



**Beta Alpha Psi**  
**Officer Transition Document**

## **Officer tasks and responsibilities**

We are aware that not every chapter has each of these roles. Please take the tasks and divide amongst officers as your chapter sees fit. Please make this a collaborative process with your faculty advisor. If you have any questions, please email us at [bap@bap.org](mailto:bap@bap.org)

### **President tasks**

- Run weekly meetings
- Create agenda for officer meetings
- Create sense of community for members
- Get to know each officer 1:1
- Finalize speakers each quarter/semester
- Read and stay up to date on emails and posts from the Executive Office (share information as applicable)

### **Finance tasks**

- Invoice firms (as needed)
- Deposits (from companies and Executive Office) on a timely basis
- Process member payments within 60 days of records being entered into the Reporting Intranet
- Process any payments for chapter. Chapter maintenance fee is due on October 15.
- Oversee QuickBooks or other accounting software chapter is using
- Find additional funding for chapter (as needed)
- U.S. chapters: Prepare 990n e-postcard or Over \$50K spreadsheet in May and send confirmation to [bap@bap.org](mailto:bap@bap.org)
- Oceania chapters: review and meet any local tax requirements (based on country and chapter)

### **Reporting tasks**

- Input information into the Executive Office Reporting Intranet, review Reporting Intranet Guide [here](#)
- Take attendance at weekly meetings (or ensure attendance is being taken)
- Maintain accurate individual and chapter wide community service and professional participation hours for entire chapter
- Answer questions about types of activities that qualify for professional/community service hours
- Ensure chapter compliance with the Executive Office Program for Chapter Activities (PCA) [here](#)
- U.S. chapters: Beginning of Year report due October 15, Mid-Year report due December 15, End of Year report due June 1
- Oceania chapters: Beginning of Year report due June 15, Mid-Year report due Aug 15, End of Year report due December 15
- Maintain current candidate and membership rosters

### **Membership tasks**

- Communicate and build relationships with members (new and existing)
- Field questions from new candidates
- Host event for new candidates
- Keep track of hours for new candidates and share with Reporting officer
- Be the main point of contact for new candidates
- Send email to new candidates letting them know how many hours they need to be initiated/how they may obtain those hours

### **Public Relations/Social Media/Webmaster tasks**

- Send emails to chapter (if applicable)
- Update website and social media regularly (maintain BAP Executive Office branding) (email [lpeck@bap.org](mailto:lpeck@bap.org) with questions)
- Brainstorm and implement social events (with meeting planner, if applicable)

### **Meeting Programming tasks**

- Connect the chapter together (through weekly meetings, community service and outside events and activities)
- Plan events in advance (food, logistics, etc.)
- Send thank you cards to firms after meetings (after they speak or sponsor)
- Brainstorm and implement new events for your chapter to engage members who may not feel included
- Host 'Meet the Firms' event, maintain relationship with recruiters and professional partner organizations

### **Competition tasks**

- Review upcoming deadlines and competition guidelines and plan accordingly
- Oversee Best Practices
- Prepare abstracts and review presentations
- Gold chapter video (if applicable)

### **Community Service tasks**

- Coordinate community service events and work with Public Relations/Social Media officer to share information to chapter
- Serve as the primary contact for community service liaisons
- Communicate with chapter frequently to ensure everyone has enough service opportunities to fulfill the hours requirement
- Report service hours to Reporting officer