



## Nu Pi Chapter of Beta Alpha Psi 2026-2027 Board Position Descriptions

*\*\*\*Board positions are open to current BAP members, petitioning candidates, and non-members that have met Beta Alpha Psi Petitioning Chapter Requirements (see below) and will fulfill all BAP requirements by Week 3 of Spring Quarter 2026\*\*\**

### Requirements:

1. Executive Officers must meet Beta Alpha Psi Petitioning Chapter requirements (3.25 GPA, 68 units completed by the end of Winter 2026, 1 completed upper division course)
2. Must be able to serve the full term (March 2026-March 2027)

### Board Positions

#### **1. President**

- a. Represent Beta Alpha Psi at UCI on campus
  - i. Keep different organizations on campus informed of the organization's activities
  - ii. Keep relations with Paul Merage School of Business, UCI Career Center, School of Social Sciences, as well as the professors and students
  - iii. Serve as one representative for Career Center Affiliates and MUSA Business Leaders Roundtable
- b. Represent Beta Alpha Psi at UCI off campus to local firms and universities
  - i. Keep up relations with the Beta Alpha Psi chapters of other schools, including Cal State Fullerton and Long Beach (open to other schools and organizations)
- c. Maintain oversight of the entire board
  - i. Lead the establishment of club goals and plans
  - ii. Hold weekly board meetings to discuss agenda and goals
  - iii. Ensure the details are covered and everyone understands their responsibilities
  - iv. Inform officers of upcoming opportunities both on- and off-campus to share with members
  - v. Motivate officers to perform to their maximum potential for the organization
  - vi. Ensure all officers are fully utilized through proper delegation and all officers perform their duties in a quality and timely manner
- d. Plan for Meet the Firms (Fall Quarter), Meet the Firms (Winter Quarter), Accounting Fest (Spring Quarter), and Spring Banquet
- e. Coordinate meetings and events
  - i. Update events calendar for each quarter (member events and general events)
  - ii. Make Google Calendar invites

- iii. Keep executive board in the loop
- f. Long-term decision making/planning (i.e. tracking metrics, board restructure, new initiatives, etc.)
  - i. Constantly think of what can be done to improve Beta Alpha Psi
- g. Collaborate with AA President to arrange board photoshoot during Spring Quarter
- h. Work with AA President to plan, organize, and interview board candidates for the following year
- i. Work with AA President to improve firm sponsorship package options based on changing needs and firm preferences (must consider virtual events)

## **2. Vice President**

- a. Serve as President's right hand and operations advisor in all board meetings and Reaching Out Activities
- b. Serve as a liaison with other BAP chapters to maintain relationships and develop multi-chapter bonds
  - i. Attend National BAP Conferences to create relationships with BAP members across the nation
  - ii. Plan for Regional Conferences to ensure BAP members in the western region actively develop their professional skill set
- c. Communicate with recruiters at local firms for events such as:
  - i. Speaking Engagements
  - ii. Panels/Workshops
  - iii. Mock Interviews
  - iv. Office Tours
  - v. Office Hours
  - vi. Large Scale Events
    - 1. Winter Meet the Firms
    - 2. Accounting Fest
    - 3. Spring Banquet
    - 4. Recruiter Panel
- d. Organize documentation for events (spreadsheets of event dates, times, and rooms)
- e. Maintain professional etiquette by responding to emails in a timely manner
- f. Maintain communications with firms
  - i. Follow up and finalize details regarding upcoming events
    - 1. Details include time, location, number of professionals, topic of presentation, parking permits, etc.
    - 2. (Virtual) Details include time, date, number of professionals, and platform (Zoom, Uniflow etc.) links
  - ii. Respond to email inquiries from recruiters, professionals, and advisors

## **3. Executive Director of External Affairs**

- a. Plan Community Service Events
  - i. Provide opportunities for Beta Alpha Psi members and UCI students to interact with professionals through Corporate Social Responsibility (Community Service)
    - 1. Plan a large-scale community service event for Fall and Winter quarter with a Sponsoring firm and/or firms

- a. Example ideas: Partnering up with a firm and organizing a Food Bank event, Beach walk volunteer event, Having a firm sponsor purchasing books for underprivileged children and volunteering at a Boys & Girls club
    - ii. Organize 2-3 smaller local community service opportunities for members every quarter
    - iii. Coordinate with Secretary to ensure members are on track in terms of completing community service hours
    - iv. Promote the marketing of the events with the Director of Marketing and encourage all BAP & AA members and UCI students (interested in accounting or not) to participate in this event
  - b. Plan Alumni Events
    - i. Manage and update a BAP/UCI Accounting Alumni database & facilitate alumni/student interactions by encouraging them to go on coffee chats
      - 1. Send the data for the Secretary to forward to members at the beginning of every quarter
    - ii. Ensure alumni are invited and RSVP'd to socials
    - iii. Reach out to alumni and have coffee chats in order to better serve as a connection for students and alumni
  - c. Lead the Accounting Tutoring Program
    - i. Coordinate with MGMT 30A and MGMT 30B professors every quarter to gather materials to tutor students
    - ii. Communicate with the Secretary to encourage BAP members to complete their mandatory 2-hour community service from tutoring
    - iii. Reach out to advisors before each quarter in order to book bi-weekly classrooms at Merage for tutoring
    - iv. Assign tutors to different topics and shifts

#### 4. Secretary

- a. Monitor membership for Beta Alpha Psi
  - i. Work alongside Treasurer to audit membership dues
- b. Organize membership benefits
- c. Update the membership roster
- d. Monitor maximum attendance of two free events per person (alongside AA Secretary)
- e. Monitor Beta Alpha Psi candidates' professional and community service/ROA hours
- f. Prepare and submit membership reports for Beta Alpha Psi once a quarter to Faculty Advisors
- g. Record minutes at every board meeting
- h. Record Metrics from each event including:
  - i. Attendance
  - ii. Cost
  - iii. Firm
  - iv. Percentage increase/decrease from the previous year
- i. Maintain the organization of the Google Drive and ensure proper transfer of files from the outgoing board to the incoming board
- j. Keep the Intranet updated by reporting BAP hours and other necessary information
- k. Organize sign-in sheets and registration forms before and after every speaking engagement

- l. Send emails to members regarding BAP membership
  - i. Emails include: reminders about upcoming deadlines, remaining requirements, and membership
- m. Respond to student inquiries via email

## 5. Treasurer

- a. Create a budget for the academic year
  - i. Speaking Engagements
  - ii. General Member Socials
  - iii. Winter Meet the Firms
  - iv. Accounting Fest
  - v. Spring Banquet
  - vi. AALDP
  - vii. Membership Materials (Booklets, Flyers, T-shirts)
- b. Maintain a ledger on Google Sheets to record transactions
- c. Produce quarterly financial statements (Income Statement and Balance Sheet)
- d. Process all reimbursements and keep receipts for documentation in a timely manner
  - i. Reimbursements will be done virtually through the ASUCI student government platform
- e. Manage all incoming checks to the organization from firms
  - i. Membership checks as well as firm checks will need to be mailed to the ASUCI Accounting office
  - ii. Must request financial reports and club balances bi-monthly to ensure checks have been properly deposited
- f. Report Beta Alpha Psi financials on the Intranet
- g. Collect money from membership recruitment (high emphasis is placed on the use of Venmo)

## 6. Director of Marketing

- a. Maintain the **accountinguci.com** website, **accounting.uci** Instagram account, **BAP Instagram account**, and respond to any individual inquiries
- b. Be familiar with Weebly website developer program
- c. Update all necessary information, documents, and event details on the website and linktr.ee
- d. Promote all events on social media platforms and proactively reply to student messages
  - i. Create graphics/flyers promoting BAP events, conferences, and any BAP specific events
  - ii. Create engaging short-form video content on Instagram Reels
- e. Serve as the historian (e.g. collecting pictures and archives)
  - i. Upload pictures, flyers, cover photos, etc. into the marketing folder so the following board member will have examples/ideas to go off of
- f. Design AA/BAP T-shirt graphic
- a. Take photos at all AA/BAP events in order to publicize on socials