# **CHAPTER BYLAWS**

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 Epsilon Kappa Chapter of Beta Alpha Psi at Appalachian State University (the Chapter).

# **Article 2: The objectives and purposes of the Chapter**

Beta Alpha Psi is an honorary and professional organization for students of accountancy, finance and information systems. Its stated purpose includes recognition of outstanding academic achievements in the field of accounting, finance and information systems; promotion of the study and practice of accounting, finance and information systems; 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: Categories of Membership**

**Section 1.** Membership in the Epsilon Kappa Chapter of Beta Alpha Psi shall be limited to persons of good moral character who have achieved scholastic and/or professional excellence in the field of accounting; who have been initiated according to the official Membership ceremony; and who are in good standing.

**Section 2.** Candidates are students who have declared a concentration in accounting (or have indicated an intention to concentrate in accounting) but who have not yet met the requirements for the Membership ceremony.

**Section 3.** Members of Beta Alpha Psi who have graduated shall become Alumni Members.

# **Article 4: Student Chapter Membership Ceremony**

Candidates who have met the requirements for Membership must be present for the Member initiation ceremony. A Membership ceremony in absentia will be granted only under extreme circumstances and the Membership in absentia must be approved by the BAP Executive Office and the BAP President. The official Membership ceremony shall be used.

# **Article 5: Candidacy – Non-Upper Level Candidates**

***Requirements***

**Non-Upper-Level Candidates**

A Non-Upper Level Candidate is currently taking their first 3xxx level accounting course. These requirements (listed below) apply for September and January Candidate inductions:

* Be currently enrolled in at least one upper-level accounting course
* Provide unofficial transcript to Dr. Brian K. Hasson, Faculty Advisor, at hassonbk@appstate.edu, for verification of a major in accounting and an overall GPA of at least 3.0
* Complete participation requirements for Epsilon Kappa Chapter Membership (see below)
* Pay one-time Candidate fee of $100

Non-Upper-Level Candidate participation requirements during the Candidate semester (for initiations to be held near the beginning of the following semester) will be established at the beginning of each semester, based on the number of professional and service activities planned for that semester.

# **Article 6: Candidacy – Upper Level Candidates**

***Requirements***

**Upper-Level Candidates**

An Upper-Level Candidate has completed their first upper-level accounting course at the beginning of the Candidate semester. These requirements (listed below) apply for September and January inductions:

* Provide unofficial transcript to Dr. Brian K. Hasson, Faculty Advisor, at hassonbk@appstate.edu, for verification of a major in accounting, an overall GPA of at least 3.0 and an upper-level accounting GPA of at least a 3.0
* Complete participation requirements for Epsilon Kappa Chapter Membership (see below)
* Pay one-time Candidate fee of $100

Upper Level Candidate participation requirements during the Candidate semester (for initiations to be held near the end of the Candidate semester) will be established at the beginning of each semester, based on the number of professional and service activities planned for that semester.

A cut-off will be established prior to the end of the Candidate semester, by which date, an Upper-Level Candidate will need to meet the professional and service activity requirements for Membership. This date will be set at the beginning of each semester. The date will be established to ensure sufficient time to notify Beta Alpha Psi headquarters of their pending initiation, so that Membership certificates can be ordered and received before the initiation date. Upper-Level Candidate initiations are typically held at the banquet at the end of the Fall (November) and Spring (April) semesters.

# **Article 7: Member and Membership Expectations**

Once the dual GPA (overall of at least a 3.0 and upper-level of at least a 3.0) has been achieved and confirmed, there are no other GPA checks that will occur during the remainder of the Member’s tenure as an undergraduate student in the Chapter.

***Graduating Members in Good Standing***

Undergraduate Members who graduate with their undergraduate degree and meet the qualifications for a Member in Good Standing, will be awarded Beta Alpha Psi honor cords and a stole, to be worn with their graduation regalia.

The criteria for being a Member in Good Standing, for purposes of determining eligibility to be awarded a set of Beta Alpha Psi honor cords and a stole for graduation are as follows:

1. Members who graduate in December:
   1. Meeting the professional and service activity requirements for an Upper-Level Candidate for that graduation semester, as set at the beginning of that particular semester.
2. Members who graduate in May who were inactive during the Spring semester (e.g., due to an internship):
   1. Meeting the professional and service activity requirements for Non-Upper-Level Candidates for the semester ***prior*** to their graduation (i.e., last) semester, as set at the beginning of that particular semester.
3. Members who graduate in May who were active during the Spring semester
   1. Meeting the professional and service activity requirements for Upper-Level Candidates for that graduation semester, as set at the beginning of that particular semester.

***Exceptions to Professional or Service Activity Requirements***

From time to time, there may be a need to consider an exception to the requirements then in effect, for achieving Candidate Professional Activity requirements, Candidate Service Activity requirements, Member in Good Standing Professional Activity requirements, or Member in Good Standing Service Activity requirements.

The Officer Group will convene and discuss the circumstances surrounding the exception request, when an exception needs to be considered. The Officer Group may request the Member or Candidate be present to explain the factors that led the exception request. The Officer Group will vote after sufficient discussion and debate, without the requesting Member or Candidate being present. A quorum of at least five Members of the Officer Group must be present (in-person or remotely). In the event of a tie, the Faculty Advisor will cast the deciding vote.

# **Article 8: Meetings for the conduct of business**

Actions requiring a vote of the entire Chapter will require a one-week notice of the meeting and agenda. Persons may not vote by proxy. Both Candidates and active Members in good standing are eligible to vote. A Chapter vote requires the attendance of greater than two-thirds of the Candidates and active Members. A majority of the vote will determine the final decision.

Actions requiring the vote of the Officer Group, consisting of the elected Chapter officers and the Faculty Advisor, will require a 48-hour notice of meeting and agenda. Persons may not vote by proxy. An Officer Group vote requires the attendance of at least five of the eight Members of the Officer Group. A majority of the votes will determine the final decision.

# **Article 9: Student officers**

***Chapter Officer Elections:***

The term of office will begin when the officers are inducted and end upon induction of the subsequently elected officer.

One meeting is to be set aside for nominations. Either a Member or a Candidate may make nominations. At the following meeting, nominated students will give a brief speech stating their goals, objectives, and reasons for running for office.

Each Member and Candidate of the Chapter will cast one vote via whatever means necessary, which will be collected and/or counted by the outgoing President and Faculty Advisor. The nominee with a majority of the cast votes wins.

All Vice President positions are to be elected for a duration of one semester. Officers currently holding a Vice President position, who self-nominate or are nominated for a second consecutive semester term in the same office, are eligible to run for and to be elected to hold the same office for a second, consecutive semester.

Candidates are eligible to be nominated and elected to serve in any of the four Vice President positions.

The following represents the sequence of Chapter officer elections:

* Fall semesters (November election)
  + Executive Officers (President, Executive Vice President, Secretary and Treasurer) for a term of the following calendar year (the following Spring and Fall semesters)
  + Vice Presidents for a term of the following Spring semester
    - Existing Members and Candidates are eligible to be nominated or to self-nominate for Executive Officer or Vice President Positions
* Spring semesters (April election)
  + Vice Presidents for a term of the following Fall semester
    - Existing Members and Candidates are eligible to be nominated or to self-nominate for Executive Officer or Vice President Positions

For the November Executive Officer elections, all Members at the time of the nominations, and all Candidates at the time of the nominations, who are on track to achieve the dual GPA requirements as well as the professional and service activity requirements in the current fall semester, shall be eligible for nomination.

The respective officer-elects will fully assume the functional duties of each officer position upon their induction as officers at the Fall Banquet.

The previous officers will provide transitional assistance to the officer-elects, including participation in officer transition meetings after the officer induction at the Fall Banquet and before the Fall semester final exams.

The previous officers are also expected to provide other transitional assistance as needed to run the Chapter's various functional areas during the remainder of the Fall semester, including Chapter meetings.

A Candidate who is elected to an Executive Officer position in November, may not achieve the dual GPA, professional and service activity requirements upon completion of the fall semester when elected. If this occurs, the Chapter shall have an officer election as early as possible in the subsequent semester to fill the officer position.

The election sequence is as follows:

***November Elections***

1. President
2. Executive Vice President
3. Secretary
4. Treasurer
5. Vice President – Candidate Programming
6. Vice President – Community Service
7. Vice President – Fundraising
8. Vice President – Media and Communications

***April Elections***

1. Vice President – Candidate Programming
2. Vice President – Community Service
3. Vice President – Fundraising
4. Vice President – Media and Communications

**Article 10: Duties and Responsibilities**

***President***

1. Call a meeting of the Officer Group within two weeks of installation as President to discuss planning of Chapter activities
2. Act as chairperson and produce agendas, with specific topics for discussion, for all meetings
3. Preside at meetings of the Chapter and of the Officer Group (begin, conduct, and end all meetings).
4. Know duties, responsibilities, and activities of all officers
5. Plan Chapter activities with Members of the Officer Group
6. Lead implementation of both Fall and Spring semester schedules
7. Determine that all reporting responsibilities and duties of all officers are performed in accordance with the Constitution and Bylaws, including ensuring the filing of all reports in an accurate and timely manner
8. Serve as a point of contact for the Chapter in all communications within or outside the Walker College of Business
9. Call to the attention of the Officer Group, areas of Chapter activities that need to be improved
10. Keep informed of all rules and regulations of Beta Alpha Psi
11. Delegate responsibilities among the other officers and Members when officers are unavailable to perform duties.
12. Coordinate with the Executive Vice President on the timing and nature of contacting professional partners.
13. Contact, correspond and coordinate with speakers and presenters for professional meetings
14. Appoint such committees as the constitution or bylaws, or vote of the Chapter shall provide
15. Seeks to promote the welfare of the Chapter and Beta Alpha Psi

***Executive Vice President***

1. Assist the President in the performance of prescribed duties and acts in the President's place in the event of absence or incapacity
2. In the event the office of the President is vacant, the Executive Vice President shall assume the duties and responsibilities of the President
3. Arrange and coordinate events, and assist in the coordination and implementation of Candidate induction and Member initiation activities
4. Be able to perform the duties of other officers in their absence
5. Reserve appropriate rooms for all meetings and Chapter events or activities
6. Perform monthly reconciliation of the bank statement to the Chapter’s accounting records, obtaining both from the Treasurer, providing to Chapter Advisor upon completion.
7. Serve as a point of contact for the Chapter in all communications within or outside the Walker College of Business, in the President’s absence.
8. Coordinate the annual review, edit and approval of revisions to the Chapter’s bylaws each year, to be completed by the end of September.

***Secretary***

1. Prepare and submit all reports as required by the Beta Alpha Psi Executive Office including reports of Chapter activities, using the Reporting Intranet
2. Keep an accurate record of all Chapter activities on the Reporting Intranet
3. Manage and record service activities of the Chapter and ensure all Members and Candidates are completing their respective service activity requirements; update the Reporting Intranet for such activities
4. Understand the Chapter’s Program for Chapter Activities and comply with the proper classification of the respective activities (e.g., reaching out, professional, etc.) when reporting results
5. Maintain Member and Candidate on the Reporting Intranet
6. Provide sign-in sheets for all Chapter meetings and activities and record attendance for ultimate input in the Reporting Intranet
7. Keep clear and often communication with Members and Candidates about their progress towards reaching professional and service requirements and answer any questions regarding these requirements
8. Coordinate with the VP of Community Service to stay up to date on all service activities offered and the details of those opportunities.

***Treasurer***

1. Collect all dues (from the Faculty Advisor) and other receipts, and ascertain that all expenditures are valid, supported by appropriate documentation, in accordance with the Chapter budget, and/or approved by the Officer Group
2. Ensure the remittance of Candidate fees, Initiation fees and Chapter dues are paid in accordance with the Program for Chapter Activities
3. Report the financial position and results of operations of the Chapter to the Officer Group, semi-annually, as of October 31 and April 30.
4. Lead the development and finalization of an annual Budget for the Chapter, with the assistance of the Faculty Advisor
5. Maintain all documents and files regarding Chapter finances
6. Establish the goals and activities budget for the upcoming academic year
7. Account for, and control, all organization financial activity
8. Maintain all Cash Receipts supporting documentation in the Chapter’s shared drive.
9. Other internal controls the Treasurer should implement:
   1. Ensure bank reconciliations are prepared monthly, reviewed and approved by either the Faculty Advisor or a Chapter officer other than the Treasurer.
   2. Ensure receipts are maintained for all disbursements
10. On a monthly basis, input each cash transaction into the general journal, utilizing the bank statements provided by the Faculty Advisor.
11. Communicate with Chapter officers about future events that will need support by the Chapter funds and agree upon pricing, fundraising, and other support that will be needed.
12. Distribute invoices to professional services firms, along with receipts for the purchase obtained from the Faculty Advisor, for those firms requesting the Chapter to purchase the pizza and to be invoiced by the Chapter for reimbursement
    1. Invoicing should occur within two business days of the Chapter meeting, copying the Faculty Advisor.
13. Coordinate with the VP – Fundraising on invoicing to sponsors for the annual golf tournament in April of each year.
    1. Invoicing should occur within two business days of confirmation from VP – Fundraising of a firm’s sponsorship

***Vice President – Candidate Programming***

1. Planning and coordination of recruiting efforts directed toward students who are not yet eligible for Candidacy or Membership
2. Collaborate with the Faculty Advisor on the documentation and onboarding of new Candidates at the beginning of each semester
3. Monitor the progress of Candidates during their Candidate semester and ensure they are aware of their progress toward satisfying the requirements for Membership.
4. Call upon Candidates and Members to assist with duties as considered necessary

***Vice President - Community Service***

1. Propose a community service event calendar to the Officer Group at the start of each semester
2. Assist the President and Executive Vice President with arrangements and coordination for all community service events and functions
3. Collaborate with the VP – Media & Communications to ensure proper communication on various social media platforms in use by the Chapter
4. Coordinate shift sign-ups and participation by Candidates and Members, for all community service events
5. Call upon Candidates and Members to assist with duties as considered necessary
6. Research new opportunities within the community for service events
7. Present new opportunities for service events, as they arrive, to Chapter in a timely manner.
8. Communicate with Chapters members and candidates regularly to ensure participation and understanding of requirements and expectations for each event.

***Vice President - Fundraising***

1. Serve as the lead organizer, communicator and facilitator of the Chapter’s fundraising activities – Golf Tournament in April of each year
   1. Develop and update the tournament budget, in collaboration with the Faculty Advisor, the Treasurer and the golf tournament committee
   2. Serve as primary point of contact in email and other communications with participating firms, participating students, golf course leadership and suppliers/vendors
   3. Develop and distribute sign-up forms for participating firms and participating students.
2. Serve as the lead organizer, communicator and facilitator of the Chapter’s fundraising activities – Kickball Tournament in September/October
   1. Develop and update the tournament budget, in collaboration with the Faculty Advisor, the Treasurer and the kickball tournament committee
   2. Serve as primary point of contact in email and other communications with participating firms, participating students, Watauga County Parks and Recreation and suppliers/vendors
   3. Develop and distribute sign-up forms for participating firms and participating students.
3. Assist the President and Executive Vice President with arrangements and coordination for all fundraising events and functions
4. Collaborate with the Vice President – Media and Communications to ensure proper communication on various social media platforms in use by the Chapter to inform the Chapter and promote events
5. Coordinate shift sign-ups and participation by Candidates and Members, for all fundraising events
6. Form committee(s) of Candidates and Members, serving as Chair, to facilitate planning and execution of events (e.g., golf tournament, kickball tournament or another annual fundraiser), as considered necessary
7. Call upon Candidates and Members to assist with duties as considered necessary

***Vice President – Media and Communications***

1. Maintain and enhance the Chapter’s website
2. Maintain and enhance the Chapter’s social media presence on various platforms (e.g., Instagram, Facebook, LinkedIn)
3. Work with the accounting department to ensure activities are broadcast on departmental and WCOB social media, including working with the accounting department’s Graduate Assistant responsible for departmental social media posts
4. Enter upcoming events in Engage in accordance with University student organization requirements

The Officer Group shall be composed of the officers listed above, the Faculty Advisor and co-Faculty Advisor, if any.

# **Article 11: Committees other than the Officer Group**

Each committee, formed on an ad hoc basis, will be headed by a chairperson that is appointed by the President. Committee participation is open to all Members and Candidates.

# **Article 12: Expulsion from Chapter**

**Section 1.** A Member or Candidate 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 Member.

**Section 2.** When such charges have been made against a Member or Candidate, the Faculty Advisor must make certain that the accused Member or Candidate is given notice and an opportunity to be heard concerning the charges. Notice must be given to the accused Member or Candidate by email at least thirty days before the hearing. Such notice shall include: (1) a copy of the charges made against the Member or Candidate; (2) the time, date, and place of the hearing; (3) an explanation of the expulsion procedures which include automatic review by the Officer Group.

**Section 3.** A committee of Members, appointed by the President in consultation with the Faculty Advisor, including at least two Faculty Members (exclusive of the Faculty Advisor of the Chapter), is to be selected by the Faculty Advisor and ranking Chapter officer to investigate the charges and decide as to whether the accused should be expelled. The findings should be based on a presentation of the charges by the accusing Member or Candidate and the accused has the opportunity to appear and explain the actions in question.

**Section 4.** If expelled, the Member or Candidate may request a hearing before the entire Chapter in a special meeting called for that specific purpose. A majority vote of the Chapter may reverse the conclusion reached by the Committee established in accordance with Section 3.

# **Article 13: Removal of Officers**

An officer of the Chapter may be discharged if he/she:

* Is not carrying out the duties of the office; or
* Is not participating as a Member of the Officer Group; or
* Is not adhering to the high moral and ethical standards of Beta Alpha Psi, or;
* Does not meet the requirements as outlined in Article 5.

An officer shall be discharged by a majority vote (excluding the Faculty Advisor’s, and if applicable, Co-Faculty Advisor’s vote) of all other Officer Group Members in the case of suspensions or other disqualifying events. An officer may appeal the decision to the Officer Group at which time the Officer Group would take a second and final vote.

# **Article 14: Resignation of Members**

**Section 1.** A Member or Candidate may resign from Beta Alpha Psi by notifying, in writing, the Faculty Advisor and the President.

**Section 2.** The resigning Member shall surrender the Membership certificate and other Beta Alpha Psi insignia to the Chapter. The Chapter must forward the Membership certificate to the Executive Office. Membership ceremony fees and Candidate fees are nonrefundable.

# **Article 15: Fiscal Year**

The fiscal year of the Chapter is a reporting year of May 1 to April 30.

# **Article 16: Authority**

These bylaws shall be the principle governing document of the Chapter. 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 17: Requirements for Amendment to the Bylaws**

An amendment to the bylaws requires a majority of the current Candidates and active Members to cast an affirmative vote in order for an amendment to be passed. A Candidate or a Member may propose amendments.

**II. CHAPTER BYLAW AMENDMENTS**

**Amendment 1: Supremacy Clause and Non-Discrimination Clause**

In accordance with Article XV-Addendum, Appalachian State University Clubs & Organizations, the Chapter hereby adopts the following clauses:

*Article XIII – Supremacy Clause; Section 1*

The Epsilon Kappa Chapter of Beta Alpha Psi agrees to follow all Appalachian State University, State, and Federal policies.

*Article XIV – Non-Discrimination Clause, Section 1*

The Epsilon Kappa Chapter of Beta Alpha Psi agrees that no student will be excluded from Membership or participation on the basis of his or her race, color, religious status or historic religious affiliation, sex, national origin, age, political affiliation, veteran status, disability, sexual orientation, gender identity and expression, or unless exempt under Title IX, gender.