



New Faculty Advisor & Refresher Workshop

Eddie Nabors, Southeast Region Chapter Advocate

Marci Butterfield, Rocky Mountain/Missouri Valley Region Chapter Advocate

Beta Alpha Psi Annual Meeting

Thursday, August 8, 2019

Chicago, IL

Possible Unfamiliar Terms

ROA

Policies

EO

BOY

ES

PCA

CA

FA

EOY



Understanding your role as Faculty Advisor

Understanding Your Role

- 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.
- Contact all potential candidates as soon as they become eligible.
- Make a commitment. Promote your chapter.

Understanding Your Role:

Make a commitment by

- ...being available to your chapter.
- ...attending and supporting chapter activities.
- ...traveling to regional and annual meetings.
- ...voting at chapter meetings.
- ...becoming familiar with the:
 - Program of Chapter Activities (PCA)
 - Policies and Procedures Manual
 - BAP Constitution and Bylaws
- ...providing continuous encouragement

Understanding Your Role:

Promote your chapter

- ...in accounting principles courses.
- ...in the first majors course for students in accounting, finance and information systems.
- ...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.

Understanding Your Role:

How to contact potential candidates...

- ...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.
- ...build a relationship.



Tips for a Successful Chapter

Tips for a Successful Chapter

- Have an actively involved FA and Officers!
- Remind yourself that it's not about you, but about the students
- Maintain ethics & integrity in all you do
- Maintain consistency
- Seek support from faculty, dean, professionals and alumni
- Recruit and train great leaders
- Provide meaningful programs at meetings
- Strive to keep officers motivated. Communicate constantly and recognize their contributions and accomplishments.
- 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!
- 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!



Where to Find Answers

Where to Find Answers

www.bap.org

Your source for
(almost) all FA-related
information.



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SEARCH

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Chapters Page

[About](#) [Join](#) [Competitions](#) [Member Benefits](#) [News](#) [Events](#) [Donate](#) [Contact](#)

For Our Chapters and Faculty Advisors

As candidates, members and faculty advisors of Beta Alpha Psi you all serve an integral part in making sure the organization functions effectively. On this page you will find all the resources needed to be successful.

Resources

- BAP Power/Vote Template
- Member Recruitment Video
- New Essential Skill - Accounting Feedback
- Essential Skills (PDF)
- How do I know my chapter active? (PDF)
- BAP Social Media Policy (PDF)
- New! BAP Officer Transition Document (PDF)

Deadlines

- Find a list of all upcoming deadlines here.

Digital Badge

- For more information, click here.

Reporting Intranet Resources

- Reporting Intranet Guide (PDF)
- Reporting Intranet FAQs (PDF)
- Council FAQs (PDF)
- 5 Quick Reporting Intranet Tips
- Membership Certificates Alert
- PCA At-A-Glance (PDF)
- August 2018 PCA Presentation (PDF)
- Mid-Year Reporting Guide (PDF) and Webinar Recording
- End of Year Reporting Guide (PDF) and Webinar Recording
- IES Form 990-N (e-Postcard) User Guide
 - What we will need from your chapter for the 990n tax filing (Please send to bap@bap.org)
 - 990-N Submission (PDF)
 - 990-N Confirmation (PDF)
- IES Form 990-N (e-Postcard) Filing
- Tutorials

Chapter Forms

- FY 2019-2020 Maintenance Fee Invoice (PDF)
- Credit Card Authorization Form (PDF) - For School Administrators who do not have access to the Reporting Intranet

Chapter Supplies

- BAP Brochure (PDF)
- Name Badge Template (Compatible with Avery 5392)
- Replacement Certificates Form (PDF)
- Award Certificates Form (PDF)
- Order Jewelry, Table Covers, and BAP Branded Items Here
- Honor Coats order form
- Honor Stoles order form
- Honor Stoles order form - 100th anniversary edition!

For BAP brochures and chapter banners, contact the Executive Office

Faculty Advisor Resources

- Faculty Advisor Manual (PDF)
- New Faculty Advisor Information (2018 Annual Meeting session)
- 2018 Regional Meeting Host Chapter Manual

PROFESSIONAL PARTNER STUDENT BENEFITS

As a member of Beta Alpha Psi you are entitled to certain benefits. Click here to see all our Professional Partners have to offer!

CHAPTER RESOURCES

- Initiators and Electors
- Active Chapters
- Chapter Fees
- Reporting Intranet
- Insurance Rider

CHAPTER HANDBOOK

- Program for Chapter Activities
- Financial Reporting Guide
- Constitution & Bylaws
- Policy and Procedures Manual
- Code of Ethics

ANNUAL REPORT

Check out our 2018 annual report.

THE 2018 WINNERS

Who stood out and took home the gold (not to mention the prize money)?

Check out the 2018 winners.



Chapters Page: Closer Look

For Our Chapters and Faculty Advisors

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- [Member Recruitment Video](#)
- [New Essential Skill - Accepting Feedback](#)
- [Essential Skills \(PDF\)](#)
- [How do I keep my chapter active? \(PDF\)](#)
- [BAP Social Media Policy \(PDF\)](#)
- New! [BAP Officer Transition Document \(PDF\)](#)

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Digital Badge

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Chapters Page: Closer Look

Reporting Intranet Resources

- [Reporting Intranet Guide \(PDF\)](#)
- [Reporting Intranet FAQs \(PDF\)](#)
- [Oceania FAQs \(PDF\)](#)
- [5 Quick Reporting Intranet Tips](#)
- [Membership Certificates Alert](#)
- [PCA At-A-Glance \(PDF\)](#)
- [August 2018 PCA Presentation \(PDF\)](#)
- [Mid Year Reporting Guide \(PDF\)](#) and [Webinar Recording](#)
- [End of Year Reporting Guide \(PDF\)](#) and [Webinar Recording](#)
- [IRS Form 990-N \(e-Postcard\) User Guide](#)
 - **What we will need from your chapter for the 990n tax filing (Please send to bap@bap.org):**
 - [990-N Submission \(PDF\)](#)
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Chapters Page: Closer Look

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Chapters Page: Closer Look

Faculty Advisor Resources

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- [New Faculty Advisor Information \(2018 Annual Meeting session\)](#)
- [2019 Regional Meeting Host Chapter Manual](#)

Chapters Page

CHAPTER RESOURCES

[Initiations and Elections](#)

[Active Chapters](#)



[Chapter Fees](#)

[Reporting Intranet](#)

[Insurance Rider](#)

Chapters 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
- Replacement Certificate Fee: \$15
- Certificate Fee for Honorary Initiate (already a member of another chapter): \$15
- 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
- All membership fees are nonrefundable.
- Credit card payment is accepted for dues and the chapter maintenance fee.
- 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.

Chapters Page

CHAPTER RESOURCES

[Initiations and Elections](#)

[Active Chapters](#)

[Chapter Fees](#)



[Reporting Intranet](#)

[Insurance Rider](#)

Chapters Page: Reporting Intranet

- Candidate and member information is reported here as well as the chapter's professional, service, essential skills and reaching out activities. Chapter EIN may be found here too.
- 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

Chapters Page: Reporting Intranet Deadlines

- **Beginning of the Year Report (BOY):**
 - Plan of activities
 - October 15th for U.S., June 15th for Oceania
- **Mid-Year Report (Award Seeking Chapters and Petitioning Chapters only):**
 - Report on activities
 - December 15th for U.S., August 15th for Oceania
- **End of Year Report (EOY):**
 - Report on activities and financials
 - June 1st for U.S., December 15th for Oceania
- **Note: Chapter Reporting Year is June 1st through May 31st for U.S.**
Chapter Reporting Year is January 1 through December 31 for Oceania
 - Financial Fiscal Year is May 1st through April 30th

Chapters Page:

Reporting Intranet – Faculty Advisors

- Create and manage officer login accounts
- Review all chapter reports:
 - Beginning of Year – October 15th for U.S., June 15th for Oceania
 - Mid-Year Report – December 15th for U.S., August 15th for Oceania (award-seeking and petitioning chapters)
- Complete Student Hours Verification Report
- Sign-Off on End-of-Year Report by June 1st for U.S., December 15th for Oceania
 - Enter 990-N Submission ID or upload Over \$50K spreadsheet
- Meet with Chapter Reporter at least once each semester to review chapter reporting
- Meet with Chapter Treasurer to ensure that all membership dues and chapter maintenance fee have been paid on time

Chapters Page:

Reporting Intranet – Chapter Officers

- Perform all chapter reporting
- Enter new candidates into the system
- Prepare Beginning-of-Year Report
- Enter professional and service activities, Reaching Out activities and initiations. The members and candidates rolls should be current before professional and service activities are entered
- Prepare Mid-Year reports (award-seeking chapters)
- Prepare End-of-Year Report
- Submit 990-N e-Postcard or upload Over \$50K spreadsheet by June 1st
- Work with faculty advisor to process all payments for membership dues and chapter maintenance fees

Chapters Page

CHAPTER HANDBOOK



Program for Chapter Activities

Financial Reporting Guide

Constitution & Bylaws

Policy and Procedures Manual

Code of Ethics

Chapters Page:

Chapter Handbook

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

- The planning guide for chapter’s programs and activities
- Chapter Achievement Levels and minimum activities and activity hours (including non-BAP hours) to reach desired achievement levels
- Candidates – When to enter into the reporting intranet
- Reporting deadlines and requirements for beginning of the year, mid-year and end of year reports
- Initiation – How to report and how to handle candidate to member reclassification in reporting intranet
- PROGRAM FOR CHAPTER ACTIVITIES (PCA)
 - Exhibits with specific activities that qualify as:
 - Professional (Exhibit A)
 - Essential Skill professional activity options are detailed here
 - Reaching Out Activities (Exhibit B)
 - Service Activities (Exhibit C)

Chapters Page: Chapter Handbook

- The “Rule Book”
- PCA At-A-Glance
- PDF on the left side under the Chapters link

PROGRAM FOR CHAPTER ACTIVITIES AT-A-GLANCE

CHAPTER REQUIREMENTS

Chapters must meet certain requirements depending upon the desired achievement level. The requirements include submission of reports, initiation, Reaching Out activities, professional activities and service activities. Chapters not meeting the mission based requirements will be 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 <small>*Award seeking chapters must include at least 1 mandatory "Essential Skills" session.</small>	Service Activities
Mission Based	Yes	N/A	Yes	Yes	3	6	1
Distinguished	Yes	Yes	Yes	Yes	5	*6	1
Superior	Yes	Yes	Yes	Yes	8	*6	1

To qualify as a professional or service activity, the event must be at least 50 minutes in length and at least 25% of the chapter's active members/candidates for the month must participate in the event.

ACTIVITY HOURS REQUIRED FOR AWARD SEEKING CHAPTERS

To qualify as a superior or distinguished chapter, there are also individual member/ candidate professional and service hour requirements. These requirements are designed to encourage involvement of Beta Alpha Psi members and candidates in professional and community service activities, not only as a chapter but also individually

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)
Distinguished	8	8	20
Superior	12	12	32

Chapters Page

CHAPTER HANDBOOK

Program for Chapter Activities



Financial Reporting Guide

Constitution & Bylaws

Policy and Procedures Manual

Code of Ethics

Chapters Page:

Chapter Handbook

Financial Reporting Guide

- Treasurer reporting responsibilities:
- Preparing EOY financial statements:
 - Statement of Financial Position
 - Statement of Activities
- Filing Form 990
 - Form990-N (e-Postcard) if average annual gross receipts < \$50,000.
 - Form is filled out on IRS website and a one-time registration form must be completed.
 - Form cannot be filed until after April 30th.
 - Chapter must use its unique EIN, not the BAP EIN.
 - Find EIN on Reporting Intranet, Reporting & Membership, View/Update Chapter Profile

Chapters Page:

Chapter Handbook

Filing Form 990 (continued)

- FA must complete sign-off section in reporting intranet and a screen shot of the 990-N confirmation must be sent to Lisa Wicker lwicker@bap.org.
- If average annual gross receipts are > \$50,000, **over \$50K spreadsheet** must also be uploaded and FA must complete sign-off section in reporting intranet.
- If average annual gross receipts are > \$100,000 spreadsheet and an **auditor's report** must also be uploaded in addition to other requirements.

Chapters Page

CHAPTER HANDBOOK

Program for Chapter Activities

Financial Reporting Guide

Constitution & Bylaws



Policy and Procedures Manual

Code of Ethics

Chapters Page: Chapter Handbook

Policy & Procedures Manual

- Detailed explanations of membership eligibility and duties of officers



Policies & Internal Control

Notable Policies

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.
 - All checks should require a signature from two chapter officers or a chapter officer and faculty advisor regardless of amount.
 - Receipts should be kept for all disbursements.
 - When received, cash and checks should be counted by two officers, and if possible, deposited by two officers. All checks should be restrictively endorsed “for deposit only” immediately upon receipt.
- Bank reconciliations should be prepared monthly, reviewed, and approved by either the faculty advisor or a chapter officer other than the treasurer. This person should also verify two signatures are present on all checks if check images are included with the bank statement.
- Chapter officers or the faculty advisor should not approve anything they feel is questionable.



Other Helpful Links & Resources

BAP Homepage

www.bap.org



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BAP Homepage: About



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- 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:
 - Margie Fiorentino, Executive Director
 - Lisa Wicker, Manager - Chapter Services
 - Lauren Peck, Manager - Marketing

BAP Homepage: Join



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

Chapter Advocates

ATLANTIC COAST REGION

- Arthur Reed, Bentley University

SOUTHWEST REGION

- Kelly Noe, Stephen F. Austin State University

NORTHWEST and WESTERN

- Sarah Bee, Seattle University

SOUTHEAST REGION

- Eddie Nabors, University of Alabama at Birmingham

MIDWEST REGION

- Dori Danko, Grand Valley State University

ROCKY MOUNTAIN and MISSOURI VALLEY

- Marci Butterfield, University of Utah

OCEANIA REGION

- Julie Harrison, The University of Auckland

Chapter Advocates: Incoming

ATLANTIC COAST REGION

- Sandra Cereola, James Madison University

SOUTHWEST REGION

- Cassy Henderson, Sam Houston State University



2019 Annual Meeting Sessions

Annual Meeting: Concurrent Sessions

Please attend the following:

- Faculty Advisor Exchange with Board, CAs, and Professional Partners
 - Saturday from 6:45 am – 7:45 am, Salon Stevens A1
- Program of Chapter Activities and Reporting Intranet
 - Friday 2:00 pm – 2:15 pm, Salon Stevens A1
 - Saturday 11:15 am – 12:30 pm, Salon Stevens A1

Possible Unfamiliar Terms Now?

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Thank you! Any questions?

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