certain benefits. Click [here](#) to see all our Professional Partners have to offer!

CHAPTER RESOURCES

- [Initiations and Elections](#)
- [Active Chapters](#)
- [Chapter Fees](#)
- [Reporting Intranet](#)
- [Insurance Rider](#)

CHAPTER HANDBOOK

- [Program for Chapter Activities](#)
- [Financial Reporting Guide](#)
- [Constitution & Bylaws](#)
- [Policy and Procedures Manual](#)
- [Code of Ethics](#)

For Our Chapters and Faculty Advisors

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Reporting Intranet Resources

- [Reporting Intranet Guide](#) (PDF)
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- [Tutorials](#)

Chapter Forms

- [2017 Maintenance Fee Invoice](#) (PDF)
- [Credit Card Authorization Form](#) (PDF) -**For School Administrators who do not have access to the Reporting Intranet**

Chapter Supplies

- [BAP Brochure](#) (PDF)
- [Name Badge Template](#) (Compatible with Avery 5392)
- [Replacement Certificates Form](#) (PDF)
- [Award Certificates Form](#) (PDF)
- [Order Jewelry, Table Covers, and BAP Branded Items Here](#)
- For brochures contact the Executive Office
- [Honor Cords order form](#) [Honor Stoles order form](#)

www.bap.org/chapters

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Faculty Advisor Resources

- [Faculty Advisor Manual \(PDF\)](#)
- [New Faculty Advisor Information \(2017 Annual Meeting session\)](#)
- [Regional Meeting Host Chapter Manual](#)

CHAPTER RESOURCES

[Initiations and Elections](#)

[Active Chapters](#)



[Chapter Fees](#)



[Reporting Intranet](#)

[Insurance Rider](#)

www.bap.org/chapters

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CHAPTER RESOURCES

[Initiations and Elections](#)

[Active Chapters](#)







[Chapter Fees](#)

[Reporting Intranet](#)

[Insurance Rider](#)

CHAPTER FEES:

- 
- 
- 
- Annual Chapter Maintenance Fee: \$300 (this fee does not apply to petitioning chapters)
 - One-Time International Candidacy Fee: \$65 (this fee does apply to petitioning chapters)
 - Late Payment Fee per candidate after 60 days: \$20
 - Replacement Certificate Fee: \$15
 - Certificate Fee for Honorary Initiate that is already a member of another chapter: \$15
 - End-of-Year Late Reporting Fee (for failure to submit by June 1: tax filing 990-N e-Postcard and/or Faculty Advisor Sign-off): \$100
 - All membership fees are nonrefundable
 - Credit card payment is accepted for dues and the chapter maintenance fee
 - Please allow up to two weeks for delivery of certificates. If you need them sooner, contact bap@bap.org.
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www.bap.org/chapters

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CHAPTER RESOURCES

[Initiations and Elections](#)

[Active Chapters](#)

[Chapter Fees](#)



[Reporting Intranet](#)

[Insurance Rider](#)

REPORTING INTRANET:

- Candidate and member information is reported here as well as the chapter's professional, service, essential skills and reaching out activities. Chapter EIN can be found here too.
 - Reporting Deadlines to Remember
 - » Beginning of the Year Report (BOY) – October 15th
 - » Mid-Year Report (Award Seeking Chapters only) – December 15th
 - » End of Year Report (EOY) – June 1-
 - » US Chapters- Reporting Year is June 1st through May 31st
 - » BAP Financial Fiscal Year is May 1st thru April 30th

REPORTING INTRANET

Faculty Advisors

- Create and manage officer login accounts.
- Review all chapter reports:
 - Beginning of Year - October 15th
 - Mid-Year Report – December 15th (award-seeking and petitioning chapters)
- Complete Student Hours Verification Report .
- Sign-Off on End-of-Year Report by June 1st.
 - Enter 990-N Submission ID.
- Meet with Chapter Reporter at least once each semester to review chapter reporting.
- Meet with Chapter Treasurer to ensure that all membership dues and chapter maintenance fee have been paid on time.

REPORTING INTRANET

Chapter Officers

- Perform all chapter reporting.
 - Enter new candidates into the system.
 - Prepare Beginning-of-Year Report.
 - Enter professional and service activities, Reaching Out activities and initiations. The members and candidates rolls should be current before professional and service activities are entered
 - Prepare Mid-Year reports (award- seeking chapters).
 - Prepare End-of-Year Report.
- Submit 990-N e-Postcard by June 1st.
- Work with faculty advisor to process all payments for membership dues and chapter maintenance fees.

CHAPTER HANDBOOK



Program for Chapter
Activities



Financial Reporting Guide

Constitution & Bylaws



Policy and Procedures
Manual

Code of Ethics

CHAPTER HANDBOOK



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“THE RULE BOOK”

PROGRAM FOR CHAPTER ACTIVITIES (PCA)

- The planning guide for chapter’s programs and activities
- Chapter Achievement Levels and minimum activities and activity hours (including non-BAP hours) to reach desired achievement levels
- Candidates-When to enter into the reporting intranet
- Reporting deadlines and requirements for beginning of the year, mid-year and end of year reports
- Initiation- How to report and how to handle candidate to member reclassification in reporting intranet

“THE RULE BOOK” continued

PROGRAM FOR CHAPTER ACTIVITIES (PCA)

- Exhibits with specific activities that qualify as:
 - Professional (Exhibit A)
 - Essential Skill professional activity options are detailed here
 - Reaching Out Activities (Exhibit B)
 - Service Activities (Exhibit C)

The “RULE BOOK”

PCA At-A-Glance

pdf on the left side
under the chapters link

PROGRAM FOR CHAPTER ACTIVITIES AT-A-GLANCE

CHAPTER REQUIREMENTS

Chapters must meet certain requirements depending upon the desired achievement level. The requirements include submission of reports, initiation, Reaching Out activities, professional activities and service activities. Chapters not meeting the mission based requirements will be placed on probation for the subsequent year.

A summary of the required activities by achievement level follows:

MINIMUM ACTIVITIES REQUIRED BASED ON CHAPTER ACHIEVEMENT LEVEL

Chapter Achievement Level	Beginning of Year Report	Mid-Year Report	Initiation	End of Year Report	Reaching Out Activities	Professional Activities <small>*Award seeking chapters must include at least 1 mandatory "Essential Skills" session.</small>	Service Activities
Mission Based	Yes	N/A	Yes	Yes	3	6	1
Distinguished	Yes	Yes	Yes	Yes	5	*6	1
Superior	Yes	Yes	Yes	Yes	8	*6	1

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

ACTIVITY HOURS REQUIRED FOR AWARD SEEKING CHAPTERS

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

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

Reporting Intranet Resources

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Financial Reporting Guide

- Treasurer reporting responsibilities:
 - Preparing EOY financial statements:
 - » Statement of Financial Position
 - » Statement of Activities
 - Filing Form 990

Financial Reporting Guide

- Treasurer reporting responsibilities:

Filing Form 990 (continued)

- Form 990-N (e-Postcard) if average annual gross receipts < \$50,000.
- Form is filled out on IRS website and a one-time registration form must be completed.
- Form cannot be filed until after April 30th.
- Chapter must use its unique EIN, not the BAP EIN.
- Find EIN on Reporting Intranet, Reporting & Membership, View/Update Chapter Profile

Financial Reporting Guide

- Treasurer reporting responsibilities:

Filing Form 990 (continued)

- FA must complete sign-off section in reporting intranet and a screen shot of the 990-N confirmation must be sent to Lisa Wicker lwicker@bap.org.
- If average annual gross receipts are > \$50,000, over \$50K spreadsheet must also be uploaded and FA must complete sign-off section in reporting intranet.
- If average annual gross receipts are > \$100,000 spreadsheet and an auditor's report must also be uploaded in addition to other requirements.

www.bap.org/chapters

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www.bap.org/chapters

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- Policy & Procedures Manual
 - Detailed explanations of membership eligibility and duties of officers

www.bap.org

Two more useful links:

ABOUT and JOIN

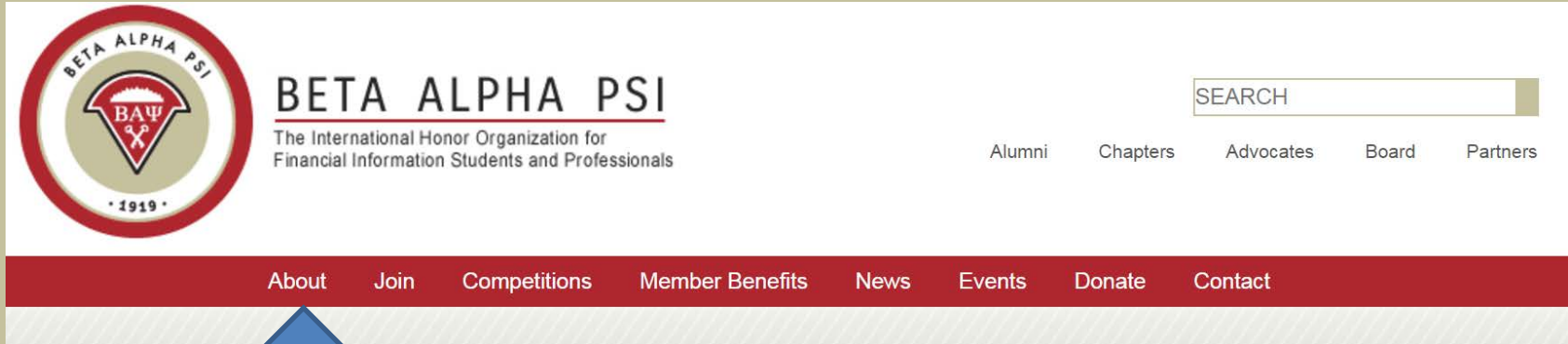


BETA ALPHA PSI

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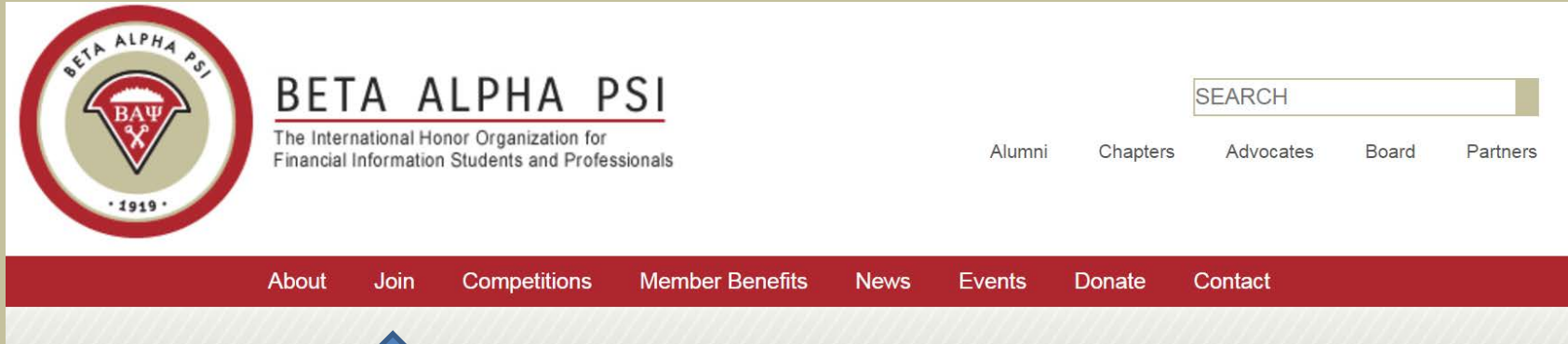
[Alumni](#)[Chapters](#)[Advocates](#)[Board](#)[Partners](#)[About](#)[Join](#)[Competitions](#)[Member Benefits](#)[News](#)[Events](#)[Donate](#)[Contact](#)

www.bap.org/about



- Bios and contact information on the Board of Directors, Professional Partners, BAP Staff and Chapter Advocates
- BAP Constitution and Bylaws (Articles III & IV on Candidate Status and Member Eligibility)

www.bap.org/join



- Eligibility (same information as bylaws, presented in a different format)

Where to Find Answers



- www.bap.org
- ***Your Region's Chapter Advocate***

Chapter Advocates



- ***ATLANTIC COAST REGION***

Arthur Reed, Bentley University

- ***MIDWEST REGION***

Outgoing: Mark Myring, Ball State University

Incoming: Dori Danko, Grand Valley State University

- ***NORTHWEST and WESTERN***

Sarah Bee, Seattle University

Chapter Advocates



- ***ROCKY MOUNTAIN and MISSOURI VALLEY***

Outgoing: Chris Lyon, Fort Lewis College

Incoming: Marci Butterfield, University of Utah

- ***SOUTHEAST REGION***

Eddie Nabors, University of Alabama at Birmingham

- ***SOUTHWEST REGION***

Kelly Noe, Stephen F. Austin State University

- ***OCEANIA REGION***

Outgoing: Brett Govendir, Univ. of Technology Sydney

Incoming: Julie Harrison, The University of Auckland

Where to Find Answers



- www.bap.org
- Your Region's Chapter Advocate
- ***Monthly Newsletter from BAΨ***
- ***Fellow BAΨ Faculty Advisors***
- ***Executive Office:***
 - Margie Fiorentino, Executive Director
 - Lisa Wicker, Manager - Chapter Services
 - Lauren Peck, Manager - Marketing

Annual Meeting Concurrent Sessions



Please attend the following:

- ***Faculty Advisor Exchange with Board, CAs, and Professional Partners:***
 - 1-01 Friday, 9:30 – 10:45 Columbia 3,4,6 **or**
2-01 Friday, 11:00 – 12:15 Columbia 3,4,6
- ***Program of Chapter Activities and Reporting Intranet:***
 - 3-01 Friday, 2:00 – 3:15 Columbia 3,4,6
or
➤ 6-01 Saturday, 11:15 – 12:30 Columbia 3,4,6

Entering Candidates



- Terms of Use Agreement
- Online Candidates
 - Graduate and undergraduate
 - Apply to students who are 100% online (the program is an online program)
- Payment of fees
 - Collect fees before entering candidate in intranet

Notable Policies



- ***Alcohol Policy***

Beta Alpha Psi prohibits the serving and consumption of alcohol products at any meetings, functions, or events that are sponsored, publicized or otherwise endorsed by Beta Alpha Psi.

- ***Professional Nature Policy***

While participating in the activities of Beta Alpha Psi, all members are expected to conduct themselves in a manner that is appropriate for financial information professionals.

- ***Solicitation Policy***

It is the policy of the Board to not permit chapter activities to be used as a conduit for the sale of products or services to students. Persons should not be asked to participate in a chapter activity if their participation is primarily promotional in nature.

Internal Controls



- There should be segregation of financial duties where possible.
 - All checks should require a signature from two chapter officers or a chapter officer and faculty advisor regardless of amount.
 - Receipts should be kept for all disbursements.
 - When received, cash and checks should be counted by two officers, and if possible, deposited by two officers. All checks should be restrictively endorsed “for deposit only” immediately upon receipt.

Internal Controls



- Bank reconciliations should be prepared monthly, reviewed, and approved by either the faculty advisor or a chapter officer other than the treasurer. This person should also verify two signatures are present on all checks if check images are included with the bank statement.
- Chapter officers or the faculty advisor should not approve anything they feel is questionable.

Reporting Requirements: Deadlines



Beginning of the Year Report (BOY):

- Plan of activities
- October 15th

Mid -Year Report (Award Seeking Chapters and Petitioning Chapters only):

- Report on activities
- December 15th

End of Year Report (EOY):

- Report on activities and financials
- June 1st

Note: Chapter Reporting Year is June 1st through May 31st

Financial Fiscal Year is May 1st through April 30th

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 - or
 - ✓ 6-01 Saturday, 11:15-12:30 in Columbia 3,4,6

Note: There are also several Reporting Intranet tutorial videos located at bap.org under the Chapters tab.



Thank you!

Questions?