

Best Practices:

A Procedure Manual for Best Practices

sponsored by **Deloitte.**

Updated August 2009

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Program Summary

"Best Practices" are activities that are created and completed by a chapter that further specific goals identified by the Board of Directors of Beta Alpha Psi and by Deloitte LLP (Deloitte). These activities should exemplify the spirit and purpose of Beta Alpha Psi and should, if applicable, allow other chapters to emulate those activities. Occasionally, the Board of Directors will ask chapters for their vision about some future activity/issue/topic; such vision should still be created by the chapter but cannot be completed nor emulated. Multi-year 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 at both the regional and national meetings since 2001. Its 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 selected each year by the President Elect and the Deloitte Forum Member. These topics involve such areas as ethics, corporate responsibility, diversity, increasing awareness of the accounting profession, skills-based volunteerism, and globalization. To date, there have been over 700 individual and team presentations at the regional and national levels and over \$210,000 awarded to Beta Alpha Psi chapters to support chapter operations, scholarships, and continuation of best practices projects.

All chapters are encouraged to share their Best Practices through a two step competitive process. Initially chapters will submit an abstract and, if found eligible, will make a presentation at their respective Regional Meetings. Winning chapters (1st, 2nd, 3rd place) will: (1) receive verbal recognition and monetary awards and, (2) the first place teams earn the right to give their presentations at BAP'S annual meeting. Winning chapters at the annual meeting will also earn verbal recognition and additional monetary awards.

This document is organized by topic as well as timeline format for each responsible party (see Section 3- "Roles & Responsibilities").

Awards

Deloitte funds the Best Practices competitions both at the Regional and Annual meetings. These award levels are set by the Board of Directors in agreement with Deloitte and are non-negotiable. Since final project rankings are not determined until the presentations are given, these awards are mailed by the Executive Office to the respective chapters receiving the awards.

At each of the eight regional meetings, there is a possibility of a first, second, and third place award for each Best Practice Category (see section 2- "Current Topics" for categories). However, if the judges determine that a presentation does not merit an award, one does not have to be given, or an Honourable Mention can be awarded.

As shown below, first, second, and third place for each topic presented at the regional meetings are awarded \$500, \$150, and \$125 respectively. At the Annual Meeting, each first, second, and third place for each topic is awarded \$1,000. Honourable mention awards do not receive monetary awards at either the Regional or Annual meetings.

Deloitte Best Practices				
Award Summary* (each topic presented)				
Level of Competition	1st	2nd	3rd	Total Awards
Regional Meeting (8)	\$ 500	\$ 250	\$ 125	\$21,000
Annual Meeting (1)	\$ 1,000	\$ 1,000	\$ 1,000	\$9,000
<i>* Honourable Mention designations do not receive monetary awards</i>				\$30,000

Timeline of Events

Spring (1 yr prior to RM)	BAP President Elect to propose Best Practice (BP) topics
Fall (prior to RM)	Forum Chair to designate Forum Liasons
August -January	Forum Liasons to form judging teams for regional meetings(RM) Chapters to determine topics to participate in, execute project, prepare abstracts Host Chapter to designate Best Practices Coordinator
<i>(no less than 40 days prior to RM)</i>	Chapters to submit abstracts to Chapter Advocate
40 days prior to RM	Chapter Advocate to forward abstracts to Forum Liason
30+ days prior to RM	Forum Liasons evaluate abstracts
<i>(no less than 30 days prior to RM)</i>	Forum Liasons to complete/submit eligibility evaluations to Chapter Advocate Chapter Advocate to communicate eligibility to chapters
<i>(prior to RM)</i>	Chapters to prepare Best Practices presentations
One week prior to RM	Host Chapter to schedule presentations
Day of BP Competition (RM)	Chapter Advocate to communicate judging expectations to BP judges Judges to attend briefing, evaluate presentations, determine winners (rankings) Host Chapter to submit rankings to Chapter Advocate and prepare certificates
<i>(no less than one week after RM)</i>	(if award recipient) Chapters to report results to Beta Alpha Psi Executive Office
<i>(no later than May 1 after RM)</i>	1 st Place winners notify National BP Coordinator of intention to compete at annual meeting
May 15 (prior to Annual Mtg)	National BP Coordinator notifies Executive Office of all participants National BP Coordinator begins preparing judging materials

Roles and Responsibilities

Beta Alpha Psi President Elect

1. Spring (1year prior to RM): Propose Best Practices Topics

The incoming president of Beta Alpha Psi (BAP), after consulting with Deloitte and the Board of Directors, is responsible for proposing Best Practice topics.

Guidance

- Topics developed and presented to the Deloitte Forum Member must involve such areas as ethics, corporate responsibility, diversity, early identification of financial information students, skills-based volunteerism, or globalization.
- Topics must be provided to the Executive Office prior to February 1 for the following academic year to permit chapters to begin planning activities or conducting research during the summer period.

Forum Liason & Forum Members

1. Fall (prior to RM): Designate Forum Liasons

The Forum Chairperson must designate one Forum Member to act as the Forum's Liaison to each regional meeting. This individual will be responsible for forming judging teams and reviewing the eligibility of participants for the Best Practices competition sponsored by Deloitte at each regional meeting.

Guidance

- Forum Liaisons are to be appointed not later than August of the year preceding the regional meetings.

2. August -January: Form Judging Teams for Regional Meetings

The Forum Liaison must, for each Best Practice category, form one judging team composed of the attending Forum Members or Board of Directors attendees. The Alumni Representative in attendance, as well as any Deloitte Forum representative or Board members in attendance must be included in the program as a judge. Judging teams (names, email addresses, phone numbers, and employer) must be formed and announced to the Chapter Advocate and Host Chapter no later than 30 days prior to the regional meeting.

Guidance

- If insufficient Forum members are available, other Board members may judge so long as there is no affiliation or direct connection between that person and any schools participating in the competition. Chapter Advocate must not participate as a judge at their own regional conferences.

3. (30+ days prior to Regional Meeting): Forum Liasons Evaluate Abstracts

- The Forum Liaison must evaluate each abstract to determine whether it meets the minimum requirements set forth by the Board of Directors as outlined in Appendix D.

Guidance

- Should the Forum Member evaluating the abstract need an answer to a question, that question must be directed initially to the Chapter Advocate, not the submitting chapter.

4. (No later than 30 days prior to the Regional Meeting): Complete and Submit Eligibility Evaluations

The Forum Liaison must, no later than 30 days prior to the start of the regional meeting, return each evaluation sheet to the Chapter Advocate with a decision as to eligibility for competition. See Appendix D for evaluation sheet. In turn, the Chapter Advocate will advise each submitting chapter and the host chapter whether the abstract will or will not be eligible for an award.

5. (Day of Best Practices Competition):

Attend Judge Briefing, Judge / Evaluate Presentations, Determine Winners

The Chapter Advocate will meet with all judging teams to explain the process, ensure consistent standards and answer any questions that the team members may have. Abstract and presentation guidelines and evaluation sheets will be provided by the Chapter Advocate before the competition begins (see Appendix A, C, E & Appendix F). Please note that when submitting the overall rankings of the presentations, it is not mandatory to award a 1st, 2nd, and 3rd place award. If the judges determine that a presentation does not merit an award, one does not have to be given, or an Honourable Mention can be awarded.

Guidance

Judging teams will be asked to:

- Evaluate the abstract before the presentation. Prior to the presentation, the abstract will be emailed by the Forum Liaison to the judges. The abstracts must be thoroughly read and evaluated using an evaluation worksheet provided in this manual at appendix E. (NOTE: There will be insufficient time on the day of the presentation to perform this function.).
- *Evaluate the presentation itself*, using an evaluation worksheet provided by the Chapter Advocate.
- Rank the entire submission. The abstract and presentation evaluations must then be combined after which all submissions must be ranked. In evaluating both items, the following guidelines must be considered:
 - To what degree were the category's goals achieved?
 - The evaluation worksheet provided is not meant to be definitive. Judges are to evaluate the stated components and use the results of the evaluation criteria in their deliberations.
 - Submissions must be ranked as first, second and third place. If the judges conclude that no submission in their category warrants a first place finish, they have the prerogative of awarding only a second and/or third place finish. Ties for second and third place finishes are permissible but there may be only one first place winner. Ties will split the monetary awards equally.
- As soon as possible after rankings have been determined, the judging team moderator must provide the Chapter Advocate with any documentation/checklists used to rank the Best Practice if such will not be retained by the judging team member.

Chapter Advocate

1. (40 days prior to Regional Meeting): Collect Abstracts

Cover pages (see Appendix B) and the abstracts will be submitted by Chapters to the Chapter Advocate by email no later than 40 days prior to the start of the regional meeting. Abstracts received after that date will be ineligible to receive verbal and monetary awards at the regional meeting.

Guidance

- Under no circumstances should an abstract be sent to any other entity, including the Host Chapter
- If an abstract is submitted to any other party accidentally, the Host Chapter must not read that submission but must inform the Chapter Advocate of the situation.
- The idea behind this requirement is to avoid any appearance of unfair advantage being gained by a Host Chapter who is also participating in a Best Practice competition.

2. (40 days prior to Regional Meeting): Forward Abstracts to Forum Liaison

The Chapter Advocate will forward via email 1) requirements of each Best Practice category, 2) an initial evaluation sheet for each abstract, and 3) all abstracts received to the Forum Liaison.

3. (No later than 30 days prior to Regional Meeting): Communicate Eligibility to Chapters

Based on the evaluation of the Forum Liaison, the Chapter Advocate will advise each *submitting* chapter and the Host Chapter whether the abstract will or will not be eligible for an award.

4. (Day of Best Practices Presentations)

Communicate Expectations to Judging Teams

Prior to the presentations the Chapter Advocate must distribute this procedures manual and meet with all judging teams to explain the process, ensure consistent standards and answer any questions that the team members may have. Abstract and presentation guidelines and evaluation sheets will be provided to judges by the Chapter Advocate before the competition begins (see Appendix A, C, E & Appendix F). Make note to the judges that when submitting the overall rankings of the presentations, it is not mandatory to award a 1st, 2nd, and 3rd place award. If the judges determine that a presentation does not merit an award, one does not have to be given, or an Honourable Mention can be awarded.

Guidance

- The lead judges will provide the Chapter Advocate and the Host Chapter with the identity and rankings of each Best Practice submission. The Host Chapter or conference planner will print the award certificates but not disseminate this information to anyone prior to the official award announcements.
- The first place winner earns the right to compete in a Best Practice competition at the annual meeting (see below for further details).
- Judges are to act independent of any student, college/university, and chapter affiliation. Judges are to be available to give feedback on content and/or the presentations future planning. Results, once submitted to the Director at Large, are final.

5. (Day of Best Practices Presentations)

Announce Winners

During the meeting closing remarks, the Chapter Advocate will provide the list of winners to the attending Deloitte representative (Forum, Board, or other chosen attendee) to announce the winners in each Best Practice category. Besides the verbal recognition, winning chapters will receive the following monetary awards as funded by Deloitte, LLP. Please see announcement script at Appendix G.

Host Chapter

1. (September -January prior to RM): Designate Best Practices Coordinator

Each Host Chapter must designate at least one student to manage and coordinate the Best Practices sponsored by Deloitte presentation process and maintain communications to participating chapters, forum liaison, and Chapter Advocate.

Guidance

- The Host Chapter(s) must inform and remind (as part of all required correspondence – see Regional Meeting Manual) chapters, the Forum Liaison, Chapter Advocate and judging teams about the policies, procedures and deadlines for abstract submissions including, as a minimum, the following:
 - Name and email/mail address of the Chapter Advocate.
 - Date abstracts must be submitted to the Chapter Advocate.
 - This date must be 40 days prior to the first day of the regional meeting.
 - Under no circumstances must an abstract be sent to any other entity, including the Host Chapter (s). If done so accidentally, the Host Chapter must not read that submission but must inform the Chapter Advocate of the situation.

2. (One week prior to Regional Meeting): Schedule Best Practices Presentations

The Host Chapter must schedule presentations in each Best Practice category simultaneously in separate rooms.

- If all the presentations in a given category cannot be scheduled in one time period, then the remaining presentations must be scheduled in the following time period so that all presentations are scheduled consecutively in the shortest time possible.
- Ensure computer software and hardware is available and functioning in each presentation room.
- Ensure all presentations are loaded on supporting hardware/computers and are accessible prior to session. This is intended to minimize the transition time between presentations.
- Participants may elect to use various visual aids including handouts, poster board, props, PowerPoint, etc. Please note that PowerPoint presentations are limited to slides and photos only. Web access and added Audio/Visual (AV) requests will not be accommodated.
- Provide one or more moderators for each session, who will serve as the master of ceremonies, introduce each presenting chapter, time each presentation, terminate each presentation if it exceeds 10 minutes (including Q&A), and close the session.
 - If time is available after all presentations have been delivered, judges may call upon additional Q&A for the presenters

3. (Day of Best Practices Competition): Submit Rankings of Competition/Prepare Awards

The Host Chapter will be given the identity and rankings of each Best Practice submission by the Chapter Advocate. The Host Chapter must prepare the award certificates, with the help of the conference planner, and not disseminate this information to anyone prior to the official award announcements

Guidance

- The Host Chapter must prepare some evidence of placing first, second or third. Typically this would be a framed certificate evidencing the accomplishment. Certificates will be provided by the Executive Office.

- The Host Chapter must include the Best Practices sponsored by Deloitte information in its final report (see mid-year meeting Manual for details.) due within seven days after the meeting. This information must include:
 - Chapter name and number
 - Best Practice sponsored by Deloitte category and place (1st, 2nd, and 3rd, if applicable)
 - Complete address to which the monetary award will be sent
 - Names and email address of the Faculty Advisor and each presenting member

Participating Chapters

1. (Feb- May prior to RM-Spring of RM)

Determine Best Practice Projects, Plan & Execute Event, Write Abstract(s)

Participating chapters must determine in which categories they will compete shortly after announcement of the Best Practice categories. For each category, they must designate a committee, ideally before the summer break to allow them to conduct the appropriate research and/or formulate plans. Once the requisite activities have been completed and/or ideas formulated, the substance of those efforts must be reduced to an “abstract.” An abstract summarizes the salient points of a larger piece of work, in this case, the presentation that will be made at the mid-year meeting. A PowerPoint presentation is NOT an abstract. Please see Appendix A for Abstract Guidelines and Appendix B for the Abstract Cover page.

2. (40 days prior to Regional Meeting) Submit Abstract(s)

In general, participating chapters must write one abstract for each Best Practice category in which they intend to present. Occasionally, a Best Practice category may have two or more sub-topics in which case, chapters may participate in only one of the available sub-topic categories. Best Practice instructions issued by the Host Chapters must clearly state this limitation, when applicable. A cover page (see Appendix B) and the abstract must be submitted by participating chapters to the Chapter Advocate by email not later than 40 days prior to the start of the regional meeting. Abstracts received after that date will be ineligible to receive verbal and monetary awards at the regional meeting. Chapters will receive verification that their abstracts are received and receive confirmation of their eligibility to present. If they do not receive verification, they need to contact the Chapter Advocate.

Guidance

- The abstract must not exceed one page (excluding the cover page), be in good form and free of grammatical and spelling errors. Sample abstracts from the prior year's Best Practice annual meeting competition may be found on the Beta Alpha Psi website (www.bap.org).

3. (Prior to Regional Meeting, If eligible) Prepare presentation

If eligible, the submitting chapter must proceed to prepare a 10 minute presentation (includes Q&A) based solely on the information found in the abstract. New information must not be added nor should other material found in the abstract be deleted when preparing the presentation.

Participants may elect to use various visual aids including handouts, poster board, props, PowerPoint, etc. Please note that PowerPoint presentations are limited to slides and photos only. Web access and added technology and Audio/Visual (AV) requests will not be accommodated. Please see Appendix C for Presentation Guidelines.

4. (At least 25 days prior to Regional Meeting, If ineligible) Prepare presentation

If ineligible, the submitting chapter may, at its preference, still present its activities/ideas at the regional meeting. However, it will not be eligible for verbal and monetary awards and will thus not be eligible to compete in the annual Best Practice competition. The ineligible chapter must inform the Chapter Advocate

and the Host Chapter of its decision to present not later than 25 days prior to the beginning of the regional meeting to facilitate scheduling; otherwise, it will be ineligible to make a presentation.

5. (Day of Best Practices Presentations) Set Up Presentations

Guidance

Submitting chapters must:

Bring their presentation materials on a flash drive and provide it to the Host Chapter representative in sufficient time for it to be loaded onto the hardware/computers in the presentation room prior to the presentation. Please note that PowerPoint presentations are limited to slides and photos only. Web access and added Audio/Visual (AV) requests will not be accommodated or permitted.

- Position any other supporting material in the presentation room prior to the Best Practice competition.
- Present their activity/idea within 10 minutes (includes Q&A). If time is available after all presentations have been delivered, judges may call upon additional Q&A for the presenters
- Presentations must be made only by the student members of the chapter (no faculty advisors or non BAP members/candidates).
- 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.

Note Regarding Judging Results:

Judges are selected by Forum Liaisons and are 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 pre-set guidelines. While judges are available to give feedback on content and/or the presentations for future planning, their results, once submitted to the Chapter Advocate, is final.

6. (Within one week after presentation, if winner) Report Results to Host Chapter

Submitting chapters must report only one Reaching Out Activity (ROA), regardless of the number of presentations given. Each presenter must report one professional hour for his/her effort.

Guidance

Within seven days of the regional meeting, winning chapters (1st, 2nd, and 3rd place winners) must provide the Host Chapter via email with:

- Chapter name and number
- Best Practice category and place (1st, 2nd, and 3rd)
- Complete address to which the monetary award should be sent
- Names and email address of the Faculty Advisor and each presenting member
- Electronic package containing: 1) Cover Page originally submitted to Chapter Advocate, 2) Abstract, 3) PowerPoint presentation. This will be loaded onto the Best Practices website to showcase award-winning projects.

Annual Meeting Procedures

Eligibility to Compete

All mid-year meeting Best Practice winning **CHAPTERS** who achieved a first place award at a regional meeting are eligible to compete in the best practices competition at the annual meeting.

The Annual Meeting Chairperson, in coordination with the **CHAPTER ADVOCATE** will designate a Best Practice Coordinator. The **EXECUTIVE OFFICE** will ensure the identity and contact information of the Coordinator is provided to all Directors and **HOST CHAPTERS** by February 1. Regional meeting **HOST CHAPTERS** must include that information in all correspondence to all **CHAPTERS** registered.

As soon as possible after receiving a first place award but not later than May 1, winning chapters must:

- Notify the Best Practice Coordinator of its intention to compete at the annual meeting;
- If the chapter desires to compete, provide a copy of its presentation abstract, including cover page, to the Best Practice Coordinator. Regarding those abstracts, winning chapters must:
 - Revisit the abstract guidelines at Appendix A.
(The abstract must not exceed one page (excluding a cover page), be in good form and free of grammatical and spelling errors. Sample abstracts from the prior year's Best Practice annual meeting competition may be found on the Beta Alpha Psi website.)
 - Amend/update the cover sheet as needed to include annual meeting presenters and contact information,
 - Amend the abstract. The abstract itself must essentially be the same as that provided for the mid-year meeting. While minor editorial/grammatical changes and reordering of major points are permissible, under no circumstances must new information be inserted into the abstract (or presentation).

The Coordinator must provide to the **EXECUTIVE OFFICE** not later than May 15th the identity of and categories in which all winning chapters intend to compete so that adequate facilities are scheduled at the annual meeting.

Planning for the Presentations

The **EXECUTIVE OFFICE** and/or the Annual Meeting Chairperson, in conjunction with the Best Practice Coordinator, must:

- Schedule the Best Practices sessions so they occur as early as possible after the morning or lunch sessions to allow chapters to adequately prepare for their presentations.
- Include the location, time and date of each Best Practice competition in the Annual Meeting instructions (and web page). Ensure functioning computer and projection hardware are in place at least one hour before the scheduled competitions. Please note that participants may elect to use various visual aids including handouts, poster board, props, PowerPoint, etc. However, PowerPoint presentations are limited to slides and photos only. Web access and added Audio/Visual (AV) requests will not be accommodated or permitted.
- Ensure a qualified person is present at the designated time in the room prior to the presentation to assist in loading presentation software/programs. Exact information as to the time the computer(s) will be available to load the presentation will be communicated to the presenting chapters prior to the annual meeting by the Best Practices Coordinator.
- Determine the order in which presentations will be delivered. Such order must be determined randomly.

Planning for Judging the Presentations

The **FORUM LIAISON** must, 30 days prior to the meeting:

- Compile a list of **FORUM** members wishing to judge best practice competitions, including one Deloitte Representative.
- Form judging teams of at least three persons for each Best Practice category.
- Distribute this Best Practices Procedures manual to each judge to familiarize themselves with the program. (Abstract and presentation guidelines and evaluation sheets will be provided to judges by the Chapter Advocate before the competition begins (see Appendix A, C, E & Appendix F)
- Designate a judging team member as the lead judge. Where possible, this person must have had prior judging experience at an annual or regional meeting and must not have judged same Best Practice category at any regional meeting. Lead Judge responsibilities are discussed below.
- Provide the **EXECUTIVE OFFICE**, Best Practice Coordinator, and Annual Meeting Chairperson with the names, email addresses and phone numbers of each judge. (The **EXECUTIVE OFFICE** must include the names and company affiliations of judges in its meeting program.)

The Best Practice Coordinator, in conjunction with the Forum Liaison, Executive Office, Annual Meeting Chair, must:

- Prepare a packet for each judge that includes:
 - This Best Practices Procedures Manual
 - The goal and guidelines for each Best Practice category.
 - The abstracts from competing chapter.
 - The Evaluation forms for each scheduled presentation. NOTE: While evaluation forms may be modified at the judge's discretion from those used at the mid-year meeting, mid-year meeting evaluation forms must nevertheless be included in this packet as a reference.
- Distribute that packet to all judges prior to the meeting's opening session, allowing judges to familiarize themselves with the forthcoming presentations.

NOTE: Generally, there is insufficient time at the meeting itself to fully review all abstracts and familiarize one's self with all judging guidelines/procedures/responsibilities. It must also be communicated to the judges that when submitting the overall rankings of the presentations, it is not mandatory to award a 1st, 2nd, and 3rd place award. If the judges determine that a presentation does not merit an award, one does not have to be given, or an Honourable Mention can be awarded.

The Lead Judge must:

- Designate a moderator, timer and door guard for each completion.
 - The moderator (if not the lead judge) must obtain the identity of and announce each presenting school.
 - The timer must ensure no presentation goes beyond 10 minutes (time includes Q&A). If time is available after all presentations have been delivered, judges may call upon additional Q&A for the presenters.
 - The door guard must ensure no one enters or exits a presentation while it is in process. Entrance or exit between presentations is permissible.
- Meet with his/her team members informally prior to the competition to answer questions and ensure procedures and responsibilities are understood. See the competition below for more details concerning the judging process.
- Report the competition results to the Best Practice Coordinator on the Script for Announcement of Winners (Appendix G).

The Competition

Presenting chapters must:

- Determine when and where their presentation will be given.
- Deliver all presentation-related materials (including their presentation on a flash drive) to the appropriate location at the designated time prior to the scheduled presentation.
- Competing chapters must present the substance of their efforts or vision as summarized in their abstract within ten minutes. The presentation may take any form but must be professional in nature.

When a presentation ends, sufficient time must be given for the audience to ask questions. Generally, questions must not continue beyond five minutes. Before beginning the next presentation, the Moderator must ensure the judging team is ready for the next presentation.

Judging teams must record their individual observations about each presentation. Summarizing the annual meeting evaluation form instructions:

- *Evaluation Form* - A generic evaluation form will have been provided as guidance. The criteria on this form convey the general goals of the Board for the Best Practices competition. However, it is NOT meant to be a definitive piece of work that encompasses every aspect of the broad range of presentations and activities that will be 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 that must allow the individual judge some discretion in the applicability and weighting of the criteria to establish their competitive rankings.

After Presentations are Completed

Judging teams, under the guidance of the lead judge must meet privately to evaluate all presentations. After first, second and third place winners have been determined; the lead judge must inform the Best Practice Coordinator of the winners on the Script for Announcement of Winners (Appendix G).

In turn, the Coordinator must inform the **EXECUTIVE OFFICE** and **DELOITTE REPRESENTATIVE** (Forum, Board, or other chosen attendee) of all winners by submitting to them a completed "Script for Announcing Winners"- see Appendix G.

The **EXECUTIVE OFFICE**, in conjunction with the Best Practice Coordinator, must prepare the necessary certificates and, as soon thereafter as possible, forward the monetary awards to those chapters (currently \$1,000 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 (Forum, Board, or other chosen attendee) via a completed "Script for Announcing Winners" (see Appendix G) to announce the winners in each Best Practice category.

After the awards are presented at the closing ceremony, judges must make themselves available after the meeting has ended to give a chapter individual feedback on their presentations. Judges must retain their evaluations until it is apparent they are no longer needed.

The decision of the judges is final. Presenting chapters who seek comments from the judges must accept that feedback as constructive and unchangeable.

Appendix A:

Best Practices sponsored by **Deloitte.**

Abstract Guidelines

The abstract must be a one-page summary of the most important aspects of your project/idea. It must concurrently be a summary of your intended presentation. The following guide illustrates the proper format for a Best Practices abstract.

Required Content- Each abstract submitted must contain the following standard paragraphs which clearly address the points below:

1. Statement which directly addresses a Best Practice category provided by the national office.
2. An outline of the project
 - Goals of the project
 - Outcomes or expected outcomes if the project is yet to be completed at the time of the regional meeting
3. Member involvement
 - Number of members participating in the project
 - Description of non-member participants and their roles
 - Member hours spent on project
4. Project Assessment
 - An assessment of the benefits to the chapter and others served by the project (i.e., lessons learned, etc.)
 - Addresses what effects the project had, or will have, on the community, chapter members, BAP, etc.
 - A description of any copyrighted material to be used in the presentation.
 - *(If a multi-year project is submitted)* Emphasis on enhancements and statistical description of improvements from previous two years

Writing Component- Each abstract must convey professionalism and will be evaluated using the following guidelines. Please consider the following guidelines in preparing your abstract.

5. Abstract is free from mechanical errors (grammatical, spelling, etc.)
 - The abstract is well edited and polished.
6. Material is arranged in logical sequence
 - Ideas are well organized and conveyed in a well defined structure. This structure must include clear title, introductory, body, and conclusion sections.
 - Underlying ideas and themes are summarized to leave the reader with a clear idea of what your abstract was trying to convey.
7. Writing style conveys professionalism.
 - Writer uses a professional writing style.

Appendix B:

****Each abstract submitted must have a cover page attached containing the following information****

Abstract Cover Page for Best Practices sponsored by **Deloitte.**

Greek name/number of SUBMITTING CHAPTER _____

Official school name _____

Best Practice category to which the abstract applies _____

Is the project a multi-year submission (was submitted in prior years) _____

Student (with email address) to contact regarding this abstract _____

Faculty Advisor's name, email address, and phone number _____

Copyright statement

The following copyright material is included in this abstract (and will be used in our presentation).
Permission has been received from the copyright holder to use the related information.

(List each copyright protected item used in the abstract)

Complete name and address to mail awards if and when earned _____

Names of students that will be making the presentation. _____

Appendix C:

Best Practices sponsored by **Deloitte.**

Presentation Guidelines

These guidelines are intended to help chapter members and pledges to present a professional presentation at the regional meeting which will showcase your chapter's idea/project

General Guidelines

1. The presentation must be a professional presentation, and convey the idea / project clearly
2. The presentation may include various forms of visual aids (audio, handouts, poster board, props, PowerPoint, etc.) to help communicate your project to the audience.
 - Note: Presenters must be prepared to present in the event of any technical difficulties (i.e any supplementary electronic support systems not work)
 - PowerPoint presentations are limited to slides and photos only. Web access will not be allowed and added Audio/Visual (AV) requests will not be accommodated.
3. All firm/corporate/professional logos that are copyrighted must not be included in presentations without proper approval.

Required Content

1. Focus on **one** idea/project that fits under the selected Best Practices category.
 - Informative beginning (Introduction of presenters and topic)
2. Presentation must address relevant points discussed in the corresponding submitted abstract
3. The presentation must include evidence of the success of your project when appropriate.
 - At a minimum, the project must be something your chapter is doing in the current year (not just a great idea, but something the chapter is actually doing).
 - *(If a multi-year project is submitted)* Emphasis on enhancements and statistical description of improvements from previous two years
4. Presentations are strictly limited to 10 minutes (includes Q&A).
 - Any and all presentations that extend beyond 10 minutes will be stopped and the violation will be noted in the presentation evaluations.
 - If time is available after all presentations have been delivered, judges may call upon additional Q&A for the presenters

Appendix D:

Best Practices sponsored by **Deloitte.**

Eligibility Evaluation Form

(To be distributed only to judging team members)

SUBMITTING SCHOOL _____

Category _____

1. In consideration to the applicable topics detailed in Section 2 “Current Topics” were the topic’s requirements fulfilled? (to be completed by the FORUM Liaison)

<u>REQUIREMENTS</u>	<u>YES</u>	<u>NO</u>	<u>NOT APPARENT</u>
Does the project address the respective topic?			
Was the project completed? (if applicable)			
Was the project successful?			
Was the program developed by the chapter (as opposed to by others)?			
Does the project involve widespread member involvement?			
Is the project applicable / transferrable to other chapters?			
(If multi-year project) Was there emphasis on enhancements and statistical description of improvements from previous two years?			

2. Considering the above, were the topic’s requirements met? Yes No

If you circled No (the requirements were not fulfilled) the submission will not be allowed to compete for a monetary award (1st, 2nd, or 3rd place) at the mid-year meetings level nor compete for awards at the national level.

(At the chapter’s option, it still may present its efforts/plans at the regional meeting, time permitting)

3. Additional comments to bring the abstract up to minimum standards

Appendix E:

Best Practices sponsored by **Deloitte.**

Abstract Evaluation Form

SUBMITTING SCHOOL _____

Category _____

ABSTRACT - Please rate projects using a scale of 0-5, using the scale below as a guide

- 5 = Excellent, practically void of any issues/problems
- 3 = A few problems/issues/deviations; average
- 1 = Below expectations but at least acceptable
- 0 = Does not meet minimum acceptable requirements

	YES	NO
	(scale of 1-5)	0
Evaluation of Idea and Results		
<p><i>Consider the following points in your evaluation:</i></p> <ul style="list-style-type: none"> • Goals of the project. (relevant, meaningful, show originality of thought) • A narrative description of member and nonmember activities • A quantified description of member and nonmember participation (numbers/hours, etc.) • Description of actual or expected outcomes • An assessment of the immediate and/or future benefits to the chapter/others • Adaptability to other chapters • (If multi-year project) Emphasis on enhancements and statistical description of improvements from previous two years 		
Evaluation of Writing Component		
<p><i>Consider the following points in your evaluation:</i></p> <ul style="list-style-type: none"> •Presents material in a logical sequence • Free of grammatical errors • Includes a concrete conclusion/end • Written in a professional style • Shows clarity of thought 		
TOTAL POINTS		

Appendix F:

Best Practices sponsored by **Deloitte.**

Presentation Evaluation Form

SUBMITTING SCHOOL _____

Category _____

PRESENTATION - Please rate projects using a scale of 0-5, using the scale below as a guide

- 5 = Excellent, practically void of any issues/problems
- 3 = A few problems/issues/deviations; average
- 1 = Below expectations but at least acceptable
- 0 = Does not meet minimum acceptable requirements

	YES	NO
	(scale of 1-5)	0
Evaluation of Content		
<p><i>Consider the following points in your evaluation:</i></p> <ul style="list-style-type: none"> • Chapter involvement (number of participants and hours) • Conclusions/outcomes/benefits clearly stated • Time used was appropriate to the topic and within 10 minutes • Asked for questions/comments and responded convincingly and thoroughly • Matched the content of the abstract • (if applicable) Multi-year project emphasized enhancements from prior years using description and statistics 		
Evaluation of Delivery		
<p><i>Consider the following points in your evaluation:</i></p> <ul style="list-style-type: none"> • Speaker animation/enthusiasm/energy, i.e., convincing • Appropriate use of technology (within guidelines of use) • Quality of presentation aids used (hand-outs, multimedia, PowerPoint, graphics) • Eye contact (void of reading notes) 		
TOTAL POINTS		

Appendix G:

Best Practices sponsored by **Deloitte.**

Script for Announcement of Winners

My name is (insert name here). On behalf of Deloitte, we thank Beta Alpha Psi for allowing Deloitte to sponsor the Best Practices Competition, and thank you to each of the participants today for your dedication to your chapters and communities.

Deloitte has been the proud sponsor of the Best Practices program at both the regional 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 over 700 individual and team presentations at the regional and national levels and over \$210,000 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 regional meeting competitions, and each first place winner will be invited to compete in the national 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 Advisory Forum and any Board Members that judged these presentations. **And now for the winners:**

Category #1- (insert category title)

Third Place goes to: _____

Second Place goes to: _____

The First Place winner is: _____

Category #2- (insert category title)

Third Place goes to: _____

Second Place goes to: _____

The First Place winner is: _____

Category #3- (insert category title)

Third Place goes to: _____

Second Place goes to: _____

The First Place winner is: _____