



Best Practices Procedure Manual

Sponsored by Deloitte

Judges – Fall 2022

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“Innovation distinguishes between
a **leader** and a follower.”
- Steve Jobs

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 and increasing awareness of the accounting profession, skills-based volunteerism, and globalization. To date, there have been nearly 4,000 individual and team presentations at the Mid-Year and Annual meeting levels and over \$600,000 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 Friday, January 27, 2023 by 11:59PM ET (deadline) addressing the individual 2022-2023 Best Practices Topics. Chapters may submit 1 submission per category, but are not required to enter a submission for each category.
2. The top submissions for each category will be invited to present at the Mid-Year meeting your chapter is attending (Houston, Charlotte, Seattle, Pittsburgh, Milwaukee, or Melbourne, Australia).
3. The top 2 teams from each category at the mid-year meeting will be invited to advance to the 2023 Annual Meeting in Las Vegas, Nevada 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 mails monetary awards to the chapters.

At the Mid-Year competition, 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
				\$30,000

Timeline of Events

Spring (one year prior to Mid-Year Meeting)

- BAP President Elect proposes Best Practices topics.

August – January

- Professional Partners Chair and Chair Elect form judging teams for mid-year 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 Friday, January 27, 2023.**

February – May

- Once selected to present, chapters prepare their Best Practice presentations for the Mid-Year meeting.
- Live presentations for each category are a maximum of 8 minutes followed by 2 minutes of Q&A.
- 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 each Mid-Year meeting.
- Top 2 teams notify International Best Practices Coordinator of intention to compete at the Annual Meeting **no later than 3:00 p.m. CST on Friday, April 7, 2023.**
- International Best Practices Coordinator notifies the BAP Executive Office of all participants **no later than 3:00 p.m. CST on Friday, April 28, 2023.**
- Best Practices Coordinator begins preparing judging materials.

Key Dates

Friday, January 27, 2023, by 11:59PM ET Final Best Practices submissions due via BAP website

February – March

Attend one of the following mid-year meetings with your chapter:

- February 10-11, 2023: Houston, Texas
- February 17-18, 2023: Seattle Washington
- February 24-25, 2023: Charlotte, North Carolina
- March 3-4, 2023: Pittsburgh, Pennsylvania
- March 17-18, 2023: Milwaukee, Wisconsin
- April 12-14, 2023: Melbourne, Australia

Friday, April 7, 2023 by 3:00 p.m. CST

Top 2 teams notify International Best Practices Coordinator of intention to compete at the Annual Meeting

Friday, April 28, 2023 by 3:00 p.m. CST

International Best Practices Coordinator notifies the BAP Executive Office of all participants

Roles and Responsibilities

Professional Partner Chair & Chair Elect and Professional Partners Members

1. Form judging teams for Mid-Year Competitions
 - Timing: August–January
 - Detail: The Professional Partner Chair/Chair Elect forms judging teams for each Best Practices category, which is composed of Professional Partners members or Board of Directors attendees. The Professional Partners Chair/Chair Elect announces judging teams (names, email addresses, phone numbers, and employer) to the Chapter Advocate no later than 30 days prior to the Mid-Year competition.
 - Guidance:
 - ◆ If insufficient Professional Partners members are available, other Board of Directors members may judge after ensuring no affiliation or direct connection with any schools participating in the competition. Chapter Advocates must not participate at their own Mid-Year competition.
 - ◆ Judges will attend a mandatory 30-minute “Judging Expectations” training session as part of the mid-year meeting they are attending. This session will provide an overview of the competition, the role and responsibility of judges, and overall expectations for the competition.
2. Attend judge briefing, judge/evaluate presentations at Mid-Year competition, and decide winners
 - Timing: Associated with Mid-Year meeting dates
 - Detail: The Professional Partners Chair/Chair Elect meet with judging teams to explain the process and ensure the use of consistent judging standards. The Professional Partners Chair/Chair Elect will provide presentation guidelines and evaluation sheets before the judges review presentations.
 - Guidance: Judges will be asked to complete the action items outlined below.
 - ◆ Evaluate the presentation by using an evaluation worksheet provided by the Professional Partners Chair/Chair Elect.
 - ◆ Combine the abstract forms and presentation evaluations and rank the entire group of presentations. In evaluating the presentation, consider the following guidelines:
 1. To what degree were the category’s goals achieved?
 2. Judges evaluate the stated components and use the results of the evaluation criteria in their deliberations. The evaluation worksheet provided is not meant to be definitive.
 - ◆ As soon as possible after determining rankings, the judging team moderator must provide the Chapter Advocate with any documentation/checklists used to rank the Best Practices—unless the judging team member retains them.
 - ◆ Honorable Mentions will not be awarded.

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. This is an amazing opportunity to practice your presentation skills in front of Professional Partners (professionals from various disciplines).

The Competition

Presenting Chapters Must

1. Chapters invited to present at the Mid-Year meeting must prepare a presentation outlining their response to the Best Practices prompt.
2. Present the substance of their efforts or vision within 8 minutes followed by 2 minutes of Q&A. Reference Appendix B for guidelines.

Judging Guidelines

1. Judges will attend a mandatory 30-minute “Judging Expectations” training session approximately two weeks prior to the Mid-Year meeting they are attending.
2. Judging teams must record their individual observations about each presentation.
3. Judges will be provided with Annual Meeting evaluation form instructions:
 - Evaluation Form—A generic evaluation form will be provided as guidance. The criteria on this form convey the general goals of the Board of Directors for the Best Practices competition. However, it is not meant to be a definitive piece of work encompassing every aspect of the broad range of presentations and activities judged, nor does it provide omnipotent judgment as to the weighting of these factors. At best, any evaluation of this type of presentation is a subjective measure, which allows the individual judge some discretion in the applicability and weighting of the criteria to establish his/her competitive rankings.

Post Presentation Process

1. Judging teams, under the guidance of the Lead Judge, meet privately to evaluate all presentations.
2. After determining first, second, and third place winners, the Lead Judge informs the Best Practices Coordinator of the winners (Appendix D).
3. The Lead Judge is responsible for gathering the feedback and handing submitting via email to the BAP Executive Office representative by the deadline. The BAP Executive Office will scan and send feedback to the Chapters after the final mid-year meeting.
4. Judges will be required to provide written feedback to the first-place winning team after the award placement is communicated to all teams.
5. Judges should not share scoring sheets with any of the student teams.
6. The Coordinator must inform the BAP Executive Office and Deloitte Representative (Professional Partners, Board of Directors, or other chosen attendee) of all winners.
7. The BAP Executive Office, in conjunction with the Best Practices Coordinator, prepares the certificates and forwards the monetary awards to those chapters (funded by Deloitte).
 - Certificates must be provided to the Annual Conference Chairperson or his/her designee.
 - A listing of all winners and certificates will be given to the Deloitte Representative (Professional Partners, Board of Directors, or other chosen attendee) to announce the winners in each Best Practices category in accordance with the script for announcing the winners.
 - Winners for all regions to be announced during each Mid-Year meeting.

Annual Meeting Procedures

Eligibility to Compete

The top two Best Practices winners from each category at each of the six mid-year meeting are eligible to compete in the Best Practices competition at the Annual Meeting.

The Annual Meeting Chairperson designates a Best Practices Coordinator. The BAP Executive Office ensures the identity and contact information of the Coordinator is provided to all Chapter Advocates and Host Chapters. As soon as possible, after receiving a top placement award, winning chapters must notify the Best Practices Coordinator of their intention to attend and compete at the Annual meeting.

Planning for Judging the Presentations

The **Professional Partners Chairperson** must, approximately 30 days prior to the meeting:

1. Compile a list of Professional Partners members to judge Best Practices competitions, including one Deloitte Representative.
2. Form judging teams of at least three people for each Best Practices category.
3. Distribute Best Practices Procedures Manual to each judge. Presentation guidelines and evaluation sheets will be provided to judges by the Best Practices Coordinator before the competition begins.
4. Designate a judging team member as the Lead Judge. This person should have prior Best Practices judging experience and must not have judged the same Best Practices category at any previous Mid-Year meeting. Lead Judge responsibilities are discussed below.
5. Provide the BAP Executive Office, Best Practices Coordinator, and Annual Meeting Chairperson with the names, email addresses, and phone numbers of each judge. The BAP Executive Office must include the names and company affiliations of judges in its meeting program.

The **Best Practices Coordinator**, in conjunction with the Professional Partners Chair/Chair Elect, BAP Executive Office, and Annual Meeting Chairperson, must:

1. Prepare a digital packet for each judge that includes:
 - Best Practices Procedures Manual.
 - Goals and guidelines for each Best Practices category.
 - The abstracts from competing chapters.
 - The evaluation forms.
2. Distribute the packet to all judges with at least 2 weeks prior to the Annual Meeting to allow time for judges to review prior to on-site presentations.

The **Lead Judge** must:

1. Set time in advance of receiving the materials for the judging panel to review the process for the year
2. Set a time to convene the judging panel to force rank and determine the winning chapter
3. Meet with other judges informally, prior to the competition, to answer questions and confirm procedures and responsibilities are understood.
4. Report the competition results to the Best Practices Coordinator in accordance with the script for announcing winners (Appendix D).

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

Chapters will **not** receive feedback following the presentations at the Annual Meeting.

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 11:59 PM ET on Friday, January 27, 2023.**

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 the 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 you are attending (drop down option)
- Topic(s)

Questions

1. What are the primary goals of the project? (max 175 words)
2. What are the outcomes or expected outcomes if the project is yet to be completed at the time of submission? (max 150 words)
3. Number of members participating in project
4. Description of non-member participants and their roles (max 75 words)
5. Number of hours spent on project
6. What are the benefits to the chapter and others served by the project (i.e., lessons learned)? (max 80 words)
7. Is this project adaptable to other chapters?
8. What effects did the project have, or will have, on the community, chapter members, BAP, etc.? (max 80 words)
9. Is this a multi-year project?
10. If YES, please provide a summary of enhancements and statistical description of improvements from previous two years (max 80 words)
11. Is there any copyrighted material used in the presentation?
12. 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.
- 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 be disqualified from winning the Mid-Year meeting. Please visit <https://www.bap.org/branding-and-style-guidelines> for the logo.
- Handouts are **not** permitted. Teams may not provide additional hand out materials.
- 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 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.
- The decision of the judges is final.

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.

Appendix C

Presentation Evaluation Form

CATEGORY _____

DATE _____

JUDGE(S) _____

Judges should consider the following points when evaluating the content:

- Chapter involvement was demonstrated (number of participants and hours).
- Conclusions/outcomes/benefits were clearly stated.
- Time used was appropriate to the topic and within 5-8 minutes.
- Presentation matched the content of the abstract.
- Best Practice can be replicated by other chapters.

Fair	Good	Great
	/	X

Category/Criteria		Submitting School										
Overall Project Criteria	Relevant Background Information											
	Focus on one idea/project in current year											
	Feasibility to be replicated by other chapters											
Presentation Quality	Professional quality/ functionality of presentation											
	Public speaking skills/ ability to answer questions											
Topic Specific	INSERT KEY ATTRIBUTES FOR CATEGORY											
	INSERT KEY ATTRIBUTES FOR CATEGORY											

Submitting School – Force Ranking	1	2	3	4	5	6	7	8	9	10	Comments

Appendix D

Script for Announcing Winners

My name is [insert name here]. On behalf of Deloitte, thank you to each of the participants in this year’s Best Practices competition. We are grateful for your dedication to your chapters and communities.

Deloitte has been the proud sponsor of the Best Practices program at both the regional/mid-year and national levels since 2001. Their sponsorship of this program is intended to encourage students to develop and execute programs that promote awareness and student involvement in projects that exemplify values shared by Beta Alpha Psi and Deloitte. These values are captured and promoted through the topics announced each year revolving around ethics, corporate responsibility, diversity, increasing awareness of the accounting profession, skills-based volunteerism, and globalization.

To date, there have been nearly 4,000 individual and team presentations at the regional/mid-year and international levels and over \$600,000 awarded to Beta Alpha Psi chapters to support chapter operations, scholarships, and the continuation of best practices projects.

Each chapter had the opportunity to compete in the midyear meeting competitions, and the top 2 placing teams will be invited to compete in the Annual Meeting. To all the competitors, congratulations—you have all done a great job; thank you for all of your great ideas. Thank you as well to all the Professional Partners and any Board Members that judged these presentations. And now for the winners:

Category No. 1—[insert category title]

- **Third place goes to:**
- **Second place goes to:**
- **The first place winner is:**

Category No. 2— [insert category title]

- **Third place goes to:**
- **Second place goes to:**
- **The first place winner is:**

Category No. 3— [insert category title]

- **Third place goes to:**
- **Second place goes to:**
- **The first place winner is:**

Appendix E

Moderator/Lead Judge talking points

Note: Start promptly on time; any loading of presentations must be done in advance of the allocated time.

- Welcome everyone
- Introduce the judges
 - Have each judge stand and introduce themselves
- Review the Best Practice topic being presented in the room
 - Recommend reading the actual description of the topic
- Announce the order of the presentations
 - Recommend going in the order as listed in the program
- Review of the “Rules”
 - Each presenting team has up to 8 minutes. (The Lead Judge confirms that the timer is aware of this time limit and has the 5/3/1/stop signs.)
 - Allot two minutes for judges’ questions. Only judges can ask questions at this time—no one else.
 - Tell the teams where the timer will be seated and instruct them to keep an eye out for them and the signs.
 - Presentations should be preloaded onto the laptop being used.
- At the closing of the conference, the winning teams will be announced for first, second, and third place.
 - The top 2 teams advance to the Annual Meeting to compete.
 - The top 2 teams have the opportunity to meet with the judges at the conclusion of the conference to get written and verbal feedback/recommendations to consider for the national competition.
 - **No feedback is provided at the international competition.**
- If time permits at the end of the session, there will be an open Q&A session for anyone in the room to ask questions of the teams that presented.
- Please refrain from entering and leaving the room while teams are presenting. If you must exit, please wait until the time between presentations.
- Recording (video or audio) of the presentations is not permitted.
- Please put your phones on silent or vibrate.

Action Item: The Lead Judge should have a one-on-one conversation with the timer to request that he/she utilize the stopwatch feature on his/her cell phone to monitor the countdown of time starting at eight minutes and have the alarm feature indicate when the eight minutes is completed. In addition, the timer should restart the stopwatch feature to two minutes for the judges’ Q&A session.

Appendix F

Judges Feedback Form (Placing Teams)

To be completed by judge and distributed to first, second, and third place winning teams.

SUBMITTING SCHOOL

CATEGORY

PLACE	1st	2nd	3rd
--------------	------------	------------	------------

STRENGTHS

1.

2.

3.

OPPORTUNITIES FOR DEVELOPMENT

1.

2.

3.

Appendix G

Judges Feedback Form (Non-Placing Teams)

To be completed by judge and distributed only to non-winning teams in each category. Feedback is based on general themes and can be applied to all teams presenting in each category.

The Lead Judge is responsible for gathering the feedback and submitting electronic copies via email to the BAP Executive Office. The feedback form will be sent from the BAP Executive Office to the Chapter Advisor within a week of the Mid-Year Meeting competition to share with participating chapters.

SUBMITTING SCHOOL

CATEGORY

STRENGTHS

1.

2.

3.

OPPORTUNITIES FOR DEVELOPMENT

1.

2.

3.