



## 2019 Regional Meeting Host Chapter Manual

*Last updated: August 15, 2018*

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### REGIONAL MEETING PURPOSE

1. Provide BAP members and candidates the opportunity to gain knowledge regarding
  - a. Personal and professional issues they will encounter as they transition from student to professional; and,
  - b. Best Practices, Chapter operations, and activities
2. Provide leadership development and build professional and/or social relationships between chapter members and
  - a. Other chapters' members;
  - b. Professionals (alumni, Professional Partners and other professional speakers);
  - c. Members of the academic community; and,
  - d. The Beta Alpha Psi organization and its leaders

### OVERVIEW OF RESPONSIBILITIES

#### *Responsibilities of Host Chapter(s)*

- Utilize Regional Meeting folders and files in DropBox
- Faculty advisor and student representative participates in all conference calls and student documents meeting minutes
- Select keynote speaker candidates -Professional Partners Liaison vets candidates (See Appendix A)
- Work with the Professional Partners liaison to select speakers and topics for professional sessions that are **appropriate for the theme of the meeting** (See Appendix D)
- Do a headcount of attendees in professional sessions and alumni panel. Submit results to Chapter Advocate
- Communicate meeting information to chapters via email (See Appendices G1, G2, G3 and M)

- Determine Chapter Operations topics, communicate topics with chapters, review and accept or reject abstract submissions (See Appendices E, H and H1)
- Provide information for the Regional Meetings Webpage per Executive Office request
- Prepare the program for submission into the BAP app and email distribution.
- Provide student members to man the registration table, answer questions from participants, post meeting room session titles & times, collect Best Practices presentations, act as room monitors, and provide support in other jobs as needed (See Appendix K)
- Have student representative speak during meeting opening and closing sessions (See Appendix L)
- Inform Executive Office and conference planner of use of \$1,000 stipend PRIOR to early bird hotel registration deadline
- Organize optional Friday night activity

#### *Responsibilities of Chapter Advocate*

- General oversight of the regional meeting
- Offer advice and assistance before, during, and after the regional meeting
- Serve as the conference call chairperson and lead all scheduled calls
- Emphasize importance of program content, facilitate meeting all deadlines, and keep everyone motivated to complete tasks (See Appendix B)
- Check off tasks as completed in Appendix B
- Approve the program and all final reports
- **Assume responsibility for the notification of eligible Best Practices abstracts** (see Appendices H2 and H3 and the Best Practices Manual)
- After the meeting, via email, provide Best Practices judges' feedback to chapters that did not win
- Follow the script and serve as master of ceremonies for the opening and closing sessions (See Appendix L)
- Assist the attending president in moderating the Board, Professional Partners and Faculty Advisors breakfast (See Appendix L)
- Moderate the Faculty Advisors with Chapter Advocate session (See Appendix L)
- Collect information from the host chapter on professional session and alumni session attendance
- Update the Regional Meeting Host Manual and Appendices in Dropbox (3<sup>rd</sup> year chapter advocate on faculty advisor track)
- Lead Regional Meeting Host Chapter session at the annual meeting (3<sup>rd</sup> year chapter advocate on faculty advisor track)

#### *Responsibilities of Conference Planner*

- Oversee the planning process and on-site meeting management
- Participate in all conference calls

- Ensure deadlines are met and all parties involved are aware of location and hotel-related issues
- Prepare periodic reports of registrants and provide them to the host chapter(s) and Chapter Advocate
- Assume full financial and managerial responsibility for all services provided by hotel facilities

#### *Responsibilities of Professional Partners Liaison*

- Communicate all meeting information with the attending professional partners
- Arrange and/or conduct the Friday afternoon leadership session
- Participate in all conference calls
- Vet the host chapter keynote speaker candidates and, if necessary, assist the host chapter in securing the keynote speaker. Contact keynote to reiterate expectations (See Appendix A)
- Obtain speakers for professional sessions (See Appendix D)
- Ensure that professional sessions are organized and conducted appropriately (See Appendix A for speaker guidelines)
- Ensure that Best Practices competitions have adequate Professional Partners staffing
- Speak about Professional Partners' role in BAP during the opening session, breakfast with faculty advisors and the BAP Board and lunch with chapter presidents (See Appendix L)
- Announce Best Practices results during closing session (See Appendix L)

#### *Responsibilities of the Executive Office*

- Post the regional meeting host manual
- Provide Chapter Advocate with current email addresses of faculty advisors and chapter presidents
- Provide the conference planners and host chapters with meeting supplies:
  - Attendee giveaways
  - Name badge inserts and badge sleeves
  - Gifts for guest speakers
  - Marketing materials
  - Thank you cards for guest speakers
  - Best Practices certificates and frames
- Create and maintain Regional Meeting webpage and meeting app
- Provide Social Media Toolkit
- Send out and collect responses for electronic survey to regional meeting attendees
- Collect the post meeting reports from the host chapters with signature from Chapter Advocate
- Provide opening session PowerPoint and closing session awards PowerPoint

#### *Responsibilities of Alumni Representative*

- Plan alumni panel discussing career experiences (See Appendix D)

- Plan any other sessions as delegated
- Participate in all conference calls
- Speak about Alumni Representatives' role in BAP during the opening session, breakfast with faculty advisors and the BAP Board and lunch with chapter presidents (See Appendix L)

## **OVERVIEW OF REGIONAL MEETING SESSION RESPONSIBILITIES**

### **INITIAL PLANNING**

*Locations, Host Chapters, Dates, and Facilities*

1. Chapter Advocate and Faculty Advisors from each region: Identify the host chapter(s) no later than 12 months prior to the meeting.
2. As soon as possible after being designated a Host Chapter, the Host Chapter should:
  - a. Attend the 2019 Regional Meeting Host Chapters session at the 2018 annual meeting. At least one representative from each host chapter must attend.
  - b. Become familiar with all the regional meeting appendices in Dropbox. Pay particularly close attention to the meeting deadlines in the Regional Meeting Calendar in Appendix B;
  - c. Create a student leadership structure to facilitate planning and execution of a successful meeting; and
  - d. Consider keynote speech candidates (See Appendix A)
  - e. The Chapter Advocate will notify host chapter regarding which Professional Partners are assigned as a liaison for the regional meeting. The Professional Partners are great resources and expect to be actively involved in the meeting. PLEASE contact only this liaison with ANY request for assistance from Partners. It is NOT appropriate to contact local offices of Professional Partners Members to solicit support.
  - f. The Host Chapter(s) may not contact the hotel at any time, unless the Conference Planner specifically authorizes that contact.
  - g. General program guidelines:
    - i. BAP policies must not be violated;
    - ii. The theme set forth by the President Elect and the Board of Directors must be incorporated throughout the entire meeting;
    - iii. Partners should be fully engaged throughout the meeting doing presentations, judging, participating in panel discussions, etc.; and
    - iv. Where possible, students should actively (rather than passively) participate in all events.
    - v. Planned offsite activities are NOT permitted unless approved by the Executive Office.
3. The Conference Planner negotiates and finalizes contracts for technological and food requirements.
  - a. All communications regarding these matters must be made by the

Conference Planner.

- b. BAP will not assume any responsibility nor be held accountable for any legal issues that may occur if this procedure is not followed.

### **Opening Session (See Appendix L)**

- Chapter Advocate and host chapter welcome all attendees and formally introduce every attending board and Professional Partners member.
- BAP attending President introduces the meeting theme in opening remarks.
- One of the Professional Partner liaisons will come up to talk a little about the professional partners.
- Chapter Advocate and host chapter will explain how the meeting relates to the current year's theme. Host chapter student will introduce the keynote speaker.

### **Plenary Session (See Appendix A)**

Host chapter selects the keynote speaker or professional activity after consultation with the Professional Partners liaison and Chapter Advocate (*The most important decision for the regional meeting is the choice of the keynote speaker. The keynote speaker sets the tone for the entire meeting.*)

### **2019 – Leadership Activity - TBD**

- Professional Partners liaison is responsible for planning this session. Host chapter will assist in setting up the activity.

### **Chapter Operations Sessions (See Appendix E)**

- The host chapter chooses sessions and chapters to make presentation. Please include a “wild card” or “open” category.

### **Professional Sessions**

- Host Chapter works with the Professional Partners liaison to choose topics of interest for the sessions. (See Appendix D)

### **Best Practices Competition sponsored by Deloitte**

- See Best Practices manual for duties and tasks related to this competition. (See Appendix K for host chapter responsibilities at meeting)

### **Board, Professional Partner, and Chapter Advocate Meeting with Chapter Presidents (See Appendix L)**

- Chapter Advocate, including the Board and Partners representatives, address key topics noted throughout the year discussed in conference calls and meetings.

**Faculty Advisors Meeting with Chapter Advocates (informal discussion and idea exchange) (See Appendix L)**

- Chapter Advocate oversees this meeting and discusses critical issues noted throughout the year.

**Board and Professional Partners Meeting with Faculty Advisors (See Appendix L)**

- Chapter Advocate, including the Board and Professional Partners representatives, address key topics noted throughout the year discussed in conference calls and meetings.

**Closing Session (See Appendix L)**

- **Best Practices winners are announced by representatives from Deloitte or Professional Partners liaison(s).**
- Chapter Advocate summarizes the meeting and includes a final expression of thanks to the host chapter, members of the board and Professional Partners in attendance as well as any other presenters and program participants
- Host chapter can make thank-yous
- Chapter advocate thanks everyone
- Banner is passed from current host chapter to subsequent host chapter
- Meeting is adjourned

# HOST CHAPTER OFFSET COMPENSATION

The host chapter(s) will receive a \$1,000 per region for reasonable and necessary meeting expenses. Such offset compensation shall be used to fulfill the region's meeting planning goals and must be approved by the Executive Office and Chapter Advocate.

Host chapters will have \$1,000 per region to cover the cost of:

- a. Student registrations
- b. Hotel accommodations or
- c. Other reasonable and necessary meeting expenses to fulfill the region's meeting goals and agenda (subject to Chapter Advocate and EO approval).

Please note that

- a. the \$1,000 is per region not per host chapter.
- b. the CA will work with host chapters to allocate the \$1,000 based on the expenditures required to fulfill the meeting goals. The allocation can be but does not have to be equally split between host chapters if there are two host chapters in a region. The split should be based on the size of the chapters and the number of student participants/volunteers.
- c. The \$1,000 is not funds (i.e., a check) distributed to the host chapter but is only an offset or reduction in the fees charged (i.e., the Conference Planner will book the rooms for the chapters or the student registration would be waived or reduced appropriately). Please work with the Conference Planner for registrations and/or rooms you wish to be applied towards the \$1,000. If the region does not use all of the \$1,000, then it is lost. It will not be carried forward annually.
- d. The host chapter must communicate the desired use of funds via email to the executive office and conference planner PRIOR to the early bird hotel reservation deadline.