

Petitioning Application for Establishment of a Beta Alpha Psi Chapter Charter

Make sure to:

1. Complete the full petitioning application.
2. Save as a PDF document.
3. Upload to www.bap.org/startachapter .

PETITION

Check each of the following indicating that these documents are completed and attached to this petition:

Checklist	Completed
I. Statement of Objectives	<input type="checkbox"/>
II. Planned Activities for Two Semesters	<input type="checkbox"/>
III. Proposed Chapter Bylaws	<input type="checkbox"/>
IV. Administrative and Faculty Support	<input type="checkbox"/>
a. Statement from Faculty Advisor	<input type="checkbox"/>
b. Letter of Support from Business School Dean	<input type="checkbox"/>
c. Letter of Support from Department Chair	<input type="checkbox"/>
V. Accounting, Finance and Business Analytics or Digital Technology Majors	<input type="checkbox"/>

I. STATEMENT OF OBJECTIVES - SAMPLE

Please complete the Statement of Objectives for your chapter.

The XXX University petitioning chapter of Beta Alpha Psi adopts the mission statements and objectives of XXX University and the School of Business, as well as the objectives of Beta Alpha Psi. XXX University creates a collegial atmosphere that fosters freedom of inquiry and expression, increases awareness of cultural diversity, provides broad learning opportunities, encourages flexibility and innovation, and fosters student development in and out of class. XXX University also encourages life-long learning and provides leadership in selected areas of distinction. The mission of the School of Business is to prepare students for successful professional careers by offering high-quality business programs in a student-centered learning environment, and as a teaching institution, the School seeks to excel in teaching, enriched by scholarship and service.

The objectives of the XXX School of Business are:

1. To develop and deliver high-quality undergraduate business programs built upon an academic foundation in arts and sciences, and strategically-focused graduate business programs.
2. To provide a culture of intellectual inquiry that promotes effective learning.
3. To educate students with knowledge and skills necessary for successful entry to and advancement in their professional careers.
4. To promote effective interaction between the School and community.

The adoption of these objectives is consistent with the stated Beta Alpha Psi objectives. The primary objective of Beta Alpha Psi is to encourage and give recognition to scholastic and professional excellence in the business information field by promoting the study and practice of accounting, finance, and Business Analytics or Digital Technology. This is accomplished by providing opportunities for self-development, service and association among members and practicing professionals, and encouraging a sense of ethical, social, and public responsibility.

II. PLAN OF ACTIVITIES - SAMPLE (Assumes a Fall Semester/Quarter 1 202X petition)

Activity	Month/Year	How Requirement Was Met
Professional Activities:		
Professional Meeting		Meeting with speaker from a CPA firm about time management
Professional Meeting		Virtual meeting with representative from XXX who spoke about XXX
Professional Meeting		
Professional Meeting		
Professional Meeting		
Professional Meeting		
Reaching Out Activities:		
Annual Meeting Attendance		Chapter Advisor and at least one student attended or may attend meeting
Annual Meeting Community Service Day Attendance		Participation in Community Service Day at Annual Meeting
Mid-Year Meeting Attendance		Mid-Year Meeting Attendance
Second Recognition Ceremony		Recognition of candidates from Spring 202X meeting all requirements.
Finance and IS Interaction		Activity that includes Finance and Business Analytics or Digital Technology
Promoting Careers in Accounting, Finance, Business Analytics or Digital Technology		Career Fair for three majors
Promoting Careers in Accounting, Finance, Business Analytics or Digital Technology		Visited local high-school and presented on careers in financial information to encourage majors
Service Activities:		
Service Activity		VITA
Service Activity		Food Bank
Reporting Activities:		
Beginning of Year Report		File by October 15
Mid-Year Report		File by December 15
End of Year Report		File by June 1
Other Activities:		
Recognition Ceremony		Recognition of candidates from Fall 202X meeting all requirements.

III. PETITIONING CHAPTER BYLAWS - SAMPLE

(Note: these are sample bylaws. Your chapter may elect to have different activities than the ones identified in this sample; however, many of the provisions of these sample bylaws are based on requirements of the International Bylaws of Beta Alpha Psi.)

Beta Alpha Psi recognizes academic excellence and complements members' formal education by providing interaction among students, faculty, and professionals, and fosters lifelong growth, service, and ethical conduct.

Article 1: Name of the organization

The name of this organization shall be the Petitioning Chapter of Beta Alpha Psi at XXX University *(The Executive Office will assign the Greek name once the petitioning chapter receives board approval for installation.)*

Article 2: The objectives and purposes of the Chapter

Beta Alpha Psi is an honorary and professional organization for students of accountancy, finance and Business Analytics or Digital Technology. Its stated purpose includes recognition of outstanding academic achievements in the field of accounting, finance and Business Analytics or Digital Technology; promotion of the study and practice of accounting, finance and Business Analytics or Digital Technology; provision of opportunities for self-development and association among members and financial information professionals; and encouragement of a sense of ethical, social, and public responsibility. The organization seeks to develop its members' professionalism through career-oriented, social, and community activities.

Article 3: Recognized Candidatship

To be admitted as a recognized-candidate* in the organization, a student must successfully complete a semester as a candidate and attain minimum academic performance. Recognized-candidates of a petitioning chapter will become charter members once the chapter is installed.

** Note: students cannot be "members" of Beta Alpha Psi until the chapter has been installed and therefore, to distinguish candidates who have met all of the requirements of membership from those who have not, the term "recognized-candidate" is used to designate the candidates who, upon installation of the chapter, will become charter members of the chapter.*

Petitioning Chapter Candidate Requirements:

Required by BAP International Bylaws:

1. Be a matriculated undergraduate or postgraduate student with a concentration in accounting, finance, or Business Analytics or Digital Technology.
2. Completed (in addition to two years of collegiate courses), at least one upper-level course beyond the business core in the appropriate major with a 3.0 average or better in all upper-level courses taken in the appropriate major.
3. Attain an overall minimum cumulative grade point average of 3.0 or (3.25 in the last 30 hours).
4. Payment of candidate fee as determined by the executive committee of the petitioning chapter. The fee includes international dues and may include an

induction banquet, and social recruiting functions.

Examples but not required by BAP International Bylaws:

5. Complete professional, service, or other requirements as dictated by the chapter.
6. Participate in a Mock Interview and Resume Critique Session.
7. Participate and attend the respective Recognition Ceremony pending faculty advisor's review and approval of academic standing.
8. Be a person of good moral character.

Recognized-candidate Expectations:

1. Attain an overall minimum cumulative grade point average of 3.0.
2. Attain a minimum cumulative grade point average of 3.0 in the appropriate major. The grade point average from your accounting, finance, or Business Analytics or Digital Technology major includes only upper level major courses.
3. Participate in petitioning chapter professional, service and other activities as organized by the executive committee.
4. Payment of annual fee as determined by the petitioning chapter executive committee. The fee covers the attendance at social and recruiting functions.

Article 4: Meetings for the conduct of business

Actions requiring a vote of the entire candidate roster will require a one week notice of meeting and agenda. Persons may not vote by proxy. Both recognized-candidates and candidates in good standing are eligible to vote. The lesser of 20% of the recognized-candidates and candidates or a quorum of the petitioning chapter representatives are required to conduct a vote. The final decision will be determined by a majority of the vote.

Actions requiring the vote of the **executive committee, consisting of the elected petitioning chapter officers and faculty advisor**, will require a 48 hour notice of meeting and agenda. Persons may not vote by proxy. An executive committee vote requires the attendance of at least 25% of the executive committee. The final decision will be determined by a majority of the votes.

Article 5: Student officers

Petitioning Chapter Officer Elections:

The term of office will begin when the officers are sworn in at the Spring Banquet and end the following spring when the next class of officers is sworn in. Exception: During the initial semester/term of the petitioning process, officers may be elected at the beginning of the term by the inaugural class of candidates or may be appointed by the faculty advisor.

Elections are to be held in the Spring Semester prior to the upcoming academic year. One meeting is to be set aside for nominations. Nominations may be made by either a recognized-candidate or a candidate of the chapter, however, only recognized-candidates may serve as officers of the chapter (except during the initial semester / term of the petition when all students are candidates). At the following meeting, nominated student will give a brief speech stating their goals, objectives, and reasons for running for office. Recognized-candidates and candidates will be given an election ballot. Each petitioning chapter recognized-candidate and candidate will cast one vote which will be

collected by the outgoing president. The president and faculty advisor will count the votes; the candidate with a majority of the votes wins. The non-elected recognized-candidate(s) will be given the option to drop down and be considered for the next office in the election sequence. The election sequence is as follows:

- President
- Vice-President/President Elect
- Reporter
- Treasurer
- Candidate Coordinator
- Vice-President Membership
- Vice-President of Special Affairs/Activities
- Vice-President of Management Business Analytics or Digital Technology

Duties and Responsibilities:

President:

1. Update the bylaws.
2. Establish the goals and activities budget for the upcoming academic year.
3. Plan and implement both the Fall and Spring Semester schedules
4. Reserve meeting room.
5. Determine desirable meeting topics.
6. Contact and correspond with speakers and presenters.
7. Maintain and update the contact list periodically.
8. Supervise and ascertain that all officers are performing their respective duties.
9. Begin, conduct, and end all meetings.

Vice-President/President-Elect:

1. Assist the president in his/her duties.
2. Coordinate the Annual Beta Alpha Psi Mock Interviews: Schedule the time and place of the event.
3. Contact and correspond with the professionals who will be conducting the interviews. Schedule participants in their respective interviewing slots.

Reporter:

1. Prepare and submit all reports as required by the BAP Executive Office including reports of petitioning chapter activities, reports of recognition ceremonies, and reports of any change in faculty advisor or student officers.
2. Maintain an updated list of graduates.

Treasurer:

1. Account for, and control, all organization financial activity.
2. Maintain all Cash Receipts:
3. Collect and deposit all cash receipts. Maintain appropriate supporting documents and Cash Receipts Journal.
4. Maintain Cash Disbursements:
5. Prepare cash disbursement and supply proper documentation. Maintain Cash Disbursement Journal.
6. Prepare financial statements.

Candidate Coordinator:

1. Monitor the progress of candidates and recognized-candidates.
2. Account for attendance at all meetings and functions.
3. Establish, with executive committee, a point system for service performed by candidates and recognized- candidates.
4. Maintain distribution on points for participation in the different organization events and activities.

Vice-President of Special Affairs/Activities:

1. Assist the President and Vice-President to arrange and coordinate functions.
2. Prepare and post a flyer at least four days before each meeting.
3. Arrange and coordinate the Fall Recognition Ceremony.

Vice-President of Technology:

1. Prepare and implement the development of the chapter website.
2. Continuously update the chapter website with current information.

The Executive Committee shall be comprised of the officers listed above and the faculty advisor and co-faculty advisor, if any.

Article 6: Committees other than the Executive Committee

Each committee will be headed by a chairperson that is appointed by the president. Participation is open to all recognized-candidates and candidates.

Article 7: Expulsion from Petitioning Chapter

Section 1. A petitioning chapter recognized-candidate (RC) may be expelled for conduct detrimental to the purposes or interests of Beta Alpha Psi. Charges of such conduct must be made in writing to the faculty advisor and signed by a RC of Beta Alpha Psi. Expulsion from recognized-candidacy would preclude this candidate from being recognized as a Charter member when the chapter is installed.

Section 2. When such charges have been made against a RC, the faculty advisor must make certain that the accused RC is given notice and an opportunity to be heard concerning the charges. Notice must be given to the accused RC by certified mail at least thirty days before the hearing, and such notice shall include: (1) a copy of the charges made against the RC; (2) the time, date, and place of the hearing; (3) an explanation of the expulsion procedures which include automatic review by the Board.

Section 3. A committee of recognized-candidates, including at least two faculty members (exclusive of the faculty advisor of Beta Alpha Psi), is to be selected by the Faculty Advisor and ranking petitioning chapter officer to investigate the charges and make a determination as to whether - the accused should be expelled. The findings should be based on a presentation of the charges by the accusing RC and the accused has the opportunity to appear and explain the actions in question.

Section 4. If expelled, the RC may request a hearing before the entire local petitioning chapter in a special meeting called for that specific purpose. A majority vote of the petitioning chapter may reverse the committee's findings.

Article 8: Removal of Officers

An officer may be discharged if he/she:

- Is not carrying out the duties of the office; or

- Is not participating as a member of the Executive Committee; or
- Does not meet the requirements for recognized-candidateship as outlined in Article 3.

An officer shall be discharged by a majority vote (excluding the faculty advisor's and co-faculty advisor's vote) of all other Executive Committee members in the case of suspensions or other disqualifying events. An officer may appeal the decision to the Executive Committee at which time the committee would take a second and final vote.

Article 9: Fiscal Year

The fiscal year of the petitioning chapter will end on April 30th.

Article 10: Authority

These bylaws shall be the principle governing document of the XXX Chapter of Beta Alpha Psi. These bylaws are subordinate to the National Constitution and Bylaws of the Beta Alpha Psi Organization. Any provision of this document that conflicts with the National Constitution and Bylaws of the Beta Alpha Psi Organization that is currently in effect will be null and void.

Article 11: Requirements for Amendment to the Bylaws

An amendment to the bylaws requires a majority of the recognized-candidates and candidates to cast an affirmative vote in order for an amendment to be passed. Amendments may be proposed by the executive committee or membership.

IV. ADMINISTRATIVE AND FACULTY SUPPORT

Statement from Faculty Advisor – SAMPLE

I, (insert name) have been appointed as the first Faculty Advisor to the **XXX** University's Beta Alpha Psi petitioning chapter. I have read the Beta Alpha Psi constitution and bylaws and will endeavor to ensure they are followed by our petitioning chapter. Further I will endeavor to attend regional and annual meetings of Beta Alpha Psi.

[Insert any additional comments you wish to add]

(Signature)

(University Address line 1)

(University Address line 2)

(University Address line 3)

(Phone)

(Email Address)

Support Letter from the Dean - SAMPLE

Date

Full Name

Dean | College of Business Administration

XXX University

Street

City, State, Zip

Dear Board of Directors, Beta Alpha Psi,

The mission and purpose of Beta Alpha Psi enhances and complements the mission of the College of Business Administration. I am confident that adding a chapter of Beta Alpha Psi at XXX University will provide our students with additional learning and professional experiences that will enhance their lifelong learning abilities.

A high level of commitment from the university is essential to assure the success of a local chapter. This will require a commitment of faculty time, energy, and resources. I support the faculty of our accounting, finance, data analytics and business analytics or digital technology department in this important endeavor.

Each year the faculty is reviewed in the areas of teaching, research, and service. Criteria for evaluation have been developed and approved by the faculty and administration. Included among these criteria is a specific provision to recognize the role of faculty serving as advisors of student organizations. The performance as faculty advisor of a chapter of Beta Alpha Psi would certainly be an important consideration in this evaluation process

I certainly look forward to the opportunity of having our program join with programs of high quality for financial information professionals. Most importantly, we recognize the benefits and opportunities Beta Alpha Psi has for our students.

Sincerely,

Dean, College of Business Administration

Support Letter from the Department Chair - SAMPLE

Date

Full Name

Department Chair | Department of Accounting

XXX University

Street

City, State, Zip

Dear Board of Directors, Beta Alpha Psi,

The Department of XXX at XXX University has voted unanimously to support a petition for a Beta Alpha Psi Charter. The purpose of Beta Alpha Psi is in direct line with the mission of this department.

As Chair of the Department of Accounting, I fully endorse this petition. However, a high level of commitment from the university is essential to assure the success of a local chapter. Therefore, XXX, Dean of the College of Business Administration has also submitted a letter acknowledging the required commitment of faculty time, energy, and resources necessary to accomplish this important objective. We both recognize and support fully the mission of Beta Alpha Psi.

Our support is further evidenced by the financial support, which the College is providing in these initial stages of organizing a chapter. The College has agreed to fund the petition fee, maintenance and installation fees, and the expenses associated with the Faculty Advisors' attendance of the annual and regional meetings.

The Accounting faculty and I believe that membership in Beta Alpha Psi is consistent with the mission of the department and will provide our students with professional and learning opportunities that will enhance their pursuits of lifelong learning.

Sincerely,

Chair, XXX Department

V. ACCOUNTING, FINANCE & BUSINESS ANALYTICS OR DIGITAL TECHNOLOGY MAJORS

A. Approximate Number of Students with a concentration in Accounting, Finance, Business Analytics or Digital Technology in past three years:

Class	Number
Freshman	
Sophomores	
Juniors	
Seniors	
Masters	
Total	

B. Approximate Number of Accounting, Finance, Business Analytics or Digital Technology graduates in past three years:

Major	Number
Masters	
Accounting	
Finance	
Business Analytics or Digital Technology	
Total	

