

INVEST IN YOUR FUTURE

Beta Alpha Psi | 2021
Annual Report





2021 BETA ALPHA PSI ANNUAL REPORT

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To review the Beta Alpha Psi audited financials, visit:
bap.org/2021-annual-report

VISION STATEMENT

Beta Alpha Psi will shape the financial and business information professions by developing members into ethical, professional, and confident leaders.

MISSION STATEMENT

The mission of Beta Alpha Psi, the premier international honor and service organization for financial and business information students and professionals, is to inspire and support excellence by:

- ▶ encouraging the study of accounting, finance, business analytics or digital technology;
- ▶ providing opportunities for service, professional development, and interaction among members and financial professionals; and
- ▶ fostering lifelong ethical, social, and public responsibilities.

BETA ALPHA PSI EXECUTIVE OFFICE STAFF



Margaret Fiorentino
Executive Director



Lisa Wicker
Manager, Chapter Services



Lauren Peck
Manager, Marketing



INVEST IN YOUR FUTURE

Our theme for the 2020–21 year was **“Invest in Your Future.”** This theme encompasses many of the reasons that membership in Beta Alpha Psi makes sense for financial information professionals. First, you need to arm yourselves with skills to enable you to succeed in the business world. Second, you have a responsibility to provide opportunities to others in your school and the community at large. Third, by serving your school and community, you benefit from a stronger society.

None of us imagined that the 2020–21 academic year would look much like the last few months of the 2019–20 year. Unfortunately, it did, but this time we all were better prepared to deal with less than ideal circumstances. Our Executive Office made available a vast array of resources to aid faculty advisors and chapters. Our Professional Partners provided a significant library of programming that chapters could use for professional programs. They were also ready and willing to meet with chapters on Zoom. Chapters were not limited by travel distance when scheduling speakers/professionals or having joint meetings with other chapters. This activity may be carried into the future and benefit many. The Executive Office and Chapter Advocates offered a variety of ideas for recruiting students, community service projects and team-building for chapters.

In January 2021, BAP launched a new program, the Executive Graduate Honor (EGH). This honor provided high-performing graduate students access to our international Alumni & Member Network, as well as opportunities to attend exclusive webinars provided by our Professional Partners. As of July 2021, 143 graduate students have been officially recognized for this honor. We expect that number to continue to grow in 2021–22.

Beta Alpha Psi continued to make it possible for students to invest in their future by acquiring skills that will help them be work-ready. Technical skills not covered in the classroom, leadership opportunities and access to a worldwide network have real value to financial information professionals and will continue to add value when they enter the workforce. Service projects (many that were conducted virtually) meant our students could give back to their school and the greater community. With KPMG's support and leadership, food support was provided to schools and other organizations in Las Vegas, Nevada, where we had hoped to meet in person for our Annual Meeting. School supplies and books were provided to several groups in the Las Vegas area and many chapters collected school supplies for elementary schools close to their university. Those supplies make a huge difference in a child's performance and how they feel about school.

Although we could not meet in person, we had three virtual Mid-Year meetings as well as the Annual Meeting in August. Inspirational keynote speakers, professional development sessions, alumni panels, community service and opportunities to share Best Practices were available for participants.

We all hope that the upcoming 2021–22 academic year will allow us to have in-person experiences again. However, after 15 months of living virtually, there will be challenges for chapters and advisors. The Executive Office has a “Chapter Reboot Program” kickoff planned with virtual events for candidate recruitment, interactive chapter reporting and diversity and inclusion sessions. The Professional Partners have free CPE available for faculty advisors for 30 days following the Annual Meeting.

No letter from the president should miss the opportunity to thank all the people who make BAP the organization it is. A special thanks to Margaret Fiorentino, our Executive Director who has shown great vision in dealing with the challenges of the last year. Staff members Lisa Wicker and Lauren Peck adapted to changes gracefully. Brian McGuire, Past President (2019–20), helped us to move to a virtual programming world with his calm demeanor. Board members were willing to meet all challenges. Our Chapter Advocates were the “feet on the ground” to keep us aware of the challenges chapters were experiencing. Faculty Advisors kept their chapters moving forward even though a lot of their other duties were taking more time. Our Alumni Representatives helped improve the Alumni & Member Network and provided valuable input on programming. Our Professional Partners gave of their resources beyond any reasonable expectation. Student members and leaders kept the dream alive.

Beta Alpha Psi is special because all of these groups believe in it and are willing to do their part. I can hardly wait to see what we all accomplish this next year.

A handwritten signature in black ink that reads "Rita H. Grant". The signature is fluid and cursive, with the first name "Rita" being the most prominent.

Rita Grant
President, Beta Alpha Psi, 2020–21

BOARD OF DIRECTORS

UPDATES FOR THE YEAR:

► Strategic Plan Recap for 2020–21

• Mission and Growth

- Alumni and Member Network in August 2020 to include members and alumni
- BAP website was refreshed and launched in the fall of 2020
- Launched (January 2021) a new graduate student honor recognition — Executive Graduate Honor (EGH)
 - 91 EGH recipients as of April 30
 - 11 schools who have participated

• Financial Transparency

- Continued to move funds from matured CDs to both CDARS and ICS program
- FY22 Budget approved by the board.
- Both internal and external audits were conducted and completed between May and July 2021

• Customer/Stakeholders & COVID-19 Response

- Reviewed and updated our Strategic Priorities:
 - BAP Value Proposition — Review and Define Overall Value Proposition
 - Financial Oversight — Forecast, Plan, Engage and Retain
 - Our Chapters — Stabilize, Retain and Grow Chapter Value
 - Our Members — Diversify and Grow Membership
 - Our Alumni — Engage, Retain and Grow Alumni Member Base
 - Value Driven Collaboration — Strengthen, Diversity and Grow Professional Partnerships and Sponsors
 - Governance — Attract, Engage and Retain Board Members to Future Proof Beta Alpha Psi

- Continued to provide excellent communication resources to our members via the monthly BAP Bulletins, BAP Alerts and the quarterly BAP Newsletters, as well as social media

• COVID-19 response

- Due to the coronavirus the 2021 regional meetings had to be canceled and rebooked for 2022; conducted 3 mid-year meetings where we had over 1,000 attendees

- Professional Partners provided free webinars and webcasts for candidates and members to access and report hours so that they can maintain their reporting hours
- Collaborated with sponsors for the BAP competitions to submit presentations virtually to continue to recognize chapters in Best Practices, Gold Challenge, Superior and Distinguished chapters, Project Run With It, Medal of Inspiration, Business Professional of the Year, Outstanding Dean and Outstanding Faculty Advisor awards
- Canceled the in-person 2021 Annual Meeting and offered the following for our candidates, members and faculty advisors:
 - A live virtual session that took place over two days, Thursday, Aug. 5 and Friday, Aug. 6:
 - Offered Keynote address by Incoming President-elect Kimberly Ellison-Taylor and a Community Service Day event where chapters can provide school supplies to underrepresented elementary schools in their communities.
- Fall 2021 — Chapter Reboot Program Kickoff:
 - Virtual events provide by the Executive Office for candidate recruitment, interactive chapter reporting and diversity and inclusion sessions.
- Offering free CPE for Faculty Advisors to access for 30 days following the live virtual session
- **Governance**
 - Working on establishing a board led Diversity & Inclusion Council
- **Internal Business Processes**
 - Signed the BAP/AICPA agreement — September 2020.
 - BAP Staff adapted to working from home during the pandemic while maintaining a professional level of customer service to our students and faculty members

BOARD OF DIRECTORS

BOARD OF DIRECTORS — CURRENT



Rita Grant
President



Scott McQuillan
President-elect



Brian McGuire, Ph.D.
Past President



Barbara Ritter, Ph.D.
Dean Representative



Jan Taylor Morris, Ph.D.
AICPA Liaison



Pearl Rozenberg
Director of Global Activities



Raymond Elson, DBA
Director of Administration



Alicia Fleri
At-Large Director for Business
Analytics and Digital Technology



Steven Mezzio, Ph.D.
At-Large Director
for Innovation



Michael Mullen
At-Large Director
or Finance



Michael Brown
Professional Partner
Chair



Valerie Wendt
Professional Partner
Chair-elect



Wilson Ling
International Alumni
Representative



McKenzie Gravitt
International Alumni
Representative



Marci Butterfield
3rd Year Chapter
Advocate



Dori Danko
3rd Year Chapter
Advocate



Julie Harrison, Ph.D.
3rd Year Chapter
Advocate

BOARD OF DIRECTORS — INCOMING



Kimberly Ellison-Taylor
President-elect



Sandra Cereola, Ph.D.
3rd Year
Chapter Advocate



Cassy Henderson, Ph.D.
3rd Year
Chapter Advocate

CHAPTER ADVOCATES

UPDATES FOR THE YEAR:

- ▶ PCA non-hours review and collection of feedback on proposal
- ▶ Executive Graduate Honor outreach and kickoff of the new membership
- ▶ Virtual Mid-year Meeting planning with the Executive Office
- ▶ Chapter Reboot materials for fall 2021
- ▶ Selected Outstanding Faculty Advisors for 2021
- ▶ Annual Meeting planning
- ▶ Update of manuals
- ▶ Selection of new Chapter Advocates
- ▶ Support for chapters navigating a new generation of students and the virtual world

CHAPTER ADVOCATES — CURRENT

▶ 3rd Year



Marci Butterfield
Rocky Mountain and
Missouri Valley Regions



Dori Danko
Midwest Region



Julie Harrison, Ph.D.
Oceania Region

▶ 2nd Year



Sandra Cereola, Ph.D.
Atlantic Coast Region



Cassy Henderson, Ph.D.
Southwest region

▶ 1st Year



Mark Judd
Western and
Northwest Regions



Lisa Owens-Jackson, Ph.D.
Southeast Region

CHAPTER ADVOCATES — INCOMING



Fred Ng, Ph.D.
Oceania Region



Jason Stanfield, Ph.D.
Midwest Region

PROFESSIONAL PARTNERS

The Beta Alpha Psi Professional Partners further the mission of Beta Alpha Psi. The Professional Partner representatives financially support Beta Alpha Psi through annual partner fees, which subsidize the regional and annual meetings each year. These representatives use their professional networks to secure speakers for these meetings or deliver their presentations. Additionally, these representatives function as judges for the annual Best Practices competition, review nominations and select winners for other competitions and awards. Many partners also sponsor a competition or award.

► Associations/not-for-profits

- Accounting & Financial Women's Alliance (AFWA)
- AICPA
- American Accounting Association (AAA)
- Association of Government Accountants (AGA)
- CAIA
- Center for Audit Quality (CAQ)
- CFA Institute
- Educational Foundation for Women in Accounting (EFWA)
- International Association for Accounting Education and Research (IAAER)
- The Institute of Internal Auditors (IIA)
- Institute of Management Accountants (IMA)
- The NASBA Center for the Public Trust

► Professional education/exam providers

- Becker Professional Education
- Gleim Exam Prep
- Surgent Professional Education
- UWorld
- Wiley Efficient Learning

► Firms and industry

- Aprio
- BDO USA LLP
- Deloitte LLP
- EY
- Fifth Third Bank
- FloQast
- Grant Thornton LLP
- KPMG LLP
- Moss Adams LLP
- Protiviti
- PwC
- Robert Half
- RSM US LLP
- Wipfli LLP
- Xero

► State societies

- California Society of CPAs (CalCPA)
- Illinois CPA Society
- Indiana CPA Society
- Maryland Association of CPAs (MACPA)
- Texas Society of CPAs
- Washington Society of CPAs

► Incoming partner

- MYOB

► Updates for the year

- Expand professional partner value proposition
 - Supported first year of Executive Graduate Honor (EGH)
 - Delivered high-quality webinars and pre-recorded content to support chapters and alumni virtually
- Increased new partner recruiting to focus on non-traditional organizations
 - MYOB — first Professional Partner representing the Oceania region
- Virtual Initiations, Mid-Year Meetings and Annual Meeting
 - Delivered over 20 virtual professional presentations at all three Mid-Year and the Annual Meetings
 - Participated in student networking including virtual exhibit hall and social activities
 - Provided professional sessions for the live virtual initiations
- Best Practices Competition
 - Standardized procedures to effectively judge the entire competition virtually
 - Successfully judged entries from all nine regions and regional winners that submitted for the Annual Meeting competition

PROFESSIONAL PARTNERS

ASSOCIATIONS AND NOT-FOR-PROFITS



PROFESSIONAL EDUCATION AND EXAM PROVIDERS



PROFESSIONAL PARTNERS (CONTINUED)

FIRMS AND INDUSTRY



STATE SOCIETIES



INCOMING PROFESSIONAL PARTNER



2020–21 GROWTH AND ADAPTATION TO COVID-19

► Expansion in 2020–21

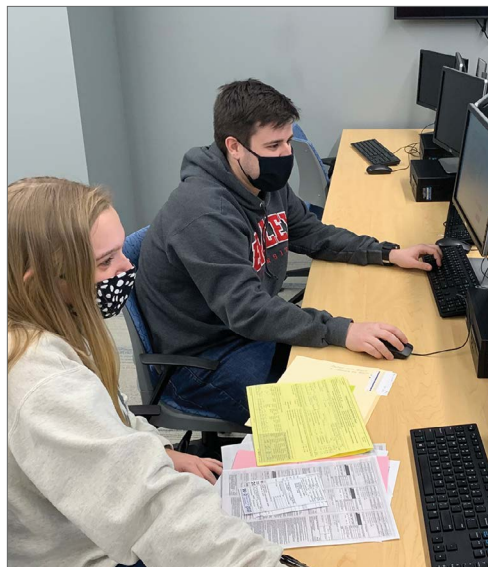
- 3 new petitioning chapters
- 319 active chapters

► Oceania and International Region update

- 5 active chapters in Australia and 1 petitioning chapter
- 3 active chapters in New Zealand
- 4 chapter installations in the United States
- 1 chapter installed in Saudi Arabia

► Adaptation to COVID-19

- Fall 2020 and spring 2021
 - Live Virtual Initiations
 - Virtual Professional Sessions
- Launched the Executive Graduate Honor in January 2021
- Program for Chapter Activities
 - Added a Reaching Out Activity for a Wellness event for chapters to talk about coping with COVID-19
- Introducing the Chapter Reboot program in fall 2021



2021 MID-YEAR MEETINGS

► HIGHLIGHTS

- **Keynote speakers:**
 - Emelissa Baluyot, Amazon
 - Michael Whitmire, FloQast
 - Jeffrey Thompson, IMA
- **1,310** attendees total
 - 4 virtual meetings
 - Friday, Feb. 19
 - Friday, March 5
 - Friday, March 19
 - Wednesday, April 7 (Oceania)
- **117** total presentations for Best Practices (Southeast: 21, Northwest: 8, Atlantic Coast: 19, Midwest: 15, Western: 9, Rocky Mountain: 4, Southwest: 18, Missouri Valley: 5, Oceania: 18)
- **63** total Chapter Operations presentations (Atlantic Coast: 15, Midwest: 9, Missouri Valley 2, Northwest 5, Oceania: 1, Rocky Mountain: 1, Southeast: 18, Southwest: 6, Western: 6)



2021 VIRTUAL ANNUAL MEETING

► Virtual

► **Thursday, Aug. 5–Friday, Aug. 6, 2021**

► HIGHLIGHTS

- **861** attendees total
- **24** presentations for Best Practices
- **Chapter Operations and Alumni Panel** were interactive sessions during the Annual Meeting.
- **46** participants for Project Run With It (PRWI)



► For the 2021 Annual Meeting CSD Project

- 464 volunteers
- 61 chapters donated
- 56,878 school supplies
- 4,254 children

► Donations made:

- Over 6,829 books to the children at Georgetown East Elementary School in Annapolis, MD, and The Boys & Girls Clubs of Southern Nevada
- 200 backpacks
- 200 notes of Inspiration
- 1,500 sling Bags
- 15,488 Pack Shack Meals to Three Square Food Bank in Las Vegas
- 168 Pack Shack Be Neighborly Provision Boxes to the food pantries at University of Nevada Las Vegas and University of Nevada Reno

Beta Alpha Psi Community Service Day

Sponsored by KPMG U.S. Foundation, Inc., KPMG University Talent Acquisition and Beta Alpha Psi

139,168 Pack Shack Meals	93,585 School Supplies	Over 40,000 Books and Resources	19,416 Children	6,957 Volunteers
3,800 Notes of Inspiration	1,800 Backpacks	168 Pack Shack Be Neighborly Provision Boxes	151 Stars of Hope	61 Literacy Fair Locations
2013 – Anaheim, California 2014 – Atlanta, Georgia 2015 – Milwaukee, Wisconsin	2016 – Baltimore, Maryland 2017 – Anaheim, California 2018 – Washington, DC	2019 – Chicago, IL 2020 – Orlando, FL (Virtual) 2021 – Las Vegas, NV (Virtual)	5 Campus Cleanup Locations	2 Murals

OUTSTANDING DEAN

The Outstanding Dean award recognizes deans for their significant contribution in faculty support and/or financial support to helping achieve the goals and objectives of their university's Beta Alpha Psi chapter. Without the deans' support, many Beta Alpha Psi chapters would be underfunded and not able to deliver the types of programs and activities needed to provide an adequate Beta Alpha Psi experience.

Debra Salvucci

Founding Dean of the Meehan
School of Business, Stonehill College

► A CPA with an undergraduate accounting degree from the Carroll School of Management at Boston College, a master's degree in taxation from Bentley University and coursework (through successful completion of comprehensive examinations) in Boston College's Higher Education Ph.D. program, Deb Salvucci joined Stonehill in 1985. A focus on student success has been a hallmark of her career. In 1994, she won the College's Louise F. Hegarty Award for Excellence in Teaching. Her role as a teacher and a mentor was also recognized in 2011, when the Massachusetts Society of CPAs named her Outstanding Educator of the Year. In 2013, she received the Outstanding Faculty Service Award in recognition of her distinguished contributions to the college in areas such as strategic planning, governance and institutional accreditation.

In 2007, she became chair of the Business Administration Department and, in that role, guided the department through the complex process to meet the rigorous standards for accreditation set forth by the Association to Advance Collegiate Schools of Business (AACSB). The hard work of the department combined with her strategic leadership culminated in Stonehill's successful initial AACSB accreditation in 2011.

Deb serves on the Boards of South Shore Stars and The Boston College Council for Women and AACSB's Initial Accreditation Committee.



“As a long-term teacher, mentor and higher education administrative leader with a focus on student success, this honor is an important recognition of what we do at Stonehill to enhance the academic and professional opportunities for our students. We have a long tradition of our alumni succeeding in their professional careers. Our work with the Mu Omega chapter is an integral part of that process, and I am so proud of what our students and alumni are achieving.”

— Debra Salvucci

BUSINESS INFORMATION PROFESSIONAL OF THE YEAR

- ▶ Sponsored by IMA since 2011
- ▶ The Business Information Professional of the Year award recognizes three individuals who make significant contributions to business information professions.
- ▶ This year's winners have made substantial contributions in education, industry and government, and professional services.

EDUCATION

Dr. Mark Ross

JC Holland Professor and Chair,
Department of Accounting —
Western Kentucky University

Nominated by — Western Kentucky
University, Eta Omicron chapter

- ▶ Mark Ross spent three years as a part-time university math instructor/volunteer coach, one year as a public school math teacher/coach, six years as programmer/controller for oil and gas training and trading companies, four years as a Ph.D. student and the past 27 years on accounting faculty at WKU.

While at WKU, he received numerous Beta Gamma Sigma “teacher of the year” awards and was the initial Beta Alpha Psi “teacher of the year.” It’s these awards that carry the most value to him as they are decided by the students. He teaches intermediate and advanced accounting.

Have served 20 years as treasurer for youth baseball leagues and travel teams, as well as a high school booster club. Five of six children have graduated from WKU, with a sixth finishing their freshman year.



“Thanks so much to everyone involved for this award. I was very honored to be nominated and quite shocked to be named the winner. This honor speaks volumes to the dedication and involvement of the Eta Omicron Chapter at WKU as they are the ones that do all the work. It also marks the second year our chapter has had an award winner [2020 professional services — Ann Puckett]. It’s recognition from student-initiated sources that carry the greatest satisfaction, and I look forward to having a continued involvement with BAP.”

— Dr. Mark Ross



"I am honored to be recognized by Beta Alpha Psi as their 2021 Business Professional of the Year and humbled to represent my alma mater, Murray State University, in this meaningful way. The education I received at Murray State provided me with an outstanding foundation for my more than 30-year career in Nashville and the health care industry, and I am privileged to remain involved today as a trustee of the MSU Foundation. I am thankful for this distinguished honor and I look forward to watching the next generation of business leaders begin their careers and guide us into a bright future."

— David Dill

INDUSTRY AND GOVERNMENT

David Dill

President and Chief Executive Officer,
LifePoint Health

Nominated by — Murray State University,
Epsilon Nu chapter

▶ David Dill is president and chief executive officer of LifePoint Health. In this role, he is responsible for the development and oversight of LifePoint's strategic priorities and organizational growth, advancing the company's mission and strengthening its culture enterprise-wide. He joined LifePoint in 2007 as executive vice president and chief financial officer before serving in his most recent role as president and chief operating officer from 2009 to 2018. Under his leadership, the company has expanded its footprint to 87 hospital campuses, with revenue growing from \$3 billion in 2009 to more than \$8 billion in 2018, and enhanced its focus on quality and patient safety.

Before joining LifePoint, David was executive vice president of Fresenius Medical Care North America and chief executive officer in the East Division of Fresenius Medical Care Services, a wholly owned subsidiary of Fresenius Medical Care AG & Co. KGaA.

David is a former chairman of the board for the Federation of American Hospitals (FAH) and serves as a member of the FAH's board and Executive Committee. He is also vice-chair of the board of directors for the Nashville Health Care Council, serves as a director on the boards of R1 RCM and the American Heart Association's Greater Southeast Affiliate and is a member of the board of trustees for the Murray State University Foundation.

PROFESSIONAL SERVICES

Colleen Dowd

Risk Assurance Partner, PwC

Nominated by — University of Massachusetts Amherst, Delta Nu chapter

- ▶ Colleen Dowd is a partner in PwC's Digital Assurance & Transparency practice and has over 20 years of experience serving a wide array of clients primarily in the asset management and insurance sectors. Colleen's focus has been on performing external and internal audits, executing third-party assurance attestation engagements and advising clients through accounting and record-keeping system implementations.

Colleen's experience also includes evaluating business and information technology processes to assist her clients in improving the efficiency of operations, reducing costs and strengthening regulatory compliance in the first, second and third lines of defense. In addition to her client service responsibilities, Colleen is the Diversity Partner Champion for her team where she is responsible for driving diversity and inclusion from a staffing, talent management, and unique people experience.

Colleen is a graduate of the University of Massachusetts at Amherst (B.S. Accounting and Information Systems) and is still active on campus in talent recruiting as well as serving on the Isenberg Accounting Advisory Council. She is a Board Member for Girls Inc. of Worcester, where she is a member of the board's Diversity, Inclusion, and Equity Committee, and the Boston Chamber of Commerce's Women's Network Advisory Board. Colleen lives in Westborough with her husband Paul and three children, Declan, Delaney and Charleigh.



"I am so honored to represent UMass as the recipient of this year's BOPY Award for professional services. I have incredible memories of my time at Isenberg and as a member of Beta Alpha Psi and have really enjoyed staying connected to the members as a PwC professional. Thank you to the Delta Nu Chapter at the Isenberg School of Management, UMass Amherst for nominating me for this award."

— Colleen Dowd

MEDAL OF INSPIRATION

- ▶ Sponsored by AICPA since 2008
- ▶ The Medal of Inspiration Award is bestowed upon a student who has experienced extreme hardships in their life and has demonstrated an unusually high level of success despite that adversity.
- ▶ Winner: **Fadi Shamoun**, Petitioning Chapter, Swinburne University of Technology

In 2013, as a young high school student in Iraq, Fadi dreamed of becoming an accountant when he grew up. Unfortunately, political unrest and instability in many areas of Iraq forced Fadi and his family to move to Turkey in hopes of a safer environment. With little resources, Fadi was not able to attend or finish high school in Turkey. He made the difficult choice to leave his family and friends and moved to Australia. With the limited financial resources, Fadi pursued remedial courses and obtained a certificate in accounting.

However, Fadi knew that to seek employment with a professional accounting firm, he needed to pursue a bachelor's degree in business. Despite financial struggles and not being a native English speaker, Fadi applied for and received several awards and scholarships to enroll in a three-year university to pursue his bachelor's degree.

Through the process, Fadi remained dedicated to his goals and overcame the adversity of poverty, depression and cultural barriers. The student awards and scholarships he received were a lifeline to the future he had always dreamed of.



"It was one of the best moments I have ever felt throughout my life when I realized my application was approved, as I put so much effort into it and my hard work has paid off. When I first saw the email, I was in disbelief. The first thing I did was to run and tell my parents and they were very proud of me. I feel very happy with this award as I found out that it helps with the cost of study and encourages me to work hard."

— Fadi Shamoun

PRESIDENT'S AWARD

Beth Fulk

CMP, Lead Manager, Meetings and Events, AICPA

- ▶ “As President of Beta Alpha Psi, I have the privilege to single out a person who has an important impact on BAP. My choice is Beth Fulk, Lead Manager, Meetings and Events, AICPA. Beth has helped BAP in so many ways over the last year and a half. First, she was able to renegotiate all our conference hotel commitments so that the organization was not hurt financially. More importantly, she became an agile leader in converting to virtual meetings. She searched for the best vehicles for us to use and patiently trained us in their use. Her calm demeanor and can-do attitude was an example to all of us.”

— Rita Grant



“Thank you so much for awarding me the 2021 Beta Alpha Psi President’s Award. I have been a part of planning BAP Regional and Annual Meetings for six years now, and it means so much to me to receive an award from an organization I have enjoyed being a part of. Thank you, Beta Alpha Psi!”

— Beth Fulk

OUTSTANDING FACULTY ADVISOR AWARD

- ▶ Sponsored by RSM US LLP since 2007
- ▶ One of the most vital elements in the success of a Beta Alpha Psi chapter is the Faculty Advisor. Through countless hours of commitment, individual faculty advisors make substantial contributions to the professional growth and development of Beta Alpha Psi students.
- ▶ Beta Alpha Psi and RSM US LLP are pleased to recognize four outstanding faculty advisors who go above and beyond the requirements of a faculty advisor. Honorees receive a plaque and a cash award of \$5,000 in recognition of their service to Beta Alpha Psi.

Anna Bedford

University of Technology Sydney,
Upsilon Tau Sigma chapter

Anna Bedford is a Senior Lecturer in the Accounting Discipline Group and Faculty Advisor for Beta Alpha Psi. Her research focuses on corporate governance, mergers and acquisitions and innovation. She has published in several peer-reviewed journals and her research has been widely circulated in major media publications such as the SMH, AFR and Boss Magazine. In 2012, she was a visiting scholar at Massachusetts Institute of Technology, New York University and Bocconi University.

Anna lectures in both undergraduate and postgraduate subjects in corporate business acquisitions, financial reporting and introductory financial and management accounting. She has consistently been voted in the top 20 lecturers lists. She has previously received the Postgraduate Business Prize for Excellence in Teaching Award (2018 and 2019), the Undergraduate Business Prize for Excellence in Teaching Award (2011 and 2019) and a Teaching Citation in 2018.

In addition to her research and teaching, Anna is passionate about widening participation and increasing student engagement, which she addresses in her role at UTS BAP, Social Justice in Business and ActivateUTS.



"Thank you BAP and RSM for recognizing my passion and commitment to my chapter. I am extremely grateful to my students who nominated me for the award this year. It is their hard work, talent and commitment to BAP that drive our success. I love them all to bits."

– Anna Bedford

Jenny Teruya

University of Hawaii at Manoa,
Delta Theta chapter

Jenny Teruya is an Associate Professor of Accounting at University of Hawaii at Manoa, teaching financial accounting at both the undergraduate and graduate levels. She has her BBA and MAcc from the University of Hawaii at Manoa where she first joined BAP and became their chapter's president. After working as an auditor in a Big Four accounting firm and teaching at Hawaii Pacific University, Jenny pursued her Ph.D. from the University of Arizona. She has received numerous teaching awards including the Chancellor's Citation for Meritorious Teaching. In addition to serving as the Beta Alpha Psi faculty advisor for 17 years, Jenny serves as the faculty director for the Master of Accounting Program.



"I'd like to thank RSM for supporting faculty advisors through your sponsorship of this award. When I was asked to be the advisor for the Delta Theta Chapter over 20 years ago, I enthusiastically accepted, never expecting it to be such a rewarding experience. I've had the opportunity to watch students develop into leaders, not only in the chapter, but in their professional careers. I am truly honored to be the recipient of the Outstanding Faculty Advisor Award."

– Jenny Teruya

OUTSTANDING FACULTY ADVISOR AWARD

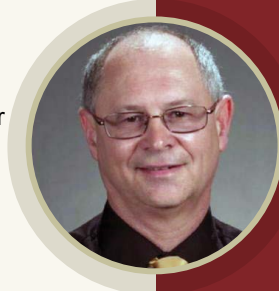
George Durler

Emporia State University, Lambda Psi chapter

Dr. M. George Durler first joined Beta Alpha Psi as a charter student member at Kansas State University. He is also a charter faculty member of the Alpha Lambda chapter of Beta Alpha Psi at Emporia State University. Dr. Durler is an Emeritus Professor of Accounting in the School of Business at Emporia State (ESU). Dr. Durler earned his Ph.D. in Accounting from Louisiana State University and has a Bachelor of Science in Business Administration and a Masters of Accountancy from Kansas State University. Dr. Durler is a Certified Public Accountant.

Dr. Durler is the father of two adult children. He is active in the Emporia community as a member of the Flint Hills Optimist Club, has served on various committees for Unified School District 253, and has held various officer positions with the Parent/Teacher Organizations of William Allen White and Lowther Intermediate schools. He has served as a member of the Board for the Kansas Society of CPAs, the Kansas Board of Accountancy Educators Advisory Council, the Kansas Department of Education Business Finance Pathway Advisory Council and the Emporia High School Business Finance Pathway Advisory Council.

Dr. Durler was instrumental in founding a chapter of BAP at ESU and served as its advisor during the petitioning process in 2005 through installation, and either as advisor or co-advisor until his retirement in 2021. Some of his most cherished memories are from his interactions with BAP students on campus, at regional meetings, and annual meetings.



“I am greatly honored to receive this award. Perhaps my most fulfilling service as a college professor has been as an advisor for Beta Alpha Psi. Assisting students who mature into financial professionals has been personally rewarding for me.”

– George Durler

David Emerson

Salisbury University, Iota Pi chapter

Dr. David Emerson received his Ph.D. in Accounting from Virginia Commonwealth University in 2012, and has been teaching at Salisbury University on Maryland's Eastern Shore ever since. He became a licensed CPA concurrently with his doctoral studies because he recognized the importance of integrating theory and practice. Before entering academia, he spent several years in the military followed by more than 20 years as one of three owners of a small wholesale/retail/manufacturing firm in the Finger Lakes region of upstate New York. He lives with his wife (and de facto co-advisor) Catherine in Delmar, MD.



“Dr. Martin Luther King once said that ‘Intelligence plus character — that is the goal of true education.’ In my role as Faculty Advisor for Beta Alpha Psi, it is an honor and privilege to play a role in mentoring my students who are the best of the best, and all individuals of great intelligence and exemplary character. They give me hope for the future.”

– David Emerson

GOLD CHALLENGE

- ▶ Sponsored by KPMG LLP and the KPMG Foundation since 2009
- ▶ Beta Alpha Psi recognizes that many chapters often go above and beyond what is required to become a Superior Chapter. To reward these chapters, the Gold Challenge competition provides an annual award of \$2,500 to up to 10 chapters.
- ▶ The Gold chapter status is the highest award level a chapter can receive. Only a limited number of chapters can be awarded the Gold chapter status within one academic year. The award is given to chapters that continually demonstrate and exemplify the highest values of Beta Alpha Psi: leadership, scholastic success, lifelong learning and development, service and ethical behavior.
- ▶ Eligible chapters are required to submit a seven-minute video presentation that explains and/or demonstrates why their chapter deserves the KPMG Gold Challenge award.

WINNERS

University of Arkansas	Alpha Iota Chapter
Bradley University	Zeta Lambda Chapter
The University of Sydney	Lambda Omega Chapter
Monash University	Xi Epsilon Chapter
University of Technology Sydney	Upsilon Tau Sigma Chapter
University of Alabama at Birmingham	Delta Chi Chapter
Florida International University	Eta Iota Chapter
Seattle University	Delta Eta Chapter
University of South Florida	Delta Gamma Chapter
University of Nevada Las Vegas	Theta Omicron Chapter

BEST PRACTICES

- ▶ Sponsored by Deloitte since 2001
- ▶ The Best Practices competitions give members a chance to present their expertise on one of the topics for the year.
- ▶ Each of the winning teams from the nine regional meetings competed virtually for their winning topic.
- ▶ Deloitte announced the Mid-Year Meeting winners March 30, 2021. There were three award categories (Invest in Yourself, Invest in Your Chapter and Invest in Your Community) and nine regions. Not all regions had first, second and third place winners for each category.

▶ MID-YEAR MEETING WINNERS

(based on category)

INVEST IN YOURSELF

First place

Atlantic Coast	University of Massachusetts Amherst
Midwest	Cleveland State University
Missouri Valley	University of Iowa
Northwest	Seattle University
Oceania	University of Technology Sydney
Rocky Mountain	Utah State University
Southeast	University of Alabama at Birmingham
Southwest	University of Arkansas
Western	University of Nevada Las Vegas

Second place

Atlantic Coast	University at Buffalo
Midwest	University of Wisconsin Oshkosh
Missouri Valley	Washington University in St. Louis
Oceania	Monash University
Southeast	University of Tennessee Knoxville
Southwest	University of Central Arkansas
Western	Arizona State University

Third place

Atlantic Coast	Manhattan College
Midwest	Bradley University
Oceania	The University of Auckland
Southeast	Florida Southern College
Southwest	University of Texas at El Paso
Western	University of Southern California

INVEST IN YOUR CHAPTER

First place

Atlantic Coast	St. John's University
Midwest	Case Western Reserve University
Missouri Valley	University of Iowa
Northwest	Gonzaga University
Oceania	University of Technology Sydney
Southeast	University of Tampa
Southwest	University of Arkansas at Little Rock
Western	University of Hawaii Manoa

Second place

Atlantic Coast	Old Dominion University
Midwest	University of Wisconsin Oshkosh
Northwest	Boise State University
Oceania	Swinburne University of Technology
Southeast	University of North Carolina at Charlotte
Southwest	Oklahoma State University
Western	University of Nevada Las Vegas

Third place

Atlantic Coast	The Pennsylvania State University
Northwest	Seattle University
Oceania	University of Melbourne
Southeast	Florida International University
Southwest	University of Arkansas

INVEST IN YOUR COMMUNITY

First place

Atlantic Coast	University at Buffalo
Midwest	Cleveland State University
Missouri Valley	University of Iowa
Northwest	University of Idaho
Oceania	The University of Auckland
Rocky Mountain	Utah Valley University
Southeast	Middle Tennessee State University
Southwest	University of North Texas
Western	San Diego State University

Second place

Atlantic Coast	Ithaca College
Midwest	Western Illinois University
Missouri Valley	Iowa State University
Northwest	University of Washington Bothell
Oceania	University of Technology Sydney
Rocky Mountain	Colorado State University
Southeast	The Citadel
Southwest	University of Arkansas
Western	University of Nevada Las Vegas

Third place

Atlantic Coast	University of Massachusetts Amherst
Midwest	Kent State University
Northwest	Seattle University
Oceania	Monash University
Rocky Mountain	University of Utah
Southeast	Appalachian State University
Southwest	University of Texas at Tyler
Western	University of Hawaii at Manoa

ANNUAL MEETING WINNERS

INVEST IN YOURSELF

First place	University of Technology Sydney, Upsilon Tau Sigma Chapter
Second place	Cleveland State University, Delta Psi Chapter
Third place	University of Nevada Las Vegas, Theta Omicron Chapter

INVEST IN YOUR CHAPTER

First place	University of Technology Sydney, Upsilon Tau Sigma Chapter
Second place	The University of Tampa, Lambda Beta Chapter
Third place	University of Hawaii at Manoa, Delta Theta Chapter

INVEST IN YOUR COMMUNITY

First place	University at Buffalo, Zeta Theta Chapter
Second place	Cleveland State University, Delta Psi Chapter
Third place	Middle Tennessee State University, Zeta Gamma Chapter

PROJECT RUN WITH IT

- ▶ Sponsored by Moss Adams LLP since 2008
- ▶ Project Run With It involved **46** Beta Alpha Psi chapter members working together to develop solutions to real-life business problems of an actual not-for-profit (NFP) organization.
- ▶ The Volunteer Center, a nonprofit organization on the north side of the metropolitan Chicago area, agreed to participate and two consulting cases were developed to address their business issues.
- ▶ The students received preliminary information and then participated in a virtual Q&A with The Volunteer Center. Afterwards, the students worked in virtual teams to develop a formal presentation showcasing their solution to the business issues The Volunteer Center presented in their Request for Proposal consulting services.
- ▶ Panels of judges including two representatives from The Volunteer Center, one professional partner from sponsor, Moss Adams, and one faculty advisor. The judges reviewed the video presentation and selected the winning teams.
- ▶ The Volunteer Center received a donation of \$2,500 from the Moss Adams Foundation and each student on the winning teams received \$1,000 for their Beta Alpha Psi chapter along with a commemorative plaque.

WINNERS:

TEAM A-4

Elizabeth Howard	University of Nebraska at Omaha
Madison Hysell	University of Texas at Tyler
Austin Lai	The George Washington University
Christian Tinsley	Georgia Southern University

TEAM B-3

Jena Hagen	Iowa State University
Yesha Shah	Valdosta State University
Gabriella Young	Loyola University Maryland

PARTICIPANTS:

TEAM A-1

Margaret Kehoe	Bentley University
Merilee Newman	University of North Carolina at Greensboro
Adam Thomas	Ohio University
Angel Zhao	The University of Sydney

TEAM A-2

Landen Long	Ohio Northern University
Stephanie (Stevie) McGregor	University of Melbourne
James Pentikis	Stonehill College
Aleigha Smith	University of Arkansas at Little Rock

TEAM A-3

Anna Gonzalez	Valdosta State University
Dilynn Kessler	University at Buffalo
Maggie O'Brien	Southeast Missouri State University
Katie Weller	University of Arkansas

TEAM A-5

Abaigael Belcher	Elon University
Amy Dobbins	University of Idaho
Amy Gurley	Western Illinois University
Elizabeth Vuong	San Francisco State University

PROJECT RUN WITH IT (CONTINUED)

TEAM A-6

Naya Davis	North Carolina A&T State University
Anahi Huante Jaimes	Seattle University
Serene Townsell	University of Nevada Reno

TEAM B-1

Mariah Belletti	University of Massachusetts Amherst
Kenneth Bounds	Sam Houston State University
Devan Harmych	Bowling Green State University
Chang-Song Wang	University of Technology Sydney

TEAM B-2

Anna Gaglio	St. John's University
Victor Jaures	University of South Florida St. Petersburg
Benji Pena	University of Central Arkansas
Ashley Rieder	University of Wisconsin Oshkosh

TEAM B-4

Megan Lakey	University of North Texas
Allie Lowe	Washington State University
Ashlee Smith	Marshall University
Wendy Zheng	Nicholls State University

TEAM B-5

Anh Dang	Case Western Reserve University
Haley Duffield	University of South Dakota
AnnaGrace Horton	University of North Carolina at Charlotte
Renee Van	California State University Sacramento

TEAM B-6

Isabelle Boomhower	Clemson University
Minh Hanh Nguyen	Monash University
Kalina Tatareva	University of Nevada Las Vegas
Cailin Bary	University of Idaho

EY INCLUSIVE LEADERSHIP AWARDS

- ▶ Sponsored by EY since 2007
- ▶ An inclusive work environment that values and leverages the unique differences of a diverse team is critical for the future success of the global business community. The leadership at EY fully understands the importance of an inclusive environment that values the contributions of everyone. The firm believes that a key element of effective teaming is the diversity of team members of different backgrounds and perspectives. Highly effective leaders are those who are experienced in leading diverse teams.
- ▶ EY also believes that it is important for future leaders of the business community to have a great appreciation and understanding of how to be a successful team in a diverse and inclusive environment. EY also believes that when differences are celebrated, talented people from all backgrounds have the chance to develop, advance and make more meaningful contributions to our clients and our culture.
- ▶ Through the EY Inclusive Leadership award, we asked Beta Alpha Psi members — are you ready to help us build a better working world by leveraging the power of diverse perspectives?
- ▶ 4 Final Round award winners, deadline for submissions was moved to Oct. 15, 2020, due to COVID-19.

First place Case Western Reserve University, Pi Chapter

Second place The University of Melbourne, Xi Lambda Chapter and Monash University,
Xi Epsilon Chapter

Third place..... Western Kentucky University, Eta Omicron Chapter

Third place..... The University of Tampa, Lambda Beta Chapter

GRANT THORNTON ETHICS AWARDS [PAUSED FOR 2020–21]

- ▶ Sponsored by Grant Thornton LLP since 2010
- ▶ The purpose of this award is to help encourage ethical behavior throughout the accounting, finance and information technology professions. The business world has experienced the ethical failures of many individuals and organizations in the profession, and these actions have had detrimental and lasting effects on the economy and individual investors and have damaged the reputation of these professions. It is a core value of Beta Alpha Psi to encourage ethical behavior.
- ▶ One way to encourage this behavior is to examine difficult situations demanding ethical responses and by recognizing the resulting exemplary ethical behavior by individuals and/or organizations in the professions, government, business, academia and not-for-profits.
- ▶ Grant Thornton recognized 11 chapters that reached semifinalist status in this year's competition. Grant Thornton awarded \$1,000 per selection to fund the project outlined in their initial proposals. Five final round winners received a total of \$8,250 in 2021.



► 2021 VITA Participants

- Sponsored by IRS
- The **Volunteer Income Tax Assistance (VITA) Program** offers free tax help to people who make \$50,000 or less and need assistance in preparing their own tax returns.
- This is an excellent opportunity for Beta Alpha Psi chapters to gain exposure on campus and in the community, while also gaining valuable practical experience in income tax preparation.

► 2021 VITA Participants

Boise State University	Zeta Psi Chapter
Brigham Young University	Gamma Alpha Chapter
Case Western Reserve University	Pi Chapter
Creighton University	Alpha Nu Chapter
Indiana University	Beta Alpha Chapter
Middle Tennessee State University	Zeta Gamma Chapter
Murray State University	Epsilon Nu Chapter
Ohio Northern University	Mu Delta Chapter
Oregon State University	Epsilon Chapter
Portland State University	Epsilon Alpha Chapter
San Francisco State University	Beta Chi Chapter
SUNY Oswego	Lambda Zeta Chapter
The University of Texas at Tyler	Tyler, Mu Kappa Chapter
Truman State University	Kappa Nu Chapter
University of Central Arkansas	Theta Lambda Chapter
University of North Georgia	Nu Gamma Chapter
Valdosta State University	Mu Zeta Chapter

AWARD CHAPTERS

To qualify as superior, each chapter must report a designated amount of Reaching Out Activities (ROA) and each chapter member/candidate must have a certain number of professional and service hours, as outlined in the Program for Chapter Activities. Each Superior chapter receives a monetary award of \$500 from KPMG LLP and the KPMG Foundation.

SUPERIOR WINNERS

Appalachian State University	Manhattan College	University at Buffalo
Auburn University	Marshall University	University of Central Arkansas
Bentley University	Middle Tennessee State University	University of Central Florida
Boise State University	Mississippi State University	University of Connecticut
Bowling Green State University	Missouri State University	University of Florida
Brigham Young University	Murray State University	University of Hawaii at Manoa
California State University East Bay	North Carolina A&T State University	University of Idaho
California State University Fresno	Northern Arizona University	University of Illinois
California State University Long Beach	Ohio University	University of Iowa
California State University Northridge	Oregon State University	University of Kentucky
Case Western Reserve University	Quinnipiac University	University of Mississippi
Clemson University	Rutgers University New Brunswick	University of Missouri St. Louis
Cleveland State University	Salisbury University	University of Nebraska at Omaha
Colorado State University	Sam Houston State University	University of Nevada Reno
Deakin University	San Francisco State University	University of North Alabama
Eastern Illinois University	Southeast Missouri State University	University of North Carolina at Charlotte
Elon University	Southern Illinois University at Carbondale	University of North Carolina at Greensboro
Fairfield University	St. John's University Staten Island	University of North Florida
Florida Atlantic University	Stonehill College	University of North Georgia
Florida Gulf Coast University	SUNY Oswego	University of Northern Colorado
Florida State University	Temple University	University of San Diego
Georgia Southern University	Texas State University	University of South Carolina Upstate
Grand Valley State University	The University of Akron	University of South Dakota
Hofstra University	The University of Alabama	University of South Florida
Jacksonville State University	The University of Melbourne	St. Petersburg
Kennesaw State University	The University of Memphis	University of Southern California
Kent State University	The University of Southern Mississippi	University of Southern Indiana
Lamar University	The University of Tampa	University of Tennessee at Knoxville
Loyola University Maryland	Truman State University	

AWARD CHAPTERS (CONTINUED)

University of Texas at El Paso

University of Texas at Tyler

University of Utah

University of Washington

University of Washington Bothell

University of West Florida

University of Wisconsin Oshkosh

Utah State University

Valdosta State University

Washington State University

Washington State University Vancouver

West Chester University

Western Illinois University

Western Kentucky University

Youngstown State University

DISTINGUISHED WINNERS

Arizona State University

Auburn University at Montgomery

California State University Fullerton

Central Connecticut State University

Central Michigan University

Creighton University

Emporia State University

Florida Southern College

Gonzaga University

Iowa State University

Ithaca College

Long Island University Post

Louisiana State University

Marquette University

Minnesota State University Mankato

Nicholls State University

Oklahoma State University

Pace University

Robert Morris University

Rowan University

San Diego State University

Siena College

Tennessee Tech University

The Pennsylvania State University

University of Arkansas at Little Rock

University of Arkansas Fort Smith

University of Georgia

University of Louisiana at Monroe

University of Massachusetts Dartmouth

University of Michigan Dearborn

University of Michigan Flint

University of Missouri

University of Montana

University of North Texas

University of Notre Dame

University of South Alabama

University of Tennessee at Chattanooga

University of Wisconsin Milwaukee

University of Wisconsin Whitewater

Washington University in St. Louis

Weber State University

Western Michigan University

Western Washington University

Wichita State University

AWARD SPONSORS RECOGNITION FY21

Competitions and awards are at the center of the Beta Alpha Psi member experience, as they provide an avenue for students to develop professionally, practice ethical and social responsibility, and broaden their networks. We could not provide this experience without support, involvement and enthusiasm of our sponsoring professional partners.



- ▶ KPMG Foundation awarded \$25,000 to Gold status chapters, \$87,000 to Superior status chapters, and donated \$45,000 for the Annual Meeting Community Service Day.



- ▶ Deloitte awarded \$30,000 to chapters that participated in the Best Practices competition on a regional and international level.



- ▶ Moss Adams LLP awarded \$10,000 to the Project Run With It winning teams and donated \$1,134.78 to the competition.



- ▶ RSM US LLP awarded \$20,000 to the Outstanding Faculty Advisor award recipients.



- ▶ Due to the ongoing COVID-19 crisis, the Ethics competition was suspended for 2020–21.



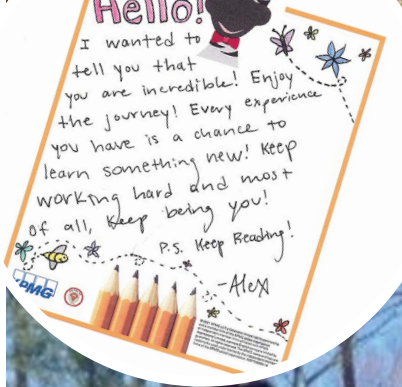
- ▶ EY awarded \$8,250 to chapters that participated in the Inclusive Leadership competition.



- ▶ The IMA awarded \$6,000 to the Business Information Professional of the Year award recipients.



- ▶ The AICPA awarded \$5,000 to the Medal of Inspiration award recipient.





BETA ALPHA PSI

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