

NATIONAL ASSOCIATION OF BLACK ACCOUNTANTS, INC.



"Lifting As We Climb"

**STUDENT CHAPTER REPORTING
AND EVALUATION PROGRAM**

Revised September, 2000

National Association of Black Accountants, Inc. Student Chapter Reporting and Evaluation Program

Overview

All chapters in the National Association of Black Accountants, Inc. (NABA) are required to report periodically on their activities in meeting the goals and objectives of NABA. This report has been designed to be simple and free flowing rather than to comply with a strict set of criteria. This report requires reporting against those objectives, which we believe to be most critical: chapter planning, member recruitment and development, chapter programs and the reporting of activities, The Minimum Operating Requirements (Appendix A) provides further guidance.

The reporting calendar is as follows:

April 1	Beginning of the first reporting and evaluation period
October 31	Chapter reports are due for the first reporting period (April 1 to September 30)
November 30	Feedback on first reporting and evaluation period to chapters. Status of evaluation results for the first six months reported to the Regional Presidents.
January 31	Chapter reports are due for the second reporting period (October 1 to December 31)
February 28	Feedback on second reporting and evaluation period to chapters. Status of evaluation results for the first nine months reported to the Regional Presidents.
April 30	Chapter reports are due for the third reporting period (January 1 to March 31)
May 31	Feedback on third reporting and evaluation period to chapters. Status of full year evaluation results reported to the Regional Presidents.

Category 1 – Planning

This section relates to how effectively the chapter plans its activities. The Chapter Profile (Appendix C) is to be completed to ensure effective and timely communication channels with the Chapter are established (100 points). The Operating Plan (Appendix D) is to be prepared to outline the timing, costs and method to achieve the planned chapter activities for the year (200 points). The Operating Budget (Appendix E) is the planned revenue and expenses for the year (200 points).

Student Chapter Reporting and Evaluation Program

Category 2 - Member Recruitment and Development

This section relates to activities undertaken by the chapter to recruit and develop its members. The chapter is encouraged to be creative in its programs. Membership drive(s) are encouraged (50 points for each up to 100 points per year). The chapter should hold regular meetings of its membership (10 points each up to 100 points per year). Other membership development programs (seminars, etc.) should be executed during the year. (10 points each up to 100 points per year).

Category 3 - Chapter Programs

This section relates to other chapter programs. Several have been identified: participation in the Student Conferences (10 points per member attending up to 100 points); participation in UNCF telethon and the VITA program (10 points per member for participation in each program up to 100 points per year). Other programs are encouraged, e.g., articles for Chapter-to-Chapter, etc. (Up to 100 points depending on the activity).

Category 4 - Chapter Reporting

This section relates to the timely reporting of chapter activities. The Chapter Report (Appendix A) should be prepared in accordance with the reporting schedule noted above (100 points for each report). Financial Statements in the general format of Appendix E should be submitted quarterly (100 points for each set of financial statements up to 300 points). Form 990 (Appendix F) should be prepared in accordance with the provided instructions (100 points).

Documentation standards

Sufficient documentation must accompany the National Office copy of your report to substantiate the occurrence of the event. For example, the agenda and sign-in would support a chapter meeting, etc.

Attachments

Appendix A	Chapter Report
Appendix B	Minimum Operating Requirements
Appendix C	Chapter Profile
Appendix D	Operating Plan template
Appendix E	Financial Statement template
Appendix F	Form 990

NATIONAL ASSOCIATION OF BLACK ACCOUNTANTS, INC.
Student Chapters
Minimum Operating Requirements

- Chapter Profile

The chapter profile provides basic information about the chapter's current administration, which allows NABA to communicate with the chapter's leadership.

Must be mailed to the Regional President, Professional Chapter President (for chapter with supervisory responsibility), Faculty Advisor and the National Office. This profile should be mailed prior to June 30 for the succeeding year but in no event later than October 31.

- Operating Plan

The operating plan outlines the chapter's programs for the current year and the resources required to execute these programs.

- Calendar of events - Describe each activity that the chapter will undertake, the timing of the event and the resources required, both human and financial.
- Financial statements - A functional budget should be prepared for each activity including administration, which should account for items such as membership dues, etc.

Must be mailed to the Regional President, Professional Chapter President (for chapter with supervisory responsibility), Faculty Advisor and the National Office. The operating plan should be completed as soon as possible but not later than October 31.

- Financial Statements

- At the conclusion of the fiscal year (June 30), a balance sheet and income statement must be prepared. Preparation of quarter financial statements is encouraged.
- IRS Form 990 must be prepared to report results of activities in accordance with NABA's tax exempt status.

Must be mailed to the Regional President, Professional Chapter President (for chapter with supervisory responsibility), Faculty Advisor and the National Office. Please note that Form 990 is required to be filed with the IRS if gross revenue exceeds \$25,000, however, seek advice from the professional chapter before filing with the IRS. All financial statements noted above must be mailed by August 31.

- Quarterly Chapter Report

This report is used to report the activities of the chapter on a quarterly basis. This report is mandatory. Reports submitted on a timely basis will make the Chapter eligible for participation in the evaluation program.

Must be mailed to the Regional President, Professional Chapter President (for chapter with supervisory responsibility), Faculty Advisor and the National Office. This report is due 30 days after the end of each fiscal quarter.

- Non-compliance with any of the above provisions could result in chapter suspension.

Appendix B

National Association of Black Accountants, Inc.
Student Chapter
Period Ending _____, 20__

Quarterly Report Summary

List the three- (3) most significant activities since the last chapter report:

- 1.
- 2.
- 3.

Number of current members

Category I – Planning

Points

- Chapter Profile
- Operating Plan
- Operating Budget

Category II - Member Recruitment and Development

- Membership Drive
- Chapter Meetings
- Other member development programs (Specify on a separate sheet)

Category III - Chapter Programs

- Student Conference participation
- UNCF/VITA participation
- Others (Specify on a separate sheet)

Category IV - Chapter Reporting

- Chapter Report
- Quarterly Financial Statements
- Annual Form 990

Total points assigned for this report

Appendix B

Note: Please attach the appropriate support to document the occurrence of each event.

Chapter President Name: _____ Signature: _____

Address: _____

City: _____ State: _____ Zip: _____

Home Phone: _____ Other Phone (specify): _____

Faculty Advisor Name: _____ Signature: _____

Address: _____

City: _____ State: _____ Zip: _____

Home Phone: _____ Other Phone (specify): _____

National Association of Black Accountants, Inc.
Chapter Profile
Student Chapter
Fiscal Year 20__ (July 1, 20__ to June 30, 20__)

College/University Name: _____

Chapter President Name: _____ e-mail: _____

Home Phone: _____ Other Phone (specify) _____

Chapter Phone: _____ FAX: _____

Chapter Mailing Address:

Street Address: _____

Street Address 2: _____

City: _____ State: _____ Zip Code: _____

Faculty Advisor's Name: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Office Phone: _____ Office FAX: _____

Faculty Advisor's Name: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Office Phone: _____ Office FAX: _____

Frequency of meetings:

___ Weekly ___ Bi-weekly ___ Monthly ___ Other _____

Meeting Location: _____

Meeting Time: _____

NABA Professional Chapter to which you report: _____

Please attach a listing of the Chapter's Board of Directors including: name, address, phone and fax numbers and position held.

National Association of Black Accountants, Inc.
Operating Plan Template

Calendar of Events

<u>Date</u>	<u>Activity</u>	<u>Place</u>
	Activity 1	
	Activity 2	

Detailed Operating Plan

<u>Activity</u>	<u>Target Date</u>	<u>Responsibility</u>	<u>Revenue</u>	<u>Expenses</u>
Activity 1			\$	\$
Activity 2			_____	_____
Total			\$ _____	\$ _____

**National Association of Black Accountants, Inc.
Financial Statement Template**

Balance Sheet

Assets:		Liabilities:	
Cash	\$	Accounts payable	\$
Investments		Accrued liabilities	
Prepaid assets		Others (define)	_____
Others (define)			
		Total Liabilities	_____
		Fund Balance	_____

Total Assets	\$ _____	Total Liabilities and Fund Balance	\$ _____

Income Statement

	<u>Actual</u>	<u>Budget</u>	<u>Actual over Budget</u>
Revenue:			
Membership dues	\$	\$	\$
Interest income			
Others (define)	_____	_____	_____
Total revenue	_____	_____	_____
Expenses:			
Meeting costs			
Travel			
Bank fees			
Others (define)	_____	_____	_____
Total expenses	_____	_____	_____
Excess revenue over expenses			
Fund Balance, Beginning			
Fund Balance, Ending	\$ _____	\$ _____	\$ _____