



Beta Alpha Psi
Officer Transition Document

Officer tasks and responsibilities

We are aware that not every chapter has each of these roles. Please take the tasks and divide amongst officers as your chapter sees fit. Please make this a collaborative process with your faculty advisor. If you have any questions, please email us at bap@bapeo.org

President tasks

- Run weekly meetings
- Create agenda for officer meetings
- Create sense of community for members
- Get to know each officer 1:1
- Finalize speakers each quarter/semester
- Read and stay up to date on emails and posts from the Executive Office (share information as applicable)

Finance tasks

- Invoice firms (as needed)
- Deposits (from companies and Executive Office) on a timely basis
- Process member payments within 60 days of records being entered into the Reporting Intranet
- Process any payments for chapter. Chapter maintenance fee is due on October 15.
- Oversee QuickBooks or other accounting software chapter is using
- Find additional funding for chapter (as needed)
- Prepare 990n e-postcard or Over \$50K spreadsheet in May and send confirmation to bap@bapeo.org

Reporting tasks

- Input information into the Executive Office Reporting Intranet, review Reporting Intranet Guide [here](#)
- Take attendance at weekly meetings (or ensure attendance is being taken)
- Maintain accurate individual and chapter wide community service and professional participation hours for entire chapter
- Answer questions about types of activities that qualify for professional/community service hours
- Ensure chapter compliance with the Executive Office Program for Chapter Activities (PCA) [here](#)
- U.S. Chapters: Beginning of Year report due October 15, Mid-Year report due December 15, End of Year report due June 1
- Oceania Chapters: Beginning of Year report due June 15, Mid-Year report due Aug 15, End of Year report due December 15
- Maintain current candidate and membership rosters

Membership tasks

- Communicate and build relationships with members (new and existing)
- Field questions from new candidates
- Host event for new candidates
- Keep track of hours for new candidates and share with Reporting officer
- Be the main point of contact for new candidates
- Send email to new candidates letting them know how many hours they need to be initiated/how they may obtain those hours

Public Relations/Social Media/Webmaster tasks

- Send emails to chapter (if applicable)
- Update website and social media regularly (maintain BAP Executive Office branding)
 - If you have questions, email bap@bapeo.org
- Brainstorm and implement social events (with meeting planner, if applicable)

Meeting Programming tasks

- Connect the chapter together (through weekly meetings, community service and outside events and activities)
- Plan events in advance (food, logistics, etc.)
- Send thank you cards to firms after meetings (after they speak or sponsor)
- Brainstorm and implement new events for your chapter to engage members who may not feel included
- Host 'Meet the Firms' event, maintain relationship with recruiters and professional partner organizations

Competition tasks

- Review upcoming deadlines and competition guidelines and plan accordingly
- Oversee Best Practices
- Prepare abstracts and review presentations
- Gold chapter video (if applicable)

Community Service tasks

- Coordinate community service events and work with Public Relations/Social Media officer to share information to chapter
- Serve as the primary contact for community service liaisons
- Communicate with chapter frequently to ensure everyone has enough service opportunities to fulfill the activities requirements
- Report service activities to Reporting officer