UNIVERSITY

OF

KENTUCKY



MEMBER HANDBOOK

Spring 2021

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**BETA ALPHA PSI BACKGROUND**

Beta Alpha Psi is a national scholastic and professional fraternity for Financial Information students and professionals. The primary objective of the fraternity is to encourage and give recognition to scholastic and professional excellence in the business information field.

Beta Alpha Psi was founded in 1919. The University of Kentucky's Alpha Mu chapter of Beta Alpha Psi was chartered in 1952. Today it is one of over 300 chapters nationwide with over 300,000 members initiated since the Fraternity's formation.

### VISION

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

### MISSION

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 and practice of accountancy, finance, business analytics and digital technology;
* providing opportunities for service, professional development, and interaction among members and financial professionals; and
* fostering lifelong ethical, social, and public responsibilities.

### PURPOSE

The purpose of Beta Alpha Psi is to engage with members, industry and educational institutions associated with the Beta Alpha Psi Professions to:

**Academic Excellence**  
Motivate, recognize and celebrate academic excellence  
  
**Professional Development**  
Facilitate workplace readiness, employment, credentialing, mentoring, networking and lifelong learning  
  
**Responsible Practices**  
Foster a commitment to ethics, service, belonging, and environmental, social, governance-responsible practices  
  
**Advocacy**  
Advocate for the benefits of education, practice, credentialing and partnering associated with the Beta Alpha Psi Professions  
  
**Shaping**  
Support the shaping of the relevant and successful evolution of education, practice and credentialing associated with the Beta Alpha Psi Professions

**National Website:** [www.bap.org](http://www.bap.org)

**OFFICERS**

**Andrew Moak**

***President***

armo262@uky.edu

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**Haley Studler**

***VP of Membership***

hcst235@uky.edu

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**Karolyn Holloway**

***Treasurer***

kgho227@uky.edu



**Tom Sanders**

***VP Community Service***

jtsa236@uky.edu



**Philip Worrell**

***VP of Activities***

pbworrell2@uky.edu

A person smiling at the camera

Description automatically generated with medium confidence

**Thalia Perez**

***National Reporter***

tkpe222@uky.edu

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***Tom Lewis, JD, MBA, CPA***

***Faculty Advisor***

tlewi3@uky.edu

Office: 435B



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**CONTACT INFORMATION**

BETA ALPHA PSI

ALPHA MU CHAPTER

COLLEGE OF BUSINESS AND ECONOMICS

SCHOOL OF ACCOUNTANCY

UNIVERSITY OF KENTUCKY

LEXINGTON, KY 40506

uofk.bap@gmail.com

**Chapter Website:**

http://gatton.uky.edu/programs/undergraduate/professional-development/student-organizations/beta-alpha-psi

**SPRING 2021 SCHEDULE**

**January**

January 28, 2021 – PwC

**February**

February 4, 2021 – CPA Exam Workshop Led by KyCPA

February 11, 2021 – Elliott Davis

February 18, 2021 – EY

February 25, 2021 – Dean Dorton

**March**

March 4, 2021 – MCM

March 11, 2021 – HCA

March 18, 2021 – Deloitte

March 25, 2021 – No Meeting (Enjoy the extended weekend!)

**April**

April 1, 2021 – APA

April 8, 2021 – Fifth Third Bank

April 15, 2021 – LBMC

April 22, 2021 – Blue and Co.

April 29, 2021 – TBD

May 6, 2021 – Spring Banquet

(Other networking, social, or community service events may be scheduled)

(All Technical meetings will take place on Thursdays from

6:30 – 7:30PM in **Gatton Room 191** with light dinner provided)





**POLICIES OF THE FRATERNITY**

**All events must reflect the professional nature of the fraternity.**

In keeping with the professional nature of Beta Alpha Psi, the Board of Directors requires adherence to the policy that no national, regional or local chapter activity has content that is demeaning or derogatory to any individual or group of individuals. All members are at all times expected to behave in a professional manner and to be punctual and present for all meetings and events. Dress code for all meetings and events is business casual unless otherwise stated.

**1. No Alcohol Policy**

Beta Alpha Psi prohibits the consumption of alcoholic beverages at any meetings, functions, or events that are sponsored, publicized, or otherwise endorsed by Beta Alpha Psi.

The prohibition of alcohol applies to the following:

* chapter meetings, regional meetings, national meetings, the Thomas J. Burns Undergraduate Student Seminar, the graduate case seminar, leadership programs, and all other meetings or programs of Beta Alpha Psi;
* all alcoholic products whether provided by the chapter, by a speaker or external organization, or whether available at a charge to members and/or guests.

Violation of this policy will result in sanctions as deemed appropriate by the Beta Alpha Psi Board of Directors.

**2. Non-Discriminatory Policy**

Membership in Beta Alpha Psi is open to all UK students regardless of race, ethnicity, national origin, religious, faith, age, gender, gender identity and expression, sex, sexuality, economic class, social class, and all other identities represented on our campus.

**3. No Solicitation Policy**

It is the policy of the Board to not permit chapter activities to be used as a conduit for the sale of products or services to students. Persons should not be asked to participate in a chapter activity if their participation is primarily promotional in nature. Any presentation regarding professional examinations, preparation for the examinations or a demonstration of an examination review program by a representative of a provider of review services is considered promotional in nature. Any chapter event, at which the chapter permits the solicitation of its members to purchase products or services, will result in the event being assigned no credit in any category of the Program for Chapter Activities.

**4. Attendance Policy**

Definitions:

1. Pledge: A Pledge is considered anyone who is a new member of Beta Alpha Psi and has not yet participated in an initiation ceremony, including reciting the initiation pledge. If you were previously pledged and had your membership revoked and later reinstated, you are from then on considered a pledge until participation in a new initiation and initiation ceremony has occurred.
2. Member: A Member is any member of Beta Alpha Psi who has been initiated and whose membership is in good standing.

Each participating member of Beta Alpha Psi is required to attend a minimum number of technical meetings each semester. Pledges are required to attend no fewer than ten (10) technical meetings per semester and Members are required to attend no fewer than 9 technical meetings per semester. Failure to meet the minimum requirement will result in the forfeiture of your membership as well as any local and/or national dues paid. It is strongly encouraged that all members attend all technical meetings and social events throughout the semester.

Attendance will be tracked throughout the semester and any anticipated absences should be communicated to the VP of Membership in a timely manner. Pledges are allowed two (2) unexcused absences per semester and Members are allowed three (3) unexcused absences per semester bearing in mind the minimum attendance requirement. An absence is considered excused as defined in 5.2.4 and its subsections of the University Senate Rules. Senate Rules 5.2.4.2 defines the following as acceptable reasons for excused absences: (a) significant illness, (b) death of a family member, (c) trips for members of student organizations sponsored by an educational unit, trips for University classes, and trips for participation in intercollegiate athletic events, (d) major religious holidays, (e) interviews for graduate/professional school or full-time employment post-graduation, and (f) other circumstances found to fit “reasonable cause for nonattendance” by the instructor of record. Documentation will be required for excused absences. Exceeding the number of unexcused absences in a semester will result in the forfeiture of your membership as well as any local and/or national dues paid.

Each semester, one to two mandatory events may also be scheduled. These events will be announced at the beginning of the semester. Failure to participate in any event labeled as mandatory, absent acceptable documentation supporting an excused absence, will result in the forfeiture of your membership as well as any local and/or national dues paid.

**5. Community Service Policy**

All members are required to complete four (4) hours of financial literacy service hours per semester. These hours can be completed by tutoring other accounting students, participating in VITA, participating in Junior Achievement, or in other pre-approved activities.

In addition to the financial literacy hours, each Pledge is required to complete 6 additional hours of community service per semester. Each Member is required to complete 4 additional hours of community service per semester. If you choose to volunteer outside of Beta Alpha Psi, you must complete the attached Outside Community Service Hours form by April 15, 2020. If you fail to complete the form, you will earn no credit. If you have any questions about BAP Community Service Requirements, please contact the VP of Community Service.

**COMMUNITY SERVICE**

**Financial Literacy Involvement Opportunities**

* **Junior Achievement**

JA is a non-profit organization that partners with volunteers from the community to teach elementary students about their roles as individuals, workers and consumers, and to prepare middle/high school students for key economic and workforce issues they will face. JA’s purpose is to inspire young people to value free enterprise, business and economics to improve the quality of their lives and be workforce ready.

* Students can do it individually or team up in and select a class to teach. You will need to select a day of the week that you will be available **for 5-6 weeks** in a semester.
* Location: Various Elementary, Middle, & High Schools in Lexington
* Hours Awarded: 7-8 (One per class and one for planning)
* **Tutoring**

Provide tutoring assistance to students in accounting courses.

* Dates/Times: Based on student’s needs
* Location: Set by tutor and student
* Hours Awarded: Number of hours spent with student requesting tutoring.
* Requirements: Grade of B or higher in course to tutor.
* Important Note: Tutoring has previously not been a heavily requested item by students, and as such should not be relied upon as a means to fulfill your community service requirements. If a student requests tutoring directly to BAP, an e-mail will be sent out with the subject and available meeting times. The first qualified student to respond will receive the opportunity.
* The Volunteer Tutoring form must also be completed and signed by both the member and the student receiving tutoring. You may use the same form for recurring sessions, with the student receiving tutoring initialing each item.

**Beta Alpha Psi Involvement**

* **American Cancer Society Hope Lodge - Community Service Event**
* We are in the planning stages of having a community service event this semester at the American Cancer Society Hope Lodge. This lodge is located near Kroger Field. We will prepare dinner, dessert, and play games with guests of the Hope Lodge. The time and date will be updated as the event is planned.

**Beta Alpha Psi – Volunteer Tutoring Form**

This form must be submitted by April 15th, 2021 for hours spent tutoring.

*SUBMIT TO* Tom Sanders at jtsa236@uky.edu

**Name of Member: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Signature of Member: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Date, Course Taught, Hours Spent, and Tutored Student’s initials if multiple dates:**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Total Number of Hours Completed:**

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**Student Receiving Tutoring Name and E-mail or Phone Number:**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Student Receiving Tutoring Signature:**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Beta Alpha Psi – Outside Community Service Hours**

This form must be submitted by April 15th, 2021 for hours spent tutoring.

*SUBMIT TO* Tom Sanders at jtsa236@uky.edu

**Name of Member: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Name of Organization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Description of Activities:**

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**Total Number of Hours Completed:**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Supervisor Name and Phone Number:**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Supervisor Signature:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**WHO SHOULD I CONTACT?**

**Haley Studler** - Please reach out to Haley first with your questions. She will be able to answer the majority of them. If you cannot attend a technical or a social, please contact her. Also, if you have any general questions regarding Beta Alpha Psi, she will be able to assist you.

**Karolyn Holloway** - Any questions regarding your membership dues.

**Tom Sanders** - Any questions regarding community service.

**Philip Worrell** - If you would like any details about events, such as time, attire, or location please contact Philip. However, please look at our schedule on our chapter's website to find out the dates of our meetings prior to asking him. Also questions regarding any fun, fresh ideas for Beta Alpha Psi.

**BETA ALPHA PSI**

Membership Contract

Spring 2021

The following is a list of the requirements for membership in the Alpha Mu Chapter of Beta Alpha Psi for the current semester:

* **MEMBERSHIP DUES**
  + **Pledges:** $75 due February 11, 2021 to Treasurer, Karolyn Holloway.
  + **Members:** $30 due February 11, 2021 to Treasurer, Karolyn Holloway.
  + A processing fee of $20 will be assessed on late payments/overdrawn checks.
* **ATTENDANCE**
  + **Pledges**: Requiredto attend **10** Spring Technical Presentation Meetings. No greater than 2 unexcused absences are allowed.
  + **Members**: are **required** to attend **9** Spring Technical Presentation Meetings. No greater than 3 unexcused absences are allowed.
  + Socials: You are required to attend those for which you are signed up.
* **CHAPTER INVOLVEMENT**
  + **Pledges:** Required to participate in **10 hours** of community service per semester, at least 4 of which must be financial literacy hours.
  + **Members:** Required to participate in **8 hours** of community serviceper semester, at least 4 of which must be financial literacy hours.
  + Community service hours completed outside of Beta Alpha Psi events must be pre-approved.
  + **All community service hours must be completed and be reported by April 15, 2021.**
* **OTHER**
  + Dress code for all meetings is **BUSINESS CASUAL** unless otherwise stated.
  + Professional behavior is expected at all times.
  + Members and pledges are required to be punctual and present for the duration of all organized events.
  + Record or registration of attendance to all events is sole responsibility of the member/pledge.
  + Must maintain minimum overall and accounting GPAs of 3.2.

If any of the above requirements are not fulfilled, membership in the organization as well as any local and/or national dues paid are forfeited.

Print Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ E-Mail \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_