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Best Practices Procedure Manual
Sponsored by Deloitte

Student - Winter 2019

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“Innovation distinguishes
between a **leader** and a
follower.”

- Steve Jobs

Program Summary

“Best Practices” are activities created and completed by a chapter to further specific goals identified by the board of directors of Beta Alpha Psi (the “Board of Directors”) and by Deloitte. These activities exemplify the spirit and purpose of Beta Alpha Psi (BAP) and, if applicable, allow other chapters to emulate those activities. Occasionally, the Board of Directors asks chapters for their vision regarding a future activity/issue/topic; such vision must be created by the chapter but cannot be completed nor emulated. Multiyear submissions are accepted; however, a strict emphasis on enhancements and statistical description of improvements are used to determine eligibility and overall competitiveness.

Deloitte has been the proud sponsor of the Best Practices program since 2001. The program encourages students 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 member 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 more than 2,600 individual and team presentations at the regional and national levels and nearly \$500,000 awarded to BAP chapters to support chapter operations, scholarships, and the continuation of Best Practices projects.

The Best Practices competition comprises a two-or three-step competitive process:

1. Chapters submit an abstract form, and the abstract form is approved.
2. Chapters deliver a presentation at their regional meeting (RM). Winning chapters (first, second, and third places) receive verbal recognition and a monetary award.
3. First place teams present at BAP’s annual meeting. Winning chapters at the annual meeting earn verbal recognition and additional monetary awards.

This document is organized by topic-and-timeline format for each responsible party (see “Roles and responsibilities”).

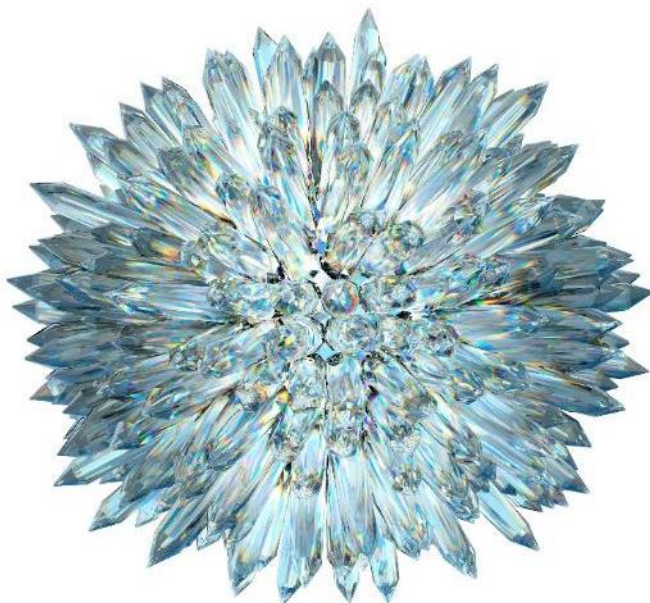


Awards

Deloitte funds all Best Practices competitions. The Board of Directors and Deloitte set award levels, which are nonnegotiable; the BAP Executive Office mails monetary awards to the chapters.

At each RM, 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 |
| RM (8) | \$500 | \$250 | \$125 | \$21,000 |
| Annual meeting (1) | \$1,500 | \$1,000 | \$500 | \$9,000 |
| | | | | \$30,000 |



Timeline of Events

Spring (one year prior to RM)

- BAP President Elect proposes Best Practices topics.

Fall (prior to RM)

- Professional Partners Chairperson designates Professional Partners Liaison.

August–January

- Professional Partners Liaison forms judging teams for RMs.
- Chapters determine topics to participate in, execute the project, and prepare abstract form.
- Chapters will view a virtual informational session to learn more about the Best Practices competition, timeline, and overall responsibilities.
- The Host Chapter designates Best Practices Coordinator.
- Chapters complete and submit the abstract form for Best Practices via the BAP.org site and Regional Meeting site **no later than 4:00 p.m. CST on Friday, January 25, 2019.**
- The BAP Executive Office will forward abstract forms to Deloitte **no later than 12:00 p.m. CST** on the following business day.
- Deloitte will confirm chapter eligibility with Chapter Advocate **no later than 3:00 p.m. CST on Thursday, January 31, 2019.**

February–April

- Deloitte will review the abstract forms and determine eligibility to participate.
- Chapter Advocate communicates eligibility to chapters **no later than 3:00 p.m. CST on Friday, February 1, 2019.**
- Chapters prepare their Best Practice presentations.
- The Host Chapter schedules presentations approximately one week prior to the RM.

February–April (including day of Best Practices competition (RM))

- The Professional Partner Co-Liaisons communicate judging expectations to Best Practices judges.
- Judges attend briefing to evaluate presentations and determine winners (rankings).
- The Host Chapter submits rankings to Chapter Advocate and prepares certificates.

May–August

- Chapters report winning team results to the BAP Executive Office approximately one week after the RM.
- First place winners notify National Best Practices Coordinator of intention to compete at the annual meeting **no later than 3:00 p.m. CST on Friday, April 26, 2019.**
- National Best Practices Coordinator notifies the BAP Executive Office of all participants **no later than 3:00 p.m. CST on Friday, May 10, 2019.**
- Best Practices Coordinator begins preparing judging materials.

Key Dates

| | |
|--|--|
| Friday, January 25, 2019 <i>No later than 4:00 p.m. CST</i> | Chapters complete and submit the abstract form for Best Practices via the BAP.org site and Regional Meeting site |
| Monday, January 28, 2019 <i>No later than 12:00 p.m. CST</i> | The BAP Executive Office will forward abstract forms to Deloitte |
| Thursday, January 31, 2019 <i>No later than 3:00 p.m. CST</i> | Deloitte will confirm chapter eligibility with Chapter Advocate |
| Friday, February 1, 2019 <i>No later than 3:00 p.m. CST</i> | Chapter Advocate communicates eligibility to chapters |
| Friday, April 26, 2019 <i>No later than 3:00 p.m. CST</i> | First place winners notify National Best Practices Coordinator of intention to compete at the annual meeting |
| Friday, May 10, 2019 <i>No later than 3:00 p.m. CST</i> | National Best Practices Coordinator notifies the BAP Executive Office of all participants |



Roles and Responsibilities

Chapter Advocate

1. After Chapters submit the abstract form for Best Practices via the BAP.org site and Regional Meeting site Deloitte communicates eligibility to Chapter Advocates
 - Timing: Refer to dates provided in timeline of events
 - Detail: Based on the evaluation of Deloitte, the Chapter Advocate advises each submitting chapter and the Host Chapter of the eligibility-to-compete decision.
2. Deloitte communicates eligibility to Chapter Advocates
 - Timing: Refer to dates provided in timeline of events
 - Detail: Based on the evaluation of Deloitte, the Chapter Advocate advises each submitting chapter and the Host Chapter of the eligibility-to-compete decision.
3. Communicate expectations to judging teams
 - Timing: Day of Best Practices presentations, prior to presentations
 - Detail: Chapter Advocates are responsible for prepping the judging teams prior to the Best Practices presentations.
 - Guidance:
 - ◆ First place winners earn the right to compete in a Best Practices competition at the annual meeting (see below for further details).
 - ◆ Judges act independent of any student, college/university, and chapter affiliation. Judges make themselves available to the winning team to provide feedback on content and/or the presentations' future planning.
 - ◆ Results, once submitted, are final.
4. Announce winners
 - Timing: Day of Best Practices presentations
 - Detail: During closing remarks, the Chapter Advocate provides the list of winners to the Deloitte Representative (Professional Partners, Board of Directors, or other chosen attendee) who announces the winners in each Best Practices category.

Host Chapter

1. Designate Best Practices Coordinator
 - Timing: September–January (prior to RM)
 - Detail: Each Host Chapter designates at least one student to manage and coordinate the Best Practices presentation process and maintain communications to participating chapters, Professional Partners Liaison, and Chapter Advocate.
 - Guidance: The Host Chapter(s) inform and remind chapters, the Professional Partners Liaison, Chapter Advocate, and judging teams regarding policies, procedures, and deadlines for abstract form submissions (see RM Manual), including, at a minimum, the following:
 - ◆ Name and email/mail address of the Chapter Advocate.
 - ◆ Abstract forms must be submitted to the BAP.org site and Regional Meeting site by date indicated in timeline of events.
 - ◆ Under no circumstances must an abstract form be sent to any other entity, including the Host Chapter(s). If done so accidentally, the Host Chapter must not read the submission and must inform the Chapter Advocate of the situation.
2. Schedule Best Practices presentations

- Timing: One week prior to RM
 - Detail: The Host Chapter schedules presentations in each Best Practices category simultaneously in separate rooms.
 - Guidance:
 - ◆ If all the presentations in a given category cannot be scheduled in one-time period, then schedule the remaining presentations in the following time period to ensure consecutive scheduling of presentations in the shortest time possible.
 - ◆ Ensure computer software and hardware are available and functioning in each presentation room.
 - ◆ Ensure all presentations are loaded on supporting hardware/computers and are accessible prior to session, which minimizes the transition time between presentations.
 - ◆ Reference Appendix B for complete presentation guidelines.
3. Submit rankings of competition and prepare awards
- Timing: Day of Best Practices competition
 - Details: The Host Chapter provides the identity and rankings of each Best Practices submission by the Chapter Advocate. The Host Chapter or conference planner prepares the award certificates and does not disseminate this information to anyone prior to the official award announcements.
 - Guidance:
 - ◆ The Host Chapter prepares evidence of placing first, second, or third, which typically includes a framed certificate.
 - ◆ The Host Chapter includes the Best Practices information in its final report (see RM Manual for details) due within seven days after the meeting. This information includes:
 1. Chapter name and number
 2. Best Practices category and placement (first, second, or third)
 3. Complete address to which to send the monetary award
 4. Names and email addresses of each presenting member and Faculty Advisor



Participating Chapters

1. Determine Best Practices projects, plan and execute event, and submit abstract form(s)
 - Timing: February–May (prior to RM or during spring of RM)
 - Detail: Participating chapters determine which categories they will compete in shortly after the announcement of the Best Practices categories. Chapters might find that designating a committee, ideally before the summer break, allows them to conduct the appropriate research and formulate plans. The substance of their work and efforts is summarized in the abstract submission form.
2. Submit abstract form(s)
 - Timing: Refer to dates provided in timeline of events
 - Detail: Participating chapters submit one abstract form for each Best Practices category for which they want to present. The online form needs to be started and submitted in one session. We highly recommend typing the responses for the abstract in a word document and cut/paste from the word document to complete the online form. Occasionally, a Best Practices category may have two or more subtopics; in such case, chapters may participate in only one of the available subtopic categories. Best Practices instructions issued by the Host Chapters must clearly state this limitation, when applicable. Chapters complete and submit the abstract form for Best Practices via the BAP.org site and Regional Meeting site. Abstract forms received after the deadline will be ineligible to receive verbal and monetary awards at the RM. Chapters will receive notification that their abstract form was received and accepted. Contact the Chapter Advocate with any questions or concerns. Please see Appendix A for abstract guidelines.
3. Prepare presentation—if eligible
 - Timing: Prior to RM
 - Detail: If eligible, the submitting chapter prepares an 8 minute presentation (8 minutes for the presentation and 2 minutes for the judges' Q&A session) based solely on the information found in the abstract form. Teams are not allowed to add new information or delete any information on the abstract form. Please see Appendix B for presentation guidelines.
4. Prepare presentation—if ineligible
 - Timing: At least 25 days prior to RM
 - Detail: If ineligible, the submitting chapter may still present its activities/ideas at the RM. However, it will not be eligible for verbal and monetary awards and will thus not be eligible to compete in the annual Best Practices competition. The ineligible chapter must inform the chapter and the Host Chapter of its decision to present no later than 25 days prior to the beginning of the RM to facilitate scheduling; otherwise, it will be ineligible to make a presentation. This option only exists if there are less than 10 competing chapters presenting in the category. Please see Appendix B for presentation guidelines.
5. Set up presentation
 - Timing: Day of Best Practices presentations
 - Detail: Presenting teams must be prepared for Best Practices presentations upon arrival.
6. Report results to Host Chapter—winning teams only
 - Timing: Within one week after presentation
 - Detail: Submitting chapters report one reaching-out activity (ROA), regardless of the number of presentations given. Each presenter reports one professional hour for his/her effort.

- Guidance:
 - ◆ Within seven days of the RM, winning chapters (first, second, and third place winners) must provide the Host Chapter via email with:
 1. Chapter name and number
 2. Best Practices category and placement (first, second, and third)
 3. Complete address to which the monetary award should be sent
 4. Names and email address of the Faculty Advisor and each presenting member
 5. Electronic package containing:
 - a. Abstract form originally submitted to the BAP.org site and Regional Meeting site
 - b. PowerPoint/Prezi presentation to be loaded onto the Best Practices website to showcase award-winning projects.



The Competition

Presenting Chapters Must

1. Determine time and location for presentation.
2. Deliver all presentation-related materials (including their presentation on a flash drive) to the appropriate location by 1:00 pm local time on the first day of the meeting. In the event of travel delays, the presentation must be emailed to bap@bap.org by 1:00 pm local time on the first day of the meeting.
3. Present the substance of their efforts or vision as summarized in their abstract form within 10 minutes (8 minutes for presentation and 2 minutes for judges' Q&A session). Reference Appendix B for presentation guidelines.

Judging Results

The Professional Partners Liaison selects judges independent of any student, college/university, and chapter affiliation. These judges are given the procedures and policies of the program and are expected to act accordingly to judge the presentation based on preset guidelines.

- First place winning teams will receive written and verbal feedback from judges on content and/or presentation.
- Second and third place winning teams will receive written feedback via judge's evaluation form, which will be sent from the BAP Executive Office to the Chapter Advisor within a week of the RM to share with participating chapters.
- Non-placing teams will receive feedback that provides developmental themes for all teams that competed in the category. Feedback may or may not be specific to each chapter but rather more general themes that the judges saw throughout the competition. General feedback will also be posted to the BAP website.
- Results, once submitted to the Chapter Advocate, are final.



Annual Meeting

Annual Meeting Procedures

Eligibility to Compete

All RM Best Practices winning Chapters that achieved a first place award 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. RM Host Chapters must include such information in all correspondence to all Chapters registered.

As soon as possible, after receiving a first place award, winning chapters must:

1. Notify the Best Practices Coordinator of their intention to compete at the annual meeting
2. If the chapter desires to compete, provide a copy of the presentation abstract form to the Best Practices Coordinator. Regarding the abstract forms, winning chapters must:
 - Amend the abstract form. The abstract form itself must essentially be the same as provided at the RM, while minor editorial/grammatical changes, reordering of major points, and updates to any results are permissible. The original abstract form must be submitted with the new abstract form so judges can review the changes made to the abstract form.

The Coordinator must provide to the BAP Executive Office the identity of and categories in which all winning chapters intend to compete to ensure adequate facilities are scheduled at the annual meeting.

Presentation Guidelines

All guidelines for the annual meeting are consistent with guidelines for the RMs. Reference Appendix B for Presentation Guidelines.

First place teams that will be competing at the annual meeting are permitted to make updates to their presentations. The abstract form itself must essentially be the same as provided at the RM, while minor editorial/grammatical changes, reordering of major points, and updates to any results are permissible. Updates on progress made between the regional and annual meetings should be included in the presentation.

Judging Results

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

Appendix

Appendix A

Abstract Guidelines

Thank you for participating the BAP Best Practices Competition. The abstract is a summary of the most important aspects of your project/idea. Information provided within this form, must concurrently be a summary of your intended presentation.

In order to be considered, Chapters must complete the online cover sheet and abstract form for Best Practices via the BAP.org site and Regional Meeting site **no later than 4:00 p.m. CST on Friday, January 25, 2019**. As a reminder, only 10 chapters will be selected to present for each topic at each regional meeting.

The following actions may result in disqualification:

- Failure responding to any of the questions on the abstract submission form
- Emailing the abstract to your Chapter Advocate or the BAP@bap.org
- All late submissions will automatically be disqualified

Abstract Submission Form

The online form needs to be started and submitted in one session. We highly recommend typing the responses for the abstract 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
- Region
- Topic

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 the Regional Meeting? (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 100 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 100 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 100 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 at the RM, 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 abstract 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 bring their presentation materials on a flash drive and provide it to the Host Chapter representative by 1:00 pm on the first day of the regional conference. If the presentation is not received by 1:00 pm, the team will be able to present, but will be disqualified from winning.
- Teams should present their Best Practice for no more than 8 minutes. Judges will have 2 minutes for a Q&A session following the 8 minute presentation.
- All BAP Best Practices presentation team members in attendance must have a speaking role during presentation.
- The advancement of slides and the use of audio or video during the presentation must be operated by a speaking member of the presentation team.
- 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 first place. Please visit <https://www.bap.org/rebrand-information> for the logo.
- Handouts are not permitted. Teams may not hand out materials to anyone attending the Best Practices competition, including judges or presentation attendees.
- Teams presenting on the same topic as in the previous year must clearly articulate the enhancements and statistical description between first and second years.
- Submitting chapters may desire to give their presentation in a region other than its own. If so, that chapter must coordinate directly with the Host Chapter of that region. Such presentations will not be eligible for verbal or monetary recognition.

Q&A Session

- If time is available after all presentations have been delivered, judges, faculty, and students may call upon presenters for additional Q&A. Only presenting students may answer questions. Non-presenting chapter members are not allowed to respond to questions.
- Faculty Advisors may not ask their presenting chapter questions during the Q&A presentation time.

Evaluation & Feedback

- Chapters will be evaluated on content delivered during formal 8 minute presentation and 2 minute Q&A session only. Any conversation following the formal presentation will not be considered during the evaluation process.
- The decision of the judges is final.
- Feedback will not be given at the national competition.

Technology

- The presentation may include various forms of AV aids (audio, video, poster board, props, PowerPoint, Prezi, etc.) to help communicate your project to the audience.
- Presenters must be prepared to present in the event of any technical difficulties (e.g., any supplementary electronic support systems fail to work).
- Technical difficulties associated with using technology (e.g., videos) will count against total presentation time.
- PowerPoint/Prezi presentations are limited to slides and photos only. Web access will not be allowed. Added audio or video must be limited to 60 seconds total — not one minute for each clip.
- If Prezi is being used, teams must have a backup presentation in PowerPoint in the event there are technical difficulties with Prezi.
- If using AV aids that require sound, note the only speakers made available will be the speakers on the computer. Additional speakers are permitted for use during the presentation but must be provided by the team requiring the speakers.
- A laptop and projector will be provided. Teams must use the computer and projector provided for the presentation. Internet access is not provided. Additional AV equipment requests will not be accommodated.
- No videotaping or audio taping of presentations is allowed at any of the meetings; however, the BAP Executive Office may decide to video, at their discretion, presentations at the annual meeting.
- Taking photographs while teams are presenting is not permitted at the regional or annual meeting.