



Program for Chapter Activities

2020-2021

INTRODUCTION

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

OBJECTIVES OF THE PROGRAM FOR CHAPTER ACTIVITIES

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

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

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

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

BETA ALPHA PSI POLICIES

CHAPTER ACHIEVEMENT LEVELS

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

- Mission based chapter
- Distinguished chapter
- Superior chapter

Chapters striving for the distinguished, superior and gold levels are considered award-seeking chapters.

RECOGNITIONS FOR AWARD SEEKING CHAPTERS

Annually, Beta Alpha Psi recognizes outstanding achievement as follows:

1. Up to 10 chapters receive the Gold Challenge Award and a financial award contributed by KPMG and the KPMG Foundation.
2. Superior Chapters receive a financial award contributed by KPMG and the KPMG Foundation and a recognition plaque or plate.
3. Distinguished Chapters will be recognized by Beta Alpha Psi.
4. The Most Improved Chapter receives the \$500 Nancy Harke Award.
5. Best Practices Awards sponsored by Deloitte are given each year based on criteria established by the Board of Directors.
6. Beta Alpha Psi Inclusive Leadership Awards sponsored by EY are available to approximately four chapters who made an impact on diversity and inclusiveness within Beta Alpha Psi and/or its respective school/community.
7. Project Run With It sponsored by Moss Adams LLP furthers the community service component of Beta Alpha Psi. Each chapter represented on a first-place team (three first place teams) receives a plaque (bearing the name of the participating student and chapter) and a cash award.
8. AICPA provides an annual award for the AICPA Medal of Inspiration.
9. The Grant Thornton Ethics Award is available for up to four chapters.
10. Chapters nominating winners of the Business Information Professional of the Year Awards receive an award sponsored by IMA.
11. Volunteer Income Tax Assistance (VITA) awards recognize achievement in the preparation of tax returns through an Internal Revenue Service program.

CHAPTER REQUIREMENTS

Chapters must meet certain requirements depending upon the desired achievement level (mission-based, distinguished, superior). The requirements include submission of the

following:

- Reports,
- Initiation,
- Professional activities (Exhibit A),
- Reaching Out activities (Exhibit B) and
- Service activities (Exhibit C).

Chapters not meeting the mission-based requirements (see below) are 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	Service Activities
<i>Mission Based</i>	Yes	No	Yes	Yes	3	6	1
<i>Distinguished</i>	Yes	Yes	Yes	Yes	5	*6	1
<i>Superior</i>	Yes	Yes	Yes	Yes	5	*6	1

* Award seeking chapters must include at least 1 mandatory “Essential Skills” session. (See pages 9 & 10)

In addition, to qualify as a superior or distinguished chapter, individual member/candidate professional and service hour requirements are necessary. These requirements encourage involvement of Beta Alpha Psi members and candidates in professional and community service activities.

ACTIVITY HOURS REQUIRED FOR AWARD SEEKING CHAPTERS

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

*For 2020-2021, superior requirements will be the same as distinguished requirements.

APPEALS OF CHAPTER ACHIEVEMENT LEVEL

Award seeking chapters will be notified of accomplished award status no later than July 1. A chapter may appeal its awarded level of achievement. Appeals must be in writing (e-mail is acceptable) and must be received by the Beta Alpha Psi Executive Office within 10 business days of the receipt of notification of award status. The letter of appeal should include evidence in support of the appeal. Any appeals will be forwarded by the Executive Office to the Chapter Advocacy Council (CAC). The CAC review the appeal and vote to uphold the award level or award a higher chapter achievement level based on the facts and

circumstances of the appeal. All decisions of the CAC are final.

ACTIVITY TIME

For the purpose of measurement of an activity's time, an hour consists of a 50-minute session. Thus, an activity lasting 50 minutes will be awarded an hour of service or professional activity time while an activity lasting 60 minutes will be awarded 1.2 hours of professional or service activity time.

NON-BAP HOURS

BAP members/candidates are permitted to partially fulfill Professional and Service activities by participating in non-BAP sponsored events. Specifically, each member/candidate of a BAP chapter may accumulate up to ten hours (500 minutes) per year of professional activities and a maximum of ten hours (500 minutes) per year of service activities not sponsored by their BAP chapter. These hours should be reported as a single professional or service activity on the Reporting Intranet online activity screen. Fall and spring/winter hours should be reported separately. Chapters must retain detailed information regarding the non-BAP activities until October 1 of the following year.

MEMBERSHIP OPTIONS

As a result of COVID-19, many schools face the uncertainty of their campuses being open or continuing with an online curriculum for the 2020-2021 reporting year. Beta Alpha Psi is adapting to each possible scenario. Chapters should consider offering students eligible for membership to join via the standard undergraduate or online membership. Online student membership will allow students to participate in professional sessions virtually and contribute service hours individually. Suggestions for online professional development and service activities are provided below in Exhibit A and Exhibit C.

THE ONLINE STUDENT

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

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

CANDIDATES

Candidates should be entered into the Reporting Intranet **on a monthly basis**. ***Do not enter candidates into the system until the \$75 fee has been collected.*** Be sure all

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

Within 60 days of a candidate being entered into the system, the chapter must pay a one-time, **non-refundable** fee of \$75 to the Executive Office via credit card or check. The check should be made payable to Beta Alpha Psi and include the chapter number on the memo line of the check. A list of candidates for whom the check relates should accompany the check. An invoice with the list of candidates may be printed from the reporting website. For payments made after 60 days, a late fee of \$20 per candidate will be charged.

While the Executive Office and Board encourage accepting online students as candidates, the mechanism for measuring professional and service participation level is left to the discretion of each chapter.

TRANSFER MEMBERS

Chapters must contact the Executive Office in writing for verification of transfer members. Once the Executive Office has confirmed the transfer student is a member of BAP, the new chapter will enter them into the Reporting Intranet as a new candidate. The Executive Office then credits the \$75 fee. If the transfer member requests a certificate from the new chapter, the chapter must pay the \$15 processing fee.

BEGINNING-OF-YEAR REPORT

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

All Oceania Region chapters must submit the Beginning-of-Year Report by **June 15**.

Submitting the Beginning of Year Report

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

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

MID-YEAR REPORT

All US Chapters must declare themselves as award seeking (if applicable) on the Chapter Profile page by **December 15** and complete fall semester reporting by **December 15**. In addition, ALL petitioning chapters are required to complete a mid-year report, whether

award seeking or petition based.

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

END OF YEAR REPORT

All US chapters must prepare and submit an End of Year Report by **June 1**.

All Oceania chapters must complete the End of Year Report by **December 15**.

NOTE: Failure to file the End of Year Report by the deadline will result in a \$100 late filing penalty.

Submitting End of Year Report: Go to the “Enter End of Year Report” tab in the Reporting Intranet and:

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

In order to qualify as an award chapter, all required chapter reporting must be

completed by US chapters by June 1. All Oceania chapters must complete reporting by Dec 15. Only under extreme circumstances will exceptions be considered by the Board.

INITIATION

All chapters must hold at least one formal Initiation\Installation event each year. During the event, officers will be installed and new members will be initiated using the procedures defined on the BAP website (<https://www.bap.org/initiations>). Initiations "in absentia" will only be allowed under extreme circumstances approved by the Board President.

Chapters may choose to have a second Initiation\Installation event during the academic year. This event qualifies as a reaching out activity (ROA).

Reporting Initiations/Installations to the Executive Office: All installations and initiations are to be reported to the Executive Office. When a candidate is initiated, the student should be moved from candidate to initiate status on the Reporting Intranet. This serves as notification to Executive Office to print membership certificates. If the chapter wants to receive membership certificates in time for the ceremony, Executive Office must be notified at least two weeks prior to initiation. Requests for certificates to be sent overnight delivery will cost \$50.

Exhibit A: Professional Activities

All chapters are generally required to report at least six professional activities per year. However, in response to the impact of COVID-19, six professional activities are highly encouraged, but not required for 2020-2021. In addition, professional activities may be conducted on campus, virtually, as a chapter, or individually. The minutes from each member/candidate professional session (on-campus or online) should be reported as:

- Individual Professional Development (identify as Essential Skill or Professional Development) or
- Virtual Professional Meeting (reported the same as any on-campus professional activity).

Chapters can pick and choose professional topics from the PCA list below.

- Chapter professional meetings
- Webcast and Webinar Resources from our Professional Partners (available on our [website](#))
- Joint meetings with professional organizations
- Joint meetings with on-campus organizations
- Local seminars/workshops (not those involving "paid" tuition)
- Field trips and Office Visits
- Meet-the-Firms Night or Activity (must be a single event where multiple firms are represented and purpose is to provide a significant number of students with information about various firms and industries. This should not be strictly a recruiting event)

- Excel certificate program
- Publications (articles or news notes for newsletter; copy of publication must be submitted to the Executive Office for credit)
- Executive-in-Residence/Professor-for-a-Day programs (time based upon the time a member/candidate attends sessions “taught” by the guest)
- Mock interview activity (must be an event where multiple firms are represented and all member/candidates are eligible to participate, not a recruiting event)
- Activity or meeting with a professional organization
- Social activities with professionals – up to two activities per year with a maximum time of 1 hour (50 minutes) per activity
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- Student Driven Professional Sessions – Chapters can invite professionals to attend a BAP meeting (in-person or virtually) where the students present on various technical topics.

Credit is not given for prospective candidate meetings, chapter orientation meetings, chapter organizational meetings, chapter business/planning meetings, firm information sessions, initiations and other similar activities that provide no professional component.

Essential Skills

Many students seek to obtain internships and full-time job opportunities through Beta Alpha Psi; however, once they have the job, they must develop their “essential skills” in order to succeed professionally. To aid this development, award-seeking chapters (distinguished and superior) must conduct one mandatory professional session devoted to “Essential Skills.”

Each chapter chooses one of the below topics for its Essential Skills session:

- **Business Writing Skills** – Business writing skills are different from academic writing. This session conveys the basics of business writing skills that include standardizing, streamlining, and reinforcing a company’s corporate culture by communicating in a professional manner.
- **Facilitation Skills** – This session helps students learn what to expect in a professional situation involving a group discussion format. Learn how to create an inclusive environment to achieve group goals.
- **Managing Distractions** – Emails, phone calls and co-workers stopping by your desk to talk creates distractions. This session covers how to handle inevitable disruptions and remain focused and productive.
- **Ethical Decision-Making Skills** – Accountancy is based on trust. This session distinguishes one’s core values and ethical decision-making.
- **Negotiation Skills** – Negotiation skills are extremely important in maintaining focus in one’s career. This session covers the basics of negotiations, information gathering, learning to listen, leveraging the situation, goals of the negotiation, costs of the negotiation, the bargaining phase and closing the negotiation process.
- **Conflict Management** – Conflict in the workplace is a reality professionals encounter at some point in their careers. This session includes tips on how to

quickly identify conflict, assess the issue, managing oneself and the parties involved and professionally resolving the issue.

- **Change Management** – This session assists students in understanding what to expect and how to deal with change in the work environment whether it will be a departmental change or organizational change.
- **Emotional Intelligence** – Studies have shown people with high emotional intelligence have greater mental health, exemplary job performance, and more potent leadership skills. This session includes identifying a person’s EQ and how to improve EQ.
- **Interpersonal Skills at the Workplace** – Working with others is essential to networking and engaging with coworkers and clients. This session focuses on developing these skills and applying them to the workplace.
- **Diversity and Inclusion** – At the workplace there are many diverse voices. Inclusion is respecting and valuing those voices. This session defines diversity and inclusion and states aspects for managing and building diversity.
- **Accepting Feedback** – The ability to accept feedback and learn from it is essential to individual development and growth. This session includes tips and strategies for accepting and delivering healthy feedback.

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

Exhibit B: Reaching Out Activities

All chapters must participate in Reaching Out activities during the year. The following number of activities are required for each achievement level:

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

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

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

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

The following list includes items qualifying as Executive Office Sponsored Reaching Out Activities:

- Live virtual session attendance 
- Live Virtual session CSD presentation attendance
- Virtual Presentation (Best Practices and/or Chapter Operations)
- Hosting or co-hosting Regional Meeting – verified by Chapter Advocate
- Regional Meeting Attendance*
- Regional Meeting Presentation
- Nomination for Business Information Professional of the Year
- Nomination for Outstanding Dean
- Nomination for Project Run With It
- Participation in EY Inclusive Leadership Award
- Donation of 100 books to support literacy
- Mentoring a Developing Chapter – this mentoring relationship should be approved and supervised by the Chapter Advocate for your region.
- Submission of a “Spotlight On” article for the Beta Alpha Psi newsletter – article must be accepted for inclusion in a future newsletter edition.
- IS & Finance Interaction
- Participation in Grant Thornton Ethics Award
- Promotion of Executive Graduate Membership Program
- All current members join Member and Alumni Network

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

In addition to the items listed above, BAP chapters may sponsor Reaching Out Activities. For each Reaching Out Activity sponsored by the Chapter, upload a brief paragraph describing the activity on the Reporting Internet. For example, a Promoting Careers activity may read as follows:

“On November 5, our chapter hosted 70 high school students on campus to learn about the accounting profession. This event was sponsored along with our state society of CPAs with presentations by CPAs from practice and industry, as well as a panel of our students. The event lasted 4 hours.”

Other examples of ROA’s sponsored by Chapter include:

- Virtual Wellness Session for Members and Candidates
 - This is event emphasizes living well at home and may include virtual fitness classes, mindfulness sessions, weight management and nutrition sessions, importance of sleep and exercise sessions, health and wellness webinars.
- Multi-Cultural Professional or Global Leadership Competency Event
 - This event incorporates a multi-cultural theme conveying the importance of understanding how all cultures help to promote a healthy work environment from an international or global perspective. Each chapter should consider incorporating these policies into their local chapter best practices
 - Inviting professionals to share experiences in working in a multi-cultural environment and the impact it has had on their company’s bottom line.
 - Inviting local community leaders to share how their experience working with local multi-cultural businesses and relevant community service has

helped in building a stronger and more dynamic community.

- Minority Recruitment Event (may report 2 per year – may be done virtually)
 - Presenting career information to minority groups or engaging in activities oriented toward the retention of minority students. For purposes of this section minorities are those who are under-represented in the accounting, finance and information systems fields, i.e., Native Americans, Hispanics, and Black Americans.
 - The career orientation program(s) or activities should be directed toward minority students at the high school level or undecided minority university students.
 - Career materials are available from a variety of professional organizations. These presentations are intended to be in the nature of group sessions. Booths at career fairs, activity fairs, "rush" events, or regular chapter meetings do not count in this category.
 - Other possible projects include special tutoring sessions solely for minority students, counseling sessions, mentoring programs exclusively for minority students, transition year counseling, and other types of activities oriented toward retention. Collaboration with organizations such as NABA or ALFA are encouraged. Below are examples of available resources:
 - AICPA Diversity and Inclusion
<http://www.aicpa.org/career/diversityinitiatives/pages/resourcesforstudents.aspx>
 - NABA student programs:
<http://www.aicpa.org/career/diversityinitiatives/pages/resourcesforstudents.aspx>
- Multi-Chapter Event
 - A professional or service activity co-sponsored with another Beta Alpha Psi chapter. In order to promote interaction between chapters, this co-sponsored event should involve at least 25% of each chapter's current membership. Virtual multi chapter events are welcome. BAP allow one "multi chapter webcast" meeting per year. Chapters who conduct a webcast meeting will have to provide documentation proving noting it incorporated controls to ensure members who logged in actually participated and were engaged in the webcast.
- Promoting Careers in Accounting/Finance/Information systems (may report two per year)
 - This includes career orientations related to accounting, finance and information systems presented to pre-decision college students, college students from other majors, or junior high and high school students. Beta Alpha Psi events or programs presented to prospective Beta Alpha Psi candidates which are designed primarily to promote the areas of accounting, finance, and information systems to undecided students but that have as a secondary effect promoting Beta Alpha Psi are acceptable. Virtual career fairs are acceptable to include online students from AACSB accredited

online programs. Beta Alpha Psi orientation sessions for members/candidates do not qualify.

- Alumni Activity
 - A major event to promote communication between alumni and their alma mater. This event involves participation of at least 25% of the current chapter membership as well as a significant number of alumni.
- Literacy and/or College Application (or similar) Program
 - Chapters can participate in the events below or similar programs within its community; alternative programs must receive prior approval from the executive office in order to qualify.
 - [*Points of Light*](#) is organizing Make a Difference Day on Saturday, October 24, the largest national day of community service. It is a global event so all chapters/teams could participate.
 - [*American College Application Campaign*](#) is an organization that organizes events at inner city or rural high schools where volunteers will help student complete college applications in the fall. BAP students would be a great resource for high school students to understand the application/college process.
- Second initiation
 - All initiations should be reported in the Reporting Intranet and the second initiation should be reported as a Reaching Out activity.

Exhibit C: Service Activities

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

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

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

Chapters seeking Distinguished or Superior award levels must also report a minimum number of service hours per member/candidate. Service hours to report are:

- Distinguished chapters - 8 service hours per member/candidate
- Superior chapters - 8 service hours per member/candidate.

Although there is a minimum number of 8 hours for Distinguished and Superior chapters in the professional and service categories, the total number of hours must be 20 for Distinguished and Superior chapters.

To be reported as a service activity sponsored by Beta Alpha Psi, the event either:

- (1) must be organized and carried out by the Beta Alpha Psi chapter or

- (2) must involve participation by the members of the Beta Alpha Psi chapter as a group (in which case the chapter agrees to participate as a chapter and has promoted participation in the event).

Any money received from a service activity must be donated to a charitable organization or used for a charitable cause. Activities for which members receive course credit (with the exception of VITA) are not considered service activities. Finally, donating non-perishable food items to a non-profit organization cannot serve as a substitute for a service activity.

A definition and examples of service activities are provided below.

Definition of Service Activities

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

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

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

Activities *not* constituting community service include:

- assisting friends or family
- volunteering to participate in events where the underlying purpose is recruitment

Examples of Service Activities:

- [Online Service Activities](#) such as Operation Gratitude, Cardz for Kidz!, and Neighborly "Write Your Neighbor,"
- Volunteering for non-profits such as: Habitat for Humanity, Big Brothers/Big Sisters, Junior Achievement, Recordings for the Blind, Adopt-a-highway, Adopt-a-trail, Adopt-a-family, and service activities sponsored by religious organizations
- Organizing and/or participating in a charitable event such as: Fund raising projects for charity, Food drives (note: must organize, not just donate), soup kitchens, blood drives, walk-a-thons, bowl-a-thons, coaching youth teams
- Volunteering to assist with university events/activities including university

telethons, assisting the career placement office with a career fair and/or proctoring exam for a department.

- Organizing a Financial Literacy event or similar activity
- Volunteer Income Tax Assistance – VITA training time is counted as professional hours and VITA tax preparation time is counted as service hours, regardless of any academic credit earned. Each chapter reporting VITA as a service activity will be required to submit the VITA Summary Report to the IRS. You can find the report here: <https://www.bap.org/volunteer-income-tax-assistance>.
- Host Annual Meeting or Regional Meeting – Hours will be determined by the Meeting Chair, Chapter Advocate and/or sponsoring University
- Consultation with on or off-campus organizations about tax matters, bookkeeping, information systems, or other work of a technical nature
- Tutoring sessions - group, e-mail, or one on one - without monetary compensation. Tutoring sessions count if the sessions were scheduled and are documented, regardless of whether anyone attends. Please report this activity as a single service activity per semester on the mid- year and/or end-of-year workbook
- Mentoring of other chapters (a chapter must receive pre-approval of its Chapter Advocate)
- Create/update chapter web page (up to a maximum of 10 hours for creating and three hours for updating)
- Chapter officers and committee chairs may receive up to 10 hours for their time providing service to the chapter. A maximum of 10 hours each may be reported for up to 10 officers and committee chairs. Please report this at the end of each semester or at the end of the year on a single report. The limit of 10 is for the year, not by semester or quarter.