



Beta Alpha Psi Handbook

Table of Contents

What is Beta Alpha Psi?	2
Statement of Objectives.....	3
Constitution	4
Gamma Epsilon Chapter Bylaws	7
Gamma Epsilon Officers.....	10
Pledge Requirements.....	11
Member Requirements.....	12
Administrative Policies	13
Dept of Accounting Faculty and Staff	14

What Is Beta Alpha Psi?

Beta Alpha Psi is an honorary honors organization for accounting, finance and information systems majors. The fraternity was founded in 1919 at the University of Illinois, Urbana, with the chartering of the Alpha chapter. Since that time, the fraternity has grown and contains 250 chapters nationwide.

The University of Toledo's Gamma Epsilon Chapter was chartered in 1966. The purpose of this Chapter is best defined in Article I of the National Bylaws:

"As the premier professional business and financial information fraternity, 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."

This is the purpose of Beta Alpha Psi. This is the Mission of the Gamma Epsilon chapter. This is the purpose that you, as a member, can look forward to.

As a member of Gamma Epsilon, you have an opportunity to enhance your education, develop a professional persona, and learn to be a functional, responsible member of the profession you are about to enter. With this opportunity, however, comes responsibility. It is your responsibility to seize this opportunity so that the promise so eloquently outlined in our National Bylaws may come true for you and each of your colleagues.

Statement of Objectives

Gamma Epsilon Chapter

Beta Alpha Psi

For the Reporting Year

Ending May 31, 2010

In addition to the objectives of the national organization "to encourage and give recognition to scholastic and professional excellence in the field of accountancy," the Gamma Epsilon Chapter has established the following objectives.

1. To promote, through activities, the association of accounting students and professional accountants.
2. To promote a professional attitude among members and encourage participation of all accounting students and faculty in our professional and social activities.
3. To provide voluntary income tax assistance (VITA) to the community.
4. To provide services that will assist a variety of community groups.
5. To continue successful fund raising activities to support the organization financially.
6. To create an enlightening and engaging atmosphere through activities in order to produce camaraderie within the organization.
7. Improve national recognition and to learn new methods of improving the organization by attending national and regional events.
8. To provide opportunities and instill motivation for the self-development of our members.
9. To improve exposure to innovative accounting topics and careers through the use of the organizations' professional activities.
10. To develop new methods of recruitment that will better expose students to the organization.

Constitution

Gamma Epsilon Chapter
Beta Alpha Psi
The University of Toledo

Article I ***Name***

This organization shall be known as Gamma Epsilon Chapter of Beta Alpha Psi of the University of Toledo.

Article II ***Purposes***

The purpose of this organization shall be: to instill in its members desire for self improvement; to foster high moral and ethical standards in its members; to encourage and give recognition to scholastic and professional excellence; to cultivate a sense of responsibility and service in its members; to promote the collegiate study of accountancy; and to provide opportunities for association among its members and practicing accountants.

Article III ***Classes of Membership***

- Section 1. There shall be four classes of membership: student, faculty, honorary, and alumnus.
- Section 2. Members of the organization enrolled as students shall be designated as student members.
- Section 3. Members of the organization who are on the instructional, research, or administrative staff shall be designated as faculty members.
- Section 4. Members of the organization once classified as student or faculty members who are no longer associated with the University shall be designated as alumnus members.

Article IV ***Eligibility for Membership***

- Section 1. Degree seeking undergraduate students and non-degree Post-Baccalaureate students at institutions in which a chapter is located shall be eligible for membership after:

- (a) Declaring a concentration in accounting
- (b) Completing, in addition to two years of collegiate business and non-business courses, at least one upper level accounting course
- (c) Attaining a cumulative GPA in upper level accounting courses of at least 3.0 and meeting one of the following:
 - (1) Attaining at least a cumulative GPA of 3.0
 - (2) Achieving a rank within the top 35% of their university class
 - (3) Attaining at least a 3.25 cumulative GPA in the most recent 30 semester hours which shall be computed using all grades earned in upper level accounting classes.

Graduate students shall be eligible for membership after declaring a concentration in accounting.

Section 2. Full-time members of the accounting faculty shall be eligible for membership.

Section 3. Persons who have achieved prominence in the field of accounting and who possess those qualities that Beta Alpha Psi fosters may be elected to honorary membership.

Section 4. Candidates for initiation must be present for the initiation ceremony. Initiation "in absentia" will not be permitted.

Article V Government

Section 1. Student members shall be entitled to vote at Chapter meetings. Honorary, faculty, and alumnus members shall not be permitted to vote at Chapter meetings or hold office.

Section 2. The Chapter shall have at least a President, Vice-President, Secretary, and Treasurer. All offices shall be held by student members. The faculty advisor is a faculty member of the Chapter who is not a member of the National Council.

- Section 3. The terms of all Chapter offices shall not be longer than one year.
- Section 4. The Chapter shall adopt a fiscal year beginning on or after April 1, but no later than July 1.
- Section 5. The Chapter shall hold at least eight meetings annually, distributed throughout the academic year.
- Section 6. The offices of the Chapter shall constitute the executive committee, which will have the power to act in all matters except revision of the Chapter constitution and expulsion of members. All actions taken by the executive committee shall be reported to the members at regular intervals.
- Section 7. The annual panel of officers will be appointed by mutual agreement between the faculty advisor and the current panel of officers. If a member wants to be an officer for the following year, s/he must declare their intentions by registering for an interview. Interviews will be given by the current officers near the end of the Spring semester. There are no election procedures.
- Section 8. Chapter officers-elect shall be installed prior to, or at the last meeting of the academic year, with the retiring Chapter officers or faculty members conducting the installation.
- Section 9. The Chapter shall have the power to remove an officer for continued absence or failure to properly administer the duties of the office, and to appoint another member to fill the vacancy thus created.
- Section 10. Amendments to the constitution may come from any members. Approval of an amendment must be approved by the majority of the student members at the professional meeting. A quorum for this purpose shall be one third of membership at a regularly scheduled professional meeting and one half of the membership if a meeting is called specifically for the purpose of approving the constitution.

Bylaws

Gamma Epsilon Chapter
Beta Alpha Psi
The University of Toledo

I. Dues

The total one-time membership fee is \$135. This fee, which consists of local dues (\$60) and national dues (\$55), must be paid by the pledge by the second scheduled professional meeting of the semester. Until pledge requirements are satisfied, an additional pledge fee of \$20 or \$45 will be assessed each subsequent pledge semester, depending on reason for remaining a pledge.

II. Officer Duties

President

- Preside over meetings
- Call Officers' meetings as needed
- Prepare the schedule of activities and agendas for the meetings
- Coordinate initiation of pledges and induction of officers
- Monitor the Chapter's points with the National Office through close cooperation with the Reporting Secretary
- Make necessary arrangements for the Spring banquet

Vice-President

- Conduct and supervise operation of professional meetings in the absence of the President
- Distribute awards and honors when necessary
- Assist the President with activities as needed
- Maintain, update, and distribute the chapter handbook

Treasurer

- Maintain Chapter financial records and checkbook
- Pay all bills
- Assure collection of all money owed to Beta Alpha Psi
- Arrange year-end audit of financials
- Determine the correct amount and proper collection of:
 - (1) Initiation fees
 - (2) Chapter dues
- Develop a yearly budget to help estimate revenue and expenses for the upcoming year

National Reporter

- Prepare and send all reports to the National Office
- Ensure the fulfillment of all National reporting requirements
- Record the minutes at Officers' meetings
- Record attendance at all professional meetings

Liaison to the Business Community

- Maintain current membership, alumni firm, and faculty rosters with names and telephone numbers
- In conjunction with the Service Chairperson and Reporting Secretary, maintain a record of member and pledge participation and inform pledges qualifying for initiation
- Send confirmation letters and thank you notes to speakers
- Send invitations for special events to members, professionals, and guests

Chairperson of Service Activities

- Discover service opportunities for the Gamma Epsilon membership
- Make necessary arrangements for participation by members in local service activities
- Make necessary arrangements for Gamma Epsilon involvement in the Volunteer Income Tax Assistance Program
- Coordinate preparations with the IRS for the receipt of necessary instructions, training, and supplies
- Maintain records of pledge and member involvement at service activities.

Chairperson of Social Activities

- Develop a list of social activities for pledges and members to participate in
- Make necessary arrangements for participation by members in social activities
- Maintain records of pledge and member involvement at social functions

Faculty Advisor

- Advise officers in the operation of the fraternity
- Assist in arranging for guest speakers
- Act as a liaison between Gamma Epsilon and the National Office
- Assist officers in obtaining use of University services

III. Faculty Advisor Term

The term of the faculty advisor will be unlimited and subject to the discretion of the Chair of the Accounting Department.

IV. Committees

All committees shall be conceived and appointed by the President. The President has the power to elect a chairperson and delegate all necessary power as he or she sees fit.

V. Order of Conducting Business

Our professional meetings will be conducted on campus at a convenient time for our members. Currently, we hold our meetings on Wednesday nights. The President or appropriate substitute conducts these meetings. Professional dress is required for those in attendance and these meetings usually last between 45 minutes to 1 hour. In addition, we also hold off-campus activities and projects whose times and locations vary. A calendar of events will be distributed early in the semester.

VI. Method of Amending Bylaws

Proposals for amendments may come from any member. Approval of an amendment must be granted by both the President and the Faculty Advisor and must be in writing.

Gamma Epsilon Officers 2009-2010

<i>President</i>	Chris Konstandas	419-349-3737 Chris.Konstandas@rockets.utoledo.edu
<i>Vice- President</i>	Aaron Knapke	419-953-7288 Aaron.Knapke@rockets.utoledo.edu
<i>Vice- President (Fall only)</i>	Jennifer Brubaker	419-966-2072 Jennifer.Brubaker@rockets.utoledo.edu
<i>Treasurer</i>	Jennifer Baldwin	419-204-9766 Jennifer.Baldwin@rockets.utoledo.edu
<i>National Reporter</i>	Eylene Yu	419-944-6751 Eylene.Yu@rockets.utoledo.edu
<i>Business Liaison</i>	Steven Miller	440-829-5377 Steven.Miller@rockets.utoledo.edu
<i>Social Chair Service Chair</i>	Phillip Vine	419-320-6886 Phillip.Vine@rockets.utoledo.edu
<i>Multimedia Chair</i>	Ryan Bondy	567-277-0361 Ryan.Bondy@rockets.utoledo.edu
<i>Fundraising Chair</i>	Ben Blaesing	419-279-7002 Benjamin.Blaesing@rockets.utoledo.edu
<i>Faculty Advisor</i>	Dr. Diana Franz	419-530-4264 Diana.Franz@utoledo.edu

Pledge Requirements

To become a member, degree seeking undergraduate students and non-degree post-baccalaureate students must meet the membership eligibility requirements contained in the Constitution, as well as fulfill the pledge requirements below. Graduate students are not required to meet pledge requirements.

I. Professional Meetings

Pledges must attend all professional meetings during the pledge semester. One and only one absence will be tolerated.

II. Service Activity

Pledges will perform ten hours of service work in the pledge semester. An updated list will be provided each semester of the projects the Chapter is currently working on.

III. Social Activity

Pledges will be required to attend at least half of the social activities during the pledge semester (if we have three socials, you must attend two of them). Social events provide an environment in which members may feel at ease and focus on getting to know their fellow Betas. Group cohesiveness is a primary goal of Gamma Epsilon, as evidenced by this requirement.

IV. Professional Development

Pledges must fulfill at least one activity in this section during the pledge semester. An updated list will be compiled each semester in order to provide each pledge with a choice that meets his or her interests. Following are some examples of the kinds of activities that would fulfill this final requirement:

- Office Tours
- Job Shadowing a Professional Associate
- Interviewing a Professional Associate
- Outside Professional Meetings (i.e. IAA, IMA, CPA, etc.)

Once initiated, a student is considered a member for life. However, the panel of officers does reserve the right to revoke membership if it feels the situation calls for it.

Member Requirements

I. Professional Meetings

Members are expected to be present at no less than 4 professional meetings a semester. In the event a member does not meet this requirement, he or she will be placed on probation.

II. Service Activity

Members are expected to volunteer eight hours of time to the various service projects executed every semester. In the event a member does not meet this requirement, he or she will be placed on probation.

III. Social Activities

Members are expected to take part in one half of all social activities planned for the semester. In the event a member does not meet this requirement, he or she will be placed on probation.

IV. Probation

Any member who does not meet the criteria described above shall be placed on probation for one semester. If requirements are not met at the end of the probationary period, then the member shall sign a letter of resignation from the Chapter.

Annual Fundraising Event

Members and pledges are required to participate with the annual fundraising event either by active committee participation or volunteering on the day of the event.

Administrative Policies

Gamma Epsilon Chapter
Beta Alpha Psi

Checking account

Gamma Epsilon Chapter currently has a business basics checking account with KeyBank. The account may be moved to another bank at the Treasurer's discretion. The authorized signors on the account shall be the current Faculty Advisor, President, Vice-President, and Treasurer.

Expense Reimbursement

Members and pledges will be reimbursed for approved expenses relating to their participation in Beta Alpha Psi. The requirements for reimbursement are as follows:

- Obtain pre-approval from two of the following three individuals:
 1. President
 2. Vice-President
 3. Treasurer
- Turn in the original, or a copy of the original, receipt to the Treasurer.

Fee Reimbursement

Pledges will be reimbursed if they are not able to be involved with Beta Alpha Psi, only during the first semester of participation. The stipulations of receiving the refund are as follows:

- \$55 Non-refundable (National's portion)
- Remaining \$60 will be pro-rated based on time involved with Beta Alpha Psi
- A statement of withdrawal from Beta Alpha Psi must be submitted

Department of Accounting Faculty and Staff

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Wolfe, Glenn	419-530-2196
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