



## **Best Practices Procedure Manual**

Sponsored by Deloitte

2023/2024 Academic Year

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# Program Summary & Awards

Deloitte has been the proud sponsor of the Best Practices program since 2001. The program encourages Chapters to develop and execute programs that promote awareness and student involvement in projects exemplifying values shared by BAP and Deloitte. Each year, the BAP President Elect and the Deloitte Professional Partners select topics to capture and promote their organizations' shared values. Topic examples include ethics, diversity, corporate responsibility, increasing awareness of the accounting profession, skills-based volunteerism, and globalization. To date, there have been over 4,000 individual and team presentations at the Regional/Mid-Year and annual meetings and nearly \$750,000 awarded to BAP chapters to support chapter operations, scholarships, and the continuation of best practices projects.

The Best Practices competition comprises the following process:

1. Chapters submit an online form by the stated deadline that addresses the individual Best Practices Topics. Chapters may submit 1 submission per category but are not required to enter a submission for each category. Along with their submission, the chapter will indicate the Mid-Year meeting(s) location they are interested in attending.
2. The top submissions for each category will be invited to present at the Mid-Year meeting your chapter is attending.
3. The top 2 teams from each category at the Mid-Year meeting will be invited to advance to the Annual Meeting where winning chapters earn verbal recognition and additional monetary awards.

Deloitte funds all Best Practices competitions. The Board of Directors and Deloitte set award levels, which are nonnegotiable, and the BAP Executive Office pays monetary awards to the chapters.

At the Mid-year meeting, there is a first, second, and third place award for each Best Practices category. A complete list of categories is available on the BAP website. See table below for monetary award levels:

Deloitte Best Practices award summary (each topic presented)				
Level of competition	First	Second	Third	Total awards
Mid-Year (5)	\$750	\$450	\$200	\$21,000
Annual Meeting (1)	\$1,500	\$1,000	\$500	\$9,000
				<b>\$30,000</b>

# Timeline of Events

## August – December

- Best practices topics, guidelines and deadlines communicated to all chapters and chapter advocates.
- Professional Partners Chair and Chair Elect form judging teams for Mid-Year meeting submissions.
- Chapters determine topics to participate in, execute the project, and prepare submission form.
- Chapters complete and submit their final submission for Best Practices via the BAP website **no later than 11:59PM ET on Sunday, December 3rd, 2023.**
- Please note that each chapter can only present at one mid-year meeting but can provide a first and second choice of locations.
- BAP and Deloitte will review the submissions the week of December 4<sup>th</sup>. All chapters will be notified by December 8th if they are selected to present at their first location preference.
- If a chapter isn't selected to compete in Best Practices at their first location preference, they will be offered the option to be considered against other submissions at their second location choice.
- The chapter can ultimately decide which meeting they would like to attend if they intend to compete in Best Practices.

## January– May

- Once selected to present, chapters prepare their Best Practice presentations for the Mid-Year meeting they are confirmed to attend.
- Live presentations for each category are a maximum of 8 minutes followed by 2 minutes of Q&A. Only students from the BAP chapter are eligible to present.
- The Professional Partner Chair and Chair Elect communicate judging expectations to Best Practices judges.
- Judges attend Mid-Year meeting to evaluate presentations and determine Mid-Year winners.
- The top 2 teams from each category will be announced at the closing session of each Mid-Year meeting.
- Top 2 teams from each category and Mid-Year meeting notify BAP Executive Office of intention to compete at the Annual Meeting **no later than 3:00 p.m. ET on May 31.**

### Key Dates

**Sunday, December 3rd, 2023 by** Final Best Practices submissions due to BAP website  
**11:59PM ET**

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## Key Dates

### February – March

Attend one of the following Mid-Year meetings with your chapter:

- 2/9 – 2/10/2024 – Atlanta, GA
- 2/16 – 2/17/2024 – San Diego, CA
- 2/23 – 2/24/2024 – Dallas, TX
- 3/8 – 3/9/2024 – Indianapolis, IN
- 4/13 – 4/14/2024 – Auckland NZ

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### May 31 by 3:00 p.m. ET

Top 2 teams from each category and meeting notify BAP Executive Office of intention to compete at the Annual Meeting

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# Roles and Responsibilities

## Chapter Advocates

- Chapter Advocates do not have a responsibility in the competition beyond supporting the chapter as they prepare and execute their Best Practices presentations (if applicable).

## Participating Chapters

1. Determine Best Practices projects, plan and execute event, and submit final submission
  - Timing: August – January.
  - Detail: Participating chapters determine which categories they will compete in shortly after the announcement of the Best Practices categories. Chapters may find that designating a committee at the beginning of the Fall semester or quarter allows them to conduct the appropriate research and formulate plans.
2. Prepare submission form
  - Timing: Prior to deadline.
  - Additional details can be found [here](#).
3. Prepare presentation once notified of selection to present at Mid-Year meeting
  - Timing: Prior to the Mid-Year meeting.
  - Detail: The submitting chapter prepares a live presentation based solely on the information provided about the competition. Please see Appendix B for presentation guidelines.
4. Attend Mid-Year meeting and present Best Practices
  - Timing: Various dates depending on the Mid-Year meeting your chapter is attending
  - Detail: Attend Mid-Year meeting and present on all topics your chapter was selected to address. Only BAP students are eligible to present. This is an amazing opportunity to practice your presentation skills in front of Professional Partners (professionals from various disciplines).

# Mid-Year Meeting

## Presenting Chapters

- Chapters invited to present at the Mid-Year meeting must prepare a presentation outlining their response to the Best Practices prompt.
- Present the substance of their efforts or vision within 8 minutes followed by 2 minutes of Q&A. Reference Appendix B for guidelines.
- Only BAP students are eligible to present during the Mid-Year meeting (no faculty advisors, alumni or members of outside organizations are eligible to present).

## Judging Results

The Professional Partners Liaison selects judges independent of any student, college/university, and chapter affiliation. These judges are given the procedures and policies of the program and are expected to act accordingly to judge the presentation based on preset guidelines.

- The First place winning teams will receive written and verbal feedback from judges on content and/or presentation.
- Second and third place winning teams will receive written feedback via judge's evaluation form, which will be sent from the BAP Executive Office to the Chapter Advisor to share with participating chapters.
- Non-placing teams will receive feedback that provides developmental themes for all teams that competed in the category. Feedback may or may not be specific to each chapter but rather more general themes that the judges saw throughout the competition.
- Results, once submitted to the Chapter Advocate, are final.

# Annual Meeting

## Eligibility to Compete

- The top two Best Practices winners from each category at each of the Mid-Year meetings are eligible to compete in the Best Practices competition at the Annual Meeting.
- As soon as possible, after receiving a top placement award, winning chapters must notify the BAP Executive Office or designated coordinator of their intention to attend and compete at the Annual Meeting.

## Presentation Guidelines

- All guidelines for the Annual Meeting are consistent with guidelines for the Mid-Year competition. Reference Appendix B for Presentation Guidelines.
- Winning teams that will be competing at the Annual Meeting are permitted to make updates to their presentations.
- The online form itself must essentially be the same as provided at the Mid-Year competition, while minor editorial/grammatical changes, reordering of major points, and updates to any results are permissible.
- Updates on progress made between the Mid-Year meeting competition deadline and the Annual Meeting should be included in the presentation.

## Judging Results

- Final results are announced at the closing session of the Annual Meeting.
- Chapters will **not** receive feedback following the presentations at the Annual Meeting.
- All results are final and non-negotiable.



# Appendix A

## Online Form Guidelines

Thank you for participating the BAP Best Practices Competition. The online form is a summary of the most important aspects of your project/idea. Information provided within this form, must concurrently be a summary of your presentation.

Chapters must submit their online form via the BAP website **no later than the stated [deadline](#)**.

The following actions may result in disqualification:

- Failure responding to any of the questions on the submission form
- Emailing your submission to your Chapter Advocate or to [bap@bap.org](mailto:bap@bap.org)
- All late submissions will automatically be disqualified

The online form needs to be started and submitted in one session. We highly recommend typing the responses for the form in a word document and cut/paste to complete the online form. Below are the questions included on the form.

### Chapter Information

- Student Contact
- Student Contact Email
- Faculty Advisor Name
- Faculty Advisor Email
- University Name
- College of Business Name (if applicable)
- Chapter Name
- Mid-Year meeting preference (rank locations you are open to attending)
- Topic(s)

### Questions

1. Provide an overview of your Best Practice: (max 175 words)
2. What are the primary goals of the project? (max 175 words)
3. What are the outcomes or expected outcomes if the project is yet to be completed at the time of submission? (max 150 words)
4. Number of members participating in project
5. Description of non-member participants and their roles (max 75 words)
6. Number of hours spent on project
7. What are the benefits to the chapter and others served by the project (i.e., lessons learned)? (max 80 words)
8. Is this project adaptable to other chapters?
9. What effects did the project have, or will have, on the community, chapter members, BAP, etc.? (max 80 words)
10. Is this a multi-year project?
11. If YES, please provide a summary of enhancements and statistical description of improvements from previous two years (max 80 words)
12. Is there any copyrighted material used in the presentation?
13. If YES, please provide a description of any copyrighted material used in the presentation (max 75 words)

# Appendix B

## Presentation Guidelines

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

**Required Content**—Criteria considered by judges include, but are not limited to, the following:

- Overview of chapter involvement.
- Focus on one idea/project fitting under the selected Best Practices category.
- Informative beginning (introduction of presenters and topic).
- Presentation must address relevant points discussed in the corresponding online form.
- The presentation must include evidence of the success of your project when appropriate.
- At a minimum, the project must be something the submitting chapter is doing in the current year (i.e., not just a great idea, but something the chapter is actually doing).
- Feasibility to be replicated by other chapters.
- Quality of presentation, with appropriate use of technology within guidelines.
- Presentation skills of presenters such as eye contact, void of reading notes, transitions, ability to answer judges' questions.

## General Guidelines

- Chapters must submit the online form by the deadline without exception.
- BAP student teams should present their Best Practice for no more than 8 minutes.
- All BAP Best Practices presentation team members must have a speaking role during presentation.
- Best Practices being presented must be 50% complete by the time of the competition. If not able to be quantified, the percentage deemed to be completed will be determined at the discretion of the judges.
- All firm/corporate/professional copyrighted logos must not be included in presentations without proper approval.
- All chapters must use the official BAP logo or will be disqualified from placing in the competition. Please visit <https://www.bap.org/branding-and-style-guidelines> for the logo.
- Handouts are **not** permitted.
- Teams presenting on the same topic as in the previous year must clearly articulate the enhancements and statistical description between first and second years.

### Q&A Session

- There will be 2 minutes of Q&A with the judges for each live presentation at the Mid-Year meeting.
- As a general best practice, chapters should consider what questions may be asked and incorporate that content into their presentation.

### Evaluation & Feedback

- Chapters will be evaluated on content delivered during formal presentation only. Any conversation following the formal presentation will not be considered during the evaluation process.
- Judges decisions are final and non-negotiable.

### Technology

- The presentation may include various forms of AV aids (audio, video, poster board, props, PowerPoint, etc.) to help communicate your project to the audience.
- PowerPoint presentations are limited to slides and photos only. Added audio or video must be limited to 60 seconds total — not one minute for each clip.