



New Faculty Advisor & Refresher Workshop

Cassy Henderson, Southwest Region Chapter Advocate
Mark Judd, Western & Northwest Region Chapter Advocate

Beta Alpha Psi Annual Meeting
Thursday, July 28, 2022
Orlando, FL

Possible Unfamiliar Terms



ROA

Policies

EO

BOY

ES

PCA

CA

FA

EOY

Where to find answers to your questions




www.bap.org

Resources Pages for Faculty Advisors



← → ↻ bap.org/chapter-resources 🏠 ☆ 🌐 ⚙️

🔍 Association of Inter... Gmail - Email from... Analytics - Organiza... Wells Fargo Comm... Clodify Projects - Clodify Teams - Clodify Greater Good: The... Contact Reporting Intranet

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

[ABOUT](#) [BENEFITS](#) [IMPACT](#) [RECOGNITION](#) [NEWS & CALENDARS](#) [RESOURCES](#) [JOIN](#)

<p>CHAPTER RESOURCES</p> <p><i>Includes materials to manage your BAP chapter effectively!</i></p> <p>Chapter Resources</p>	<p>FACULTY ADVISORS RESOURCES</p> <p><i>Includes materials for all faculty advisors (existing and new) to maintain a strong and effective chapter.</i></p> <p>Faculty Advisor Resources</p>	<p>REPORTING INTRANET RESOURCES</p> <p><i>Includes training and FAQ materials on all aspects of Chapter Reporting.</i></p> <p>Reporting Intranet Resources</p>
<p>BOARD OF DIRECTORS RESOURCES</p> <p><i>Includes materials for all current International BAP Board of Directors.</i></p> <p>Board of Directors Resources</p>	<p>CHAPTER ADVOCATE RESOURCES</p> <p><i>Includes materials for all current Chapter Advocates.</i></p> <p>Chapter Advocate Resources</p>	<p>PROFESSIONAL PARTNER RESOURCES</p> <p><i>Includes materials for all Professional Partners.</i></p> <p>Professional Partner Resources</p>

Faculty Advisor Resource List



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

Contact: Reporting Intranet

[ABOUT](#) [BENEFITS](#) [IMPACT](#) [RECOGNITION](#) [NEWS & CALENDARS](#) [RESOURCES](#) [JOIN](#)

Faculty Advisors Resources

- [Faculty Advisor Manual \(PDF\)](#)
- [New Faculty Advisor Information \(2019 Annual Meeting session\)](#)
 - [Faculty Advisor Toolkit \(PDF\)](#)
- [Chapter Fees](#)
- [2021 - 2022 Financial Reporting Reminders \(PDF\)](#)
- [2022 Program for Chapter Activities \(PCA\)](#)
 - [PCA At-A-Glance \(PDF\)](#)
- [Ideas for Online Service Activities](#)
 - [Fall 2021 Suggestions](#)
- [Reasons to Join Beta Alpha Psi Recruitment Flyer](#)
- [Fall Virtual Recruitment Event \(September 2021\)](#)

Faculty Advisor Manual

- Understanding Your Role
- Tips for a Successful Chapter
- Chapter Resources Page
- Reporting Intranet
- Program for Chapter Activities (PCA)
- Practice Internal Controls

Understanding your role as Faculty Advisor



- Make a commitment.
 - ...being available to your chapter.
 - ...attending and supporting chapter activities.
 - ...traveling to mid-year and annual meetings.
 - ...becoming familiar with the: Program of Chapter Activities (PCA), Policies and Procedures Manual, BAP Constitution and Bylaws
 - ...providing continuous encouragement
- Provide counsel and assistance to your chapter
- Mentor/develop student leaders
- Serve as liaison:
 - ...between chapter and the BAP Executive Office.
 - ...between chapter and administrative units of your university.

Understanding your role as Faculty Advisor

Promote your chapter:

- ...in accounting, finance, data analytics and technology principles courses
- ...on your university/college website.
- ...to academic advisors during orientation or advising and on Canvas, Blackboard, etc.
- ...social media such as the university or business school page(s).
- ...on the walls of your classroom or business building.

Understanding your role as Faculty Advisor

Ways to contact potential candidates:

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

Tips for a Successful Chapter

- Active FA and Officers are key
- Focus is on the students
- Maintain ethics, integrity, & consistency
- Support from faculty, dean, professionals and alumni
- Provide meaningful programs
- 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!

Tips for a Successful Chapter

Motivating Officers:

- Expect a lot – your officers will generally want to please you!
- Recruit and train great leaders
- 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!
- Strive to keep officers motivated.
- Communicate constantly and recognize their contributions and accomplishments.

Resources Pages for Faculty Advisors



The screenshot shows the BAP website at bap.org/chapter-resources. The page features a navigation menu with links for ABOUT, BENEFITS, IMPACT, RECOGNITION, NEWS & CALENDARS, RESOURCES, and JOIN. The main content area is divided into three columns of resource categories:

- CHAPTER RESOURCES** (highlighted with a red circle): Includes materials to manage your BAP chapter effectively. Chapter Resources.
- FACULTY ADVISORS RESOURCES**: Includes materials for all faculty advisors (existing and new) to maintain a strong and effective chapter. Faculty Advisor Resources.
- REPORTING INTRANET RESOURCES**: Includes training and FAQ materials on all aspects of Chapter Reporting. Reporting Intranet Resources.

Other categories include:

- BOARD OF DIRECTORS RESOURCES**: Includes materials for all current International BAP Board of Directors. Board of Directors Resources.
- CHAPTER ADVOCATE RESOURCES**: Includes materials for all current Chapter Advocates. Chapter Advocate Resources.
- PROFESSIONAL PARTNER RESOURCES**: Includes materials for all Professional Partners. Professional Partner Resources.

Chapter Resources Page



Chapter Fees:

- Annual Chapter Maintenance Fee: \$300 (**does not** apply to petitioning chapters)
- One-Time International Candidacy Fee: \$75 (**does** apply to petitioning chapters)
- Late Payment Fee per candidate after 60 days: \$20
- Candidate dues are nonrefundable.
- Credit card payment is accepted for dues and the chapter maintenance fee.

Chapter Resources Page



Certificates:

- How do you order?
 - Enter candidate records
 - Pay the \$75 fee
 - Move records to the Submit for Initiation folder
- Certificates will be sent from Award Concepts within 2 weeks.
- If you need them sooner, email bap@bap.org. \$50 fee for rush delivery payable only by check.
- Replacement Certificate Fee: \$15
- Certificate Fee for Honorary Initiate (already a member of another chapter): \$15
- Please allow up to two weeks for delivery of certificates. If you need them sooner, contact bap@bap.org.
- Rush fee for certificates is \$50 payable by check only.

Reporting Intranet

- Member login information
- Candidate and member information
- Professional, service, essential skills and reaching out activities
- Chapter EIN may be found here too
- Beginning, Mid-Year, and End of Year Reports

Reporting Intranet

Reporting Deadlines to Remember:

- **Beginning of the Year Report (BOY)**
 - October 15th for U.S.
 - June 15th for Oceania
- **Mid-Year Report** (Award Seeking and Petitioning Chapters only)
 - December 15th for U.S.
 - August 15th for Oceania
- **End of Year Report (EOY)**
 - June 1st for U.S.
 - December 15th for Oceania
- US Chapters- Reporting Year is June 1st through May 31st.
- Oceania Chapters – Reporting Year is January 1 through December 31st.
- BAP Financial Fiscal Year is May 1st thru April 30th
- End-of-Year Late Reporting Fee (for failure to submit by June 1 for U.S. & December 15 for Oceania: applies to tax filing 990-N e-Postcard and/or Faculty Advisor Sign-off): \$100

Program for Chapter Activities

“THE RULE BOOK” - PROGRAM FOR CHAPTER ACTIVITIES (PCA)

- The planning guide for chapter’s programs and activities
- Chapter Achievement levels and activity minimums
 - Professional Activities
 - Essential Skill professional activity options are detailed here
 - Reaching Out Activities
 - Service Activities
- Reporting deadlines and requirements for beginning of the year, mid-year and end of year reports
- Initiation reporting

Chapter Supplies & Logos



- Honor cords and stoles
- BAP Brochures
- BAP logo branding and style guidelines
- Officer transition resource

Policy & Procedures Manual

Detailed explanations of membership eligibility and duties of officers

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.
 - Checks – two signatures
 - Receipts should be kept for all disbursements.
- Bank reconciliations - prepared monthly, reviewed, and approved by either the faculty advisor or a chapter officer other than the treasurer.
- Maintain all records for 3 years or longer if your school requires

Other Helpful Links & Resources



- Bios and contact information on the Board of Directors, Professional Partners, BAP Staff and Chapter Advocates (can find your regions)
- BAP Constitution and Bylaws (Articles III & IV on Candidate Status and Member Eligibility)
- Monthly Newsletter from BAP
- Fellow BAP Faculty Advisors
- Executive Office:
 - Margaret Fiorentino, Executive Director
 - Lisa Wicker, Manager - Chapter Services
 - Katherine Hackett, Shared Resource

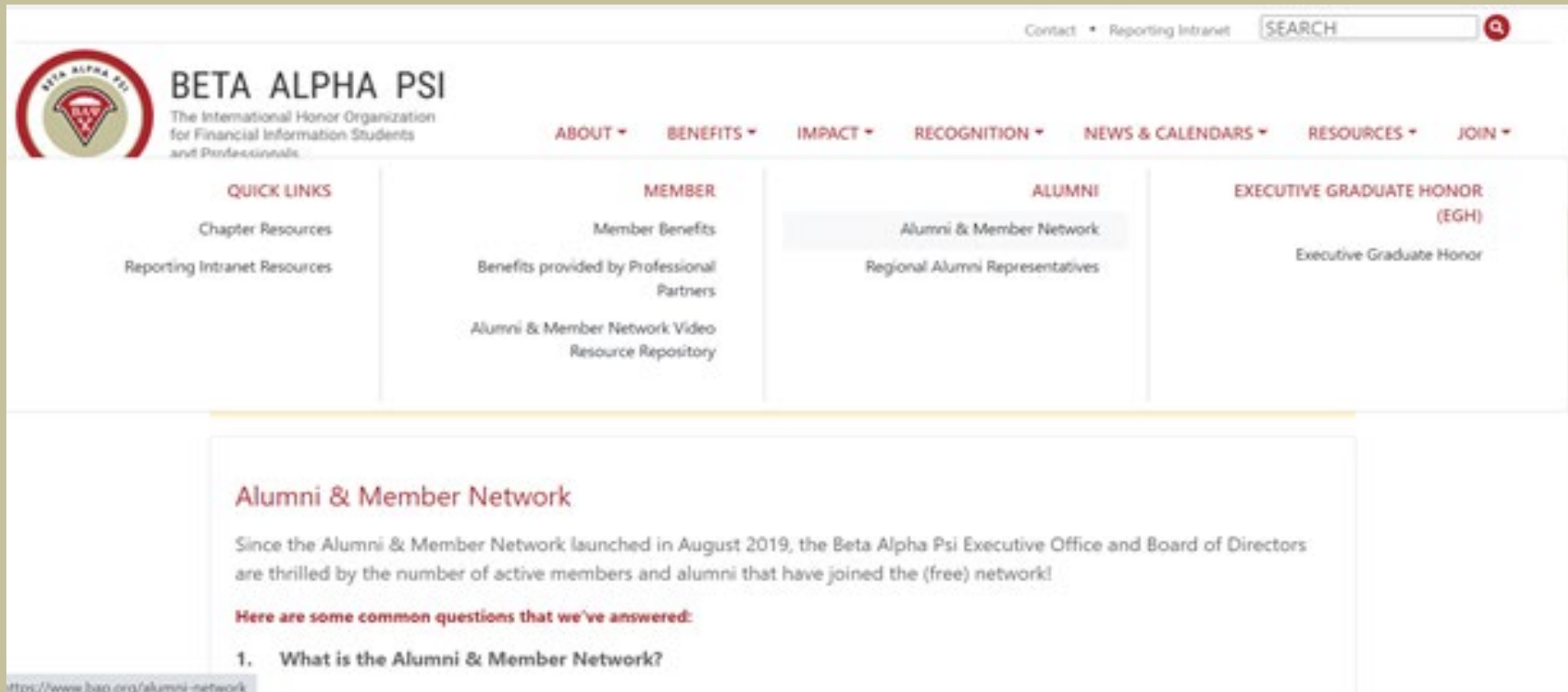
BAP Homepage: Join



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



BAP Alumni & Member Network



The screenshot shows the Beta Alpha Psi website. At the top right, there are links for "Contact" and "Reporting Intranet", and a search bar with the text "SEARCH". The main header features the Beta Alpha Psi logo and the text "BETA ALPHA PSI The International Honor Organization for Financial Information Students and Professionals". Below the header is a navigation menu with links for "ABOUT", "BENEFITS", "IMPACT", "RECOGNITION", "NEWS & CALENDARS", "RESOURCES", and "JOIN". The main content area is divided into four columns: "QUICK LINKS" (Chapter Resources, Reporting Intranet Resources), "MEMBER" (Member Benefits, Benefits provided by Professional Partners, Alumni & Member Network Video Resource Repository), "ALUMNI" (Alumni & Member Network, Regional Alumni Representatives), and "EXECUTIVE GRADUATE HONOR (EGH)" (Executive Graduate Honor). Below this is a section titled "Alumni & Member Network" with a paragraph stating: "Since the Alumni & Member Network launched in August 2019, the Beta Alpha Psi Executive Office and Board of Directors are thrilled by the number of active members and alumni that have joined the (free) network!". Below this paragraph is a heading "Here are some common questions that we've answered:" followed by a list item "1. What is the Alumni & Member Network?". At the bottom left of the screenshot, the URL "https://www.bap.org/alumni-network" is visible.

- Encourage members and alumni to join.
- Faculty advisors may join if you have been initiated at your chapter.

Chapter Advocates

ATLANTIC COAST REGION

- Sandra Cereola, St. Anselm College

SOUTHWEST REGION

- Cassy Henderson, Sam Houston State University

NORTHWEST and WESTERN

- Mark Judd, University of San Diego

SOUTHEAST REGION

- Lisa Owens-Jackson, North Carolina A&T State University

MIDWEST REGION

- Jason Stanfield, Ball State University

ROCKY MOUNTAIN and MISSOURI VALLEY

- Rita Grant, Grand Valley State University and former BAP President

OCEANIA REGION

- Fred Ng, The University of Auckland

Chapter Advocates: Incoming



SOUTHWEST REGION

Connie McKnight
University of Central
Arkansas



ATLANTIC COAST REGION

Avneet Nagra
St. John's University



2022 Annual Meeting Sessions

Annual Meeting: Concurrent Sessions



Please attend the following:

- Faculty Advisor Exchange with Board, CAs, and Professional Partners
 - Friday 7:00 am – 7:45 am
- Program of Chapter Activities and Reporting Intranet
 - Friday 2:00 pm – 2:15 pm,
 - Saturday 9:45 am – 11:00 am
- Host Chapter Session, 5 Mid-Year Meetings for 2023
 - Saturday 11:15 am – 12:30 pm

- **2023 Mid-Year Meeting Schedule – US**
- **All meetings start on Friday at 1:00 and end on Saturday at 1:30**



February 10-11, 2023
Houston, TX – The Whitehall

February 17-18, 2023
Seattle, WA – Renaissance Seattle

February 24-25, 2023
Charlotte, NC – The Sheraton & Le Meridien Charlotte Hotel Complex

March 3-4, 2023
Pittsburgh, PA – Sheraton Pittsburgh Hotel at Station Square

March 17 – 18, 2023
Milwaukee, WI – Hilton Milwaukee City Center

Possible Unfamiliar Terms Now?

ROA

Policies

EO

BOY

ES

PCA

CA

FA

EOY



New Faculty Advisor & Refresher Workshop

Thank you! Any questions?

Beta Alpha Psi Annual Meeting
Thursday, July 28, 2022
Orlando, FL