# Appendix H
# Pre-Site Visit Information

Complete this questionnaire and return it as an email attachment to your Chapter Advocate one week prior to the scheduled visit.

| | |
|---|---|
| Date of Site Visit: | |
| Petitioning Chapter Number: | |
| School Name: | |
| School Address: | |
| Faculty Advisor's Name: | |
| Faculty Advisor's Email: | |
| Faculty Advisor's Phone Number: | |

Information about Recognized-Candidates[1] and Candidates

1. What is the composition of the Accounting/Finance/Business Analytics or Digital Technology student body at the time of the site visit?

| Major | Undergraduate | Graduate |
|---|---|---|
| Accounting | | |
| Finance | | |
| Business Analytics or Digital Technology | | |
| Subtotal | | |
| Other majors/concentrations | | |
| Total business school enrollment | | |

2. Approximately how many (number or percentage) of the above students are eligible to become a BAP candidate at any given time? (Take the number reported as the undergraduate subtotal above and, with help from your undergraduate business program office, *estimate* the number of undergraduates who meet the minimum eligibility requirements (see the Program for Chapter Activities (PCA) for those requirements).

| Potential Undergraduate Recognized-Candidates | Number |
|---|---|
| Accounting | |
| Finance | |
| Business Analytics or Digital Technology | |

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[1] Recognized-candidate: prior to chapter installation, candidates who meet initiation requirements are referred as recognized-candidates.

3. Beta Alpha Psi Recognized-Candidateship and Candidates (the actual at the time of the site visit) are:

| Major | Undergraduate | | Graduate | |
|---|---|---|---|---|
| | Candidates | Recognized-candidates | Candidates | Recognized-candidates |
| Accounting | | | | |
| Finance | | | | |
| Business Analytics or Digital Technology | | | | |
| Total | | | | |

4. Are the totals above representative of the average number of candidates/ recognized-candidates throughout the year?  ☐ Yes or ☐ No.

If no, provide the normal average number of candidates/recognized-candidates throughout the year.

| Candidates | |
|---|---|
| Recognized-candidates | |

5. In which month are officers elected and what is the length of their tenure?

| Month | |
|---|---|
| Tenure | |

Information about Chapter Activities

6. How many recordable events (see the PCA for the minimum requirements to record an event) has the chapter held this academic year as of the date of the site visit?

| Events (Baseline) | Conducted | Reported |
|---|---|---|
| BOY report (1) | | |
| Professional meetings (6) | | |
| Reaching Out Activities (3) | | |
| Service events (1) | | |
| Initiations (1) | | |
| EOY report (1) | | |

7. For each professional meeting in question 6, list the number of candidates, recognized-candidates, faculty, and others in attendance.

| Meeting | Candidates | Recognized-candidates | Total | Faculty | Other |
|---|---|---|---|---|---|
| 1 | | | | | |
| 2 | | | | | |
| 3 | | | | | |
| 4 | | | | | |
| 5 | | | | | |
| 6 | | | | | |
| 7 | | | | | |
| 8 | | | | | |

8. For each professional meeting, identify which entity(ies) presented the substance of the program. List the individual's or organization's name.

| Meeting | Student/Organization Presenting Substance of Meeting |
|---|---|
| 1 | |
| 2 | |
| 3 | |
| 4 | |
| 5 | |
| 6 | |
| 7 | |
| 8 | |

9. For each professional meeting, list the major topic presented.

| Meeting | Topic Presented |
|---|---|
| 1 | |
| 2 | |
| 3 | |
| 4 | |
| 5 | |
| 6 | |
| 7 | |
| 8 | |

10. Briefly describe each service event held.

| Date | Activity | Duration | Number Participating |
|---|---|---|---|
| 1 | | | |
| 2 | | | |
| 3 | | | |
| 4 | | | |
| 5 | | | |

11. Briefly describe each international-regional event in which the chapter participated /held.

| Date | Activity | Duration | Number Participating |
|---|---|---|---|
| 1 | | | |
| 2 | | | |
| 3 | | | |
| 4 | | | |
| 5 | | | |

<u>Other Information</u>

12. Other Student Organizations. List in column one other student organizations that exist on campus whose primary purpose is development of accounting, finance and/or information system students. In column B, estimate the approximate number of BAP recognized-candidates/candidates who also belong to these clubs.

| Other Student Organization | Estimated Number of BAP Candidates/Recognized-candidates |
|---|---|
| | |
| | |
| | |
| | |
| | |