



**A**ccounting **C**areer **A**wareness **P**rogram

NABA **ACAP**®

# Grant Program Toolkit

Summer 2021



*"Lifting As We Climb"*

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# OVERVIEW & GOALS

## OVERVIEW

The National Association of Black Accountants, Inc. (NABA) is committed to increasing the likelihood that under-represented high school students will complete college and become transformative leaders in the accounting and finance professions. The Accounting Career Awareness Program (ACAP) provides a unique bridge from high school to college that allows students to become prepared and informed about the expectations of college life and opportunities in accounting and finance-related fields. In addition, the program serves as a motivational tool to inspire students to increase their fundamental competence in the skill sets related to employment in those fields, even while in high school.

ACAP is an intensive week of programming for select high school students who NABA identifies as potential candidates for accounting and finance careers due to interest and academic performance. At the end of the week, students should have developed a clear understanding of the career opportunities in the accounting profession, while developing a personalized, actionable college and career plan.

There are two types of ACAP programs: National and Local. They each have similar goals and programming is designed to push students to achieve greater academic excellence because of the motivation and college/career planning associated with early accounting and finance career aspirations. The distinct difference is that the national program reduces extensive administrative requirements from local chapters.

NABA has developed a measurement system to gauge success in reaching specific goals related to the ACAP program: These metrics serve two purposes:

- They provide the organization with a mechanism to measure the overall effectiveness of its programmatic elements and curriculum.
- They provide students with a quantitative assessment of the state of their college and career preparation.

The metrics are designed to measure achievement on benchmark goals related to key performance indicators that correspond to the ACAP values.

## GOALS

Our objectives for students participating in the program are the following:

1. Obtain a basic understanding of career paths in accounting and finance.
2. Demonstrate a fundamental understanding of the importance of a high-grade point average.
3. Gain insight on how to improve SAT and ACT scores.
4. Obtain an understanding of the college admissions process.
5. Obtain an understanding of the college financing process.
6. Understand and embrace effective study skills.
7. Create a thoughtful, actionable, college and career plan.

# ACAP STAKEHOLDERS

## NABA

- Commitment leverage best practices and deliver results
- Infrastructure and technology to track student progress
- Dedicated staff to coordinate program execution and growth
- Commitment to continuous improvement
- Distribution of funds to individual ACAP Programs

## AICPA

- Program evaluation
- Monitor program
- Ensuring return on investment
- National Investment

## Major Firms

- Commitment to support a successful program
- Access to key staff to participate in program activities
- Provide constructive feedback on program and results

## Colleges & Universities

- Maintain a culture that embraces diversity & inclusion
- Access to faculty and facilities on campus
- Explore financial support for students
- Commitment to continuous improvement

## State Societies

- Commitment to support a successful program
- Access to key staff to participate in program activities
- Provide constructive feedback on program and results

## Community Partners

- Provide funds, in-kind gifts
- Commitment to support a successful program

# ACAP GOVERNANCE

## NABA NATIONAL

NABA oversees the national ACAP program. They provide feedback and input on individual programs. They provide guidelines and counsel to ACAP Program Directors on various issues such as legal requirements and overall program strategy.

NABA is also responsible for distributing pre- and post-survey links to each ACAP program director.

NABA must provide its sponsors an annual ACAP report that includes the following:

- Financial reporting
  - NABA's allocation of sponsor funds
  - All program budgets and expenses
  - All funding received at the national level and by individual programs
- Program metrics
  - Student attendance
  - Demographics by race, gender, and grade-level
- Long-Term Metrics
  - Average Number of Students Who:*
    - Complete high school
    - Apply to college and are accepted (total per cohort/year/location)
    - Attend a four-year university
    - Become accounting majors
    - Attend a community college
    - Transfer to four-year university
    - Receive scholarships (total per cohort/year/location)
  - Post College Metrics:*
    - Students who sit for the CPA
    - Hiring rates

## ACAP DIRECTORS

ACAP Program Directors lead individual programs. They embody the program's values and provide leadership through management of funds, people, site development, and program sustainability.

They work to execute timelines and work with NABA and local partners on program development and delivery.

Each Director must develop their own program budget and invoice their funders to cover the projected costs.

Each Director reports to NABA and may hire volunteers, committees or paid staff as needed to meet the goals of the program.

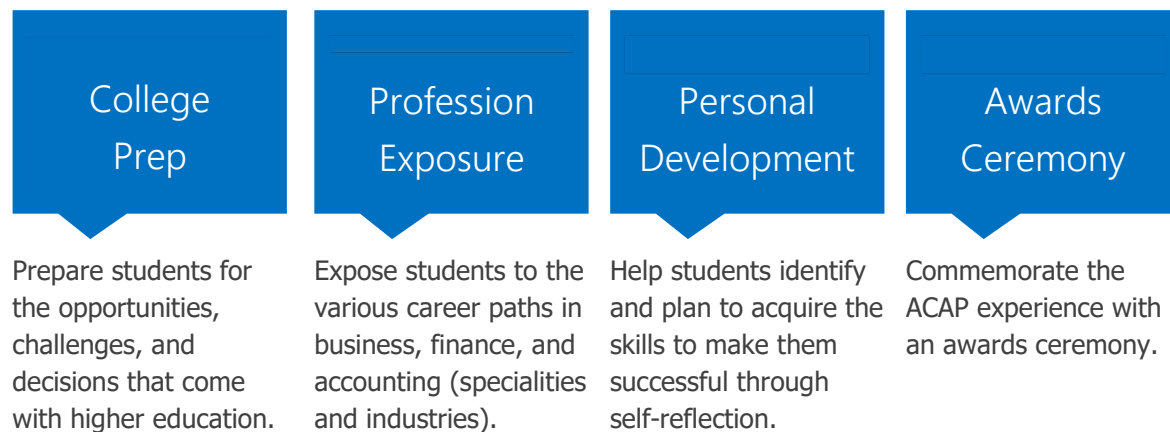
Each ACAP Director must provide NABA with a report after the program that includes the following:

- Program agenda
- Financial reporting
  - Program budget and expenses
  - Funding received
- Program metrics
  - Student attendance
  - Demographics by race, gender, and grade-level
- Post-program interaction with students

Program Directors must also facilitate communication with ACAP alumni to capture data for long-term metrics.

# PROGRAM ELEMENTS

ACAP was founded by NABA in 1980 to increase the understanding of accounting and business career opportunities among high school students from underrepresented ethnic groups.



## College Prep

- Prepares students to pursue higher education.
- Informs students about the degree paths available in accounting, business and finance.
- Gives students the experience of living and learning on a college or university campus.

## Educate

ACAP is a college immersion experience. Sophomore, junior, and senior high school students typically spend a week together on a college or university campus. They are given the experience of interacting with college professors, living in a residence hall, and eating on-campus dining.

When not on a field trip, students work together on various projects in a classroom setting. They also learn from academic professionals how to navigate the college application process, financial aid, and scholarships.

## Profession Exposure

- Informs students about the career paths available in accounting, business and finance.

## Excite

Students are introduced to the careers of accounting, finance, leadership and management. CPAs and business leaders share their experiences and provide tips for success. Additionally, students may attend workshops on communication, interview skills, resume writing and mentee-mentorship. Students may also have the opportunity to visit and tour a corporation.

## Personal Development

- Gives students a clearer picture of the skills they need to succeed in college and beyond.

## Evaluate

Personal Development is a reflective process. through program activities and the pre- and post-program evaluations, students will be encouraged to think about the skills they have and how they improve upon them. It also gets them to think about what skills they need to be successful.

## Closing Ceremony

- Students have the opportunity to win scholarships and commemorate their experience.

## Edify

The program concludes with an awards ceremony for students, parents, speakers, staff, volunteers and partners/sponsors where college scholarships and other awards are presented to students.

Some ACAP Programs are “commuter programs” in which students travel daily to and from the program site. The program schedule must be adjusted to accommodate for traveling time (consider commutes), non-traditional students, and programmatically directors must find ways to build cohorts and team building activities.

# FUNDING MODEL

Many organizations are moving towards a Collective Impact model of funding, which is built on common agenda for change, a shared understanding of problems and a joint approach to solving them. In Collective Impact, open and continuous communication builds trust, assures mutual objectives, and creates common motivation.

An ACAP Director should expand their program scope and opportunities for success by collaborating with partners to fulfill the needs of the program. Partners can include high schools, community colleges and universities as well as accounting organizations and other businesses, affinity groups such as the local chapters of accounting organizations (e.g. NABA, ALPFA, Ascend and NCPACA, state CPA societies) and community organizations. Cash, pro bono services, and in-kind gifts may be pursued.

<b>NATIONAL ASSOCIATION OF BLACK ACCOUNTANTS, INC.</b>				
<b>ACAP Program Sample Budget - Based on 30 Participants</b>				
		<b>Budget</b>		<b>ACTUAL</b>
<b>REVENUE:</b>				
<b>Monetary Contributions:</b>				
	Total Corporate Sponsorships	\$ 25,500		
	Circle of Influence / Individual Sponsors	\$ 3,000		
	Other Revenue			
	Student Room Deposits	200		
	Ceremony - ticket sales	300		
	Total Other Revenue	\$ 500		
<b>In-Kind Contributions:</b>				
	Firm Scholarships	2,000		
	University support	5,000		
	Total In-Kind Contributions	\$ 7,000		
<b>Total Revenue</b>		<b>\$ 36,000</b>		
<b>EXPENSES:</b>				
<b>Program:</b>				
	Room and Board-- University (in-kind)	5,000		
	Room and Board-- University	2,500		
	Parking Passes and lost key	100		
	Stipends--Exec. Director & Counselors	7,000		
	Food - Purchases for Executive RT/Opening Reception/ Grab bags for 75/Gratuity	500		
	Food--Closing ceremony	9,000		

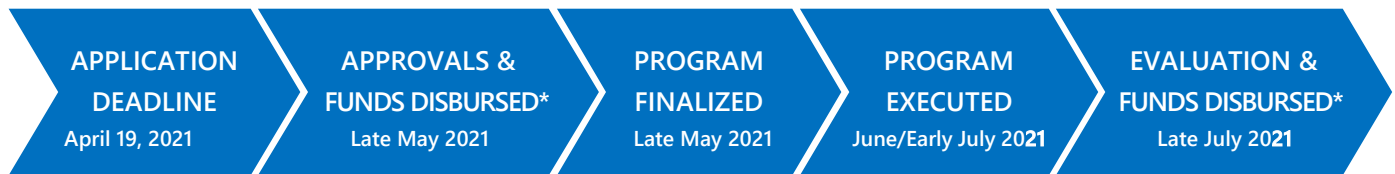


	Food - Opening Reception	1,000		
	Off Site Social Activity	1,500		
	Scholarships (in-kind)	2,000		
	Scholarships	1,000		
	Monetary Awards/Prizes	500		
	Ice Cream Social	300		
	Transportation (2 buses)	1,000		
	Books/Binders/Applications	500		
	Other - Accident Insurance	300		
	T-Shirts/other promotional items	500		
	<b>Subtotal</b>	<b>\$ 32,700</b>		
	<b>Printing:</b>			
	Promotional and Marketing Materials/Website	200		
	Stationery & Supplies	200		
	Program Booklets (closing Ceremony)	1,000		
	<b>Subtotal</b>	<b>\$ 1,400</b>		
	<b>Other Misc. Expenses</b>			
	Graphic Design for ceremony covers/table tents/table tabs, promotional cards	100		
	Photography/Videographer	1,000		
	Picture frames for student certificates	25		
	<b>Subtotal</b>	<b>\$ 1,125</b>		
	<b>Total Expenses</b>	<b>35,225</b>		
	<b>Excess Revenue Over Expenses</b>	<b>\$ 775</b>		

# NABA GRANTS

## Obtain funding from NABA National

NABA National will offer grants to programs following the best practices outlined in the process that individual ACAP Programs must follow is outlined below.



\*Funds will be disbursed to awardees in three installments. Of the total award, 50% and 40% will be distributed between January and early June. The final 10% will be distributed upon receipt of the post-workshop survey response.

**Eligibility:** This opportunity is open to colleges and universities with accredited accounting and finance programs. Priority will be given to new ACAP programs as NABA is looking to expand the number of ACAPs across the country.

### General Guidelines:

1. Preference will be given to those who have strong cultures of inclusion (culture alignment), high CPA pass rates, and are AACSB or ACBSP accredited schools.
2. A maximum of five grants will be awarded each year.

### Budget Allocation:

1. Funds can be used to cover:
  - Student costs, materials, supplies, and student travel
2. Funds may not be used for:
  - Personnel costs, salary, proposal development costs, or non-student travel
3. Funds may not be used to support non-ACAP programs.
4. Funds must be used during the summer June-July.

### Requirements:

1. Submission of complete proposal (development guidelines are below).
2. Utilization of the prescribed pre and post assessments for student participants.
3. Submission of a progress report that includes a selection process update and tentative agenda within 45 days of the scheduled event.
4. Submission of a final report that includes final list of participants, final agenda, final financial statement, and evidence of partnerships within 90 days of workshop completion.
5. Minimum participation of at least 25 student attendees.

**Proposal Development:**

The proposal should contain the following sections:

1. Project Description – not to exceed five pages and to contain the following:
  - a) Detailed program description
  - b) Outlined agenda with a minimum four-day instruction and must include at the minimum these program elements:
    - *College Prep*: Prepare students for the opportunities, challenges, and decisions that come with higher education.
    - *Profession Exposure*: Expose students to the various career paths in business, finance, and accounting (specialities and industries).
    - *Personal Development*: Help students identify and plan to acquire the skills to make them successful through self-reflection.
    - *Awards Ceremony*: Commemorate the ACAP experience with an awards ceremony.
2. Competitive student selection process with adherence to the following minimum student criteria:
  - Sophomore, junior, senior high school student
  - Have a minimum 3.0 GPA
  - Be actively involved in campus and community activities
  - Be a U.S. citizen or permanent resident
3. Describe the environment of diversity and inclusion on the campus where the program will be administered. Please include any incidents of reported discrimination.
4. Description of your 3-5-year plan on recruiting underrepresented minorities into the accounting profession.
5. Description of your strategies to continue to engage ACAP alumni post-workshop.
6. Names, qualifications, and contact information of the person(s) that will be primarily responsible for the implementation and completion of the proposed workshop.
7. Acknowledgement of support from state society.
8. Detailed program budget with explanations and descriptions of alternative sources of funding, if necessary.

**Submission:**

All grant proposals and applications must be submitted through the NABA ACAP Grant proposal portal which can be accessed using the link below.

<https://survey.alchemer.com/s3/6184054/75de18a54578>

# MARKETING TO STUDENTS

An important element of making an ACAP successful is making students and their influencers aware of it through marketing. Here are some ideas that may provide a good foundation for your marketing efforts. Adapted from *College Marketing 101: An Authoritative Guide to Unlocking the Elusive College Market*.

## Peer to Peer Marketing

Enlist previous participants of ACAP programs to promote the program to their peers. Students have points in common with other students and can foster organic conversations about your ACAP that generate real interest. Often times young people are more receptive to messages that come from a peer or friend. Peer-to-peer marketing is not restricted to the high school campus but can be used on social media as well.

"People share, read and generally engage more with any type of content when it's surfaced through friends and people they know and trust."

- Facebook Spokesperson Malorie Lucich

## Market the Experience

Young people are increasingly choosing experiences that resonate with them--they want to be a part of something larger, to experience something grander. The ACAP Program provides them with a unique experience that most high school students do not get. In your marketing, highlight what ACAP allows students to experience. Show them how the program will benefit them. Consider holding ACAP information sessions that allows interaction with students in meaningful and interactive ways. Use the events as a way of forming connections with potential attendees.

## Cross-Platform Marketing

The best approach to marketing to students is to have an integrated marketing plan that utilizes influencers both on and offline. Students are constantly participating in activities on their phones and computers and are huge multi-taskers. However, they still value face-to-face connections highly and recognize the need to unplug.



## ACAP Marketing in Schools

Students spend an average of 33 hours a week in classrooms. Getting teachers, guidance counselors, and even former attendees to place flyers about ACAP in high traffic areas will provide exposure and awareness of the program. Guidance counselors are skilled at steering students into the right programs suited to their interests, abilities, and strengths. They can be great advocates for ACAP. Leaders of clubs such as Future Business Leaders of America and Junior Achievement can also be powerful allies in forming connections with students and encouraging them to apply.

## Recruitment Timeline

Here are different tactics to recruit students for an ACAP Program along with suggested timeframes.

Marketing Tactic	Timeframe Before Program
<b>Engage High Schools</b>	3-6 Months
<b>Mail campaign</b>	3-6 Months
<b>Fliers/Posters</b>	1-4 Weeks
<b>Email campaign</b>	1-3 Months
<b>Social Media Updates</b>	3-6 Months
<b>Peer-To-Peer</b>	1-3 Months
<b>Information Sessions</b>	1-3 Months
<b>Press Release</b>	1-3 Months
<b>Paid local advertising</b>	1-2 Months
<b>Newsletter</b>	3-6 Months
<b>Cold calls</b>	1-2 Months
<b>Networking events</b>	1-3 Months

## Marketing Tips

- Focus on Referral and Direct Solicitation. It remains the most effective mode of advertising.
- Use the recruitment timeline above as a base to ensure that you are diversifying and allocating your marketing resources efficiently and consistently.
- Track metrics for paid advertising if you are going to spend any money on advertising to measure the return on investment.
- Contact your local newspaper and other local media outlets to discuss promotion ideas.
- Leverage community involvement connect with as many high school students and their parents as possible.
- Make your application available online.

# MASTER PLAN TIMELINE

Launching an ACAP program is a large and exciting undertaking. On the following pages are checklists and timelines to help an individual ACAP. This master plan timeline includes items from the [program](#) and [communication](#) timelines.

## 7-10 MONTHS BEFORE

- ☐ Develop a clear mission and vision.
- ☐ Review stakeholder feedback and survey results from previous year, if available, to inform strategy.
- ☐ Set budget for the program, include pre/post activities.
- ☐ Choose program dates, location and venue.

## 1-3 MONTHS BEFORE

- ☐ Begin student communication (see p. 12)
- ☐ Finalize program schedule.
- ☐ Develop staff and volunteer schedules.
- ☐ Confirm facilities and off-site events.
- ☐ Order program materials and supplies.
- ☐ Confirm services from outside vendors.
- ☐ Develop Checklist for the days leading up to the event (see p.15).

## 5-7 MONTHS BEFORE

- ☐ Develop curriculum and other opportunities that may be provided by partners in program schedule

### AFTER PROGRAM

- ☐ Send students post assessment survey immediately following the program.

## 3-5 MONTHS BEFORE

- ☐ Develop descriptions for staff and volunteer positions.
- ☐ Develop student application process.
- ☐ Determine application review process and select reviewers.

# RESPONSIBILITIES CHECKLIST

## UNIVERSITY RESPONSIBILITIES

Activity	Assigned to	Status	Due Date
Obtain Floor Plan for Dorm			
Obtain room keys for dorm rooms			
Obtain meal cards for students			
Obtain venue(s) for non-classroom meetings			
Obtain venue for closing ceremony			
Obtain name of venue for a fun activity – optional			
Obtain name of classroom for the week			
Confirm computer room usage			
Obtain name(s) of accounting instructors			
Obtain names of financial aid reps			
Obtain names of campus tour reps			
Confirm equipment for student presentations			
Confirm equipment for closing ceremony			
Confirm equipment for opening reception			
Obtain location for breakfast during the week			
Obtain venue for the opening reception			
Confirm speakers for the opening reception			
Obtain parking instructions for all activities: <ul style="list-style-type: none"> <li>• Opening Reception</li> <li>• Fun Activity/presentation</li> <li>• Closing luncheon</li> </ul>			

Confirm instructions for use of storing food and beverages in the dorms and/or evening activities			
Confirm use of campus resources for food and beverage (i.e ice machines) on campus during the week			
Confirm storage site on campus for supplies, etc.			

### ACAP Administrative

Activity	Assigned to	Status
Prepare list of requirements for university sponsors		
Assign students to rooms		
Assign counselors to rooms		
Assign students to groups based on males, females		
Assign students and guests to tables for closing ceremony		
Assign students to tables for closing ceremony scheduled		
Obtain names of Participants for Fun Activities scheduled		
Obtain names of students/guests for the closing ceremony		
Rent/Schedule the buses for transportation for Corporate Tour(s) and Outings		
Confirm the tour itinerary to CPA Firm		
Obtain names of volunteers/committee		
Confirm names of sponsors		
Confirm attendance of corporate sponsor reps and ACAP board members to ACAP events that week		
Secure names of counselors		



Obtain bios for counselors		
Prepare ACAP contact list to be used during the week		
Confirm scholarship dollars and sponsors		
Prepare list of available ACAP scholarship dollars and instructions for students		
Prepare financial game for seniors		
Confirm SMU scholarship dollars with SMU reps		
Prepare name badges for students		
Prepare binders for students		
Prepare sample binder for students/parents/counselors		
Prepare forms for admin		
Obtain NABA forms for signatures		
Secure a notary for student/parent orientation		
Provide counselors with NABA National appropriate forms for signature		
Obtain T-Shirts for ACAP		
Obtain snacks for ACAP		
Obtain ACAP banner with new logo		
Prepare written instructions/directions for students, parents, and guests		
Secure photographer and assign duties		
Obtain digital camera for pictures, souvenirs		
Confirm the social outing for the students		

**ACAP Curriculum**

Activity	Assigned to	Status
Prepare example binders for the students		
Obtain technical session speakers as needed		
Confirm speakers for the closing luncheon		
Obtain judges for the student presentations and fun activities (if necessary)		
Give advance assignments to students		
Prepare online survey for the students		
Design prep materials as appropriate for the students		
Notify all concerned of logistics for the orientation		
Prepare materials for orientation		
Prepare spreadsheet of student selections		
Design daily report info for counselors' usage		
Prepare tabulation/summarize student points for awards		
Prepare criteria for student awards		
Prepare schedule for counselors (include free and review time)		

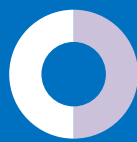
# PROGRAM **TIMELINE**



## SET GOALS

7-10 months before program

- ☐ Develop a clear mission and vision.
- ☐ Review stakeholder feedback and survey results from previous year, if available, to inform strategy.
- ☐ Set budget for the program, include pre/post activities.
- ☐ Choose program dates, location and venue.



## PLAN

5-7 months before program

- ☐ Develop curriculum and other opportunities that may be provided by partners in program schedule.
- ☐ Develop descriptions for staff and volunteer positions.
- ☐ Develop student application process.
- ☐ Determine application review process and select reviewers.



## PROMOTE

3-5 months before program

- ☐ Open student application and promote with key student influencers.
- ☐ Close application and select students.
- ☐ Open and promote volunteer application.
- ☐ Close application and select volunteer
- ☐ Distribute consent forms to volunteers and students.

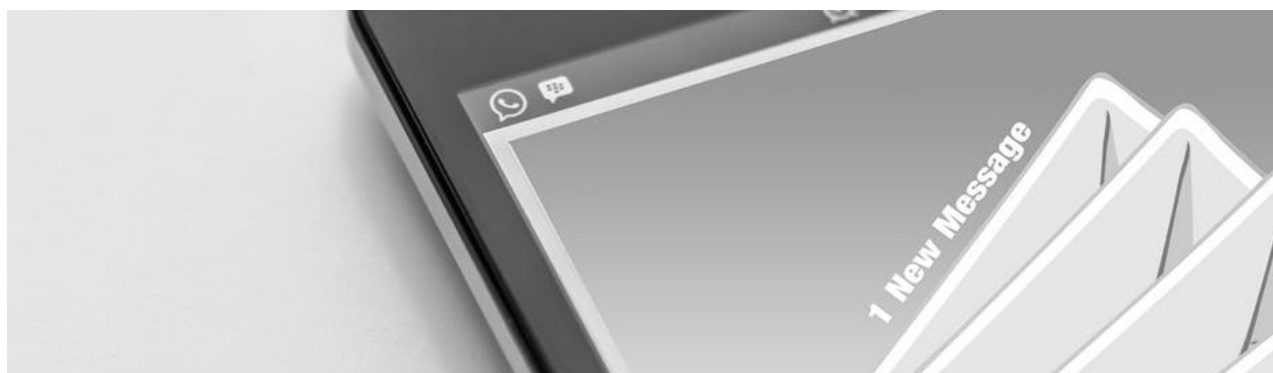


## EXECUTION

1-3 months before program

- ☐ Begin student communication (see p. 21)
- ☐ Finalize program schedule.
- ☐ Develop staff and volunteer schedules.
- ☐ Confirm facilities and off-site events.
- ☐ Order program materials and supplies.
- ☐ Confirm services from outside vendors.
- ☐ Develop Checklist for the days leading up to the event (see p.16).

# COMMUNICATION **TIMELINE**



**Create a communications plan that extends beyond the program event. Pre-work should mentally prepare the students for the program. Post-program engagement should keep the students and their influencers connected to the accounting profession. Therefore, your program should include at least 12 months of planned interaction with the student.**



## PREPARE

1-3 months before program

- ☐ Send a pre-assessment survey.
- ☐ Offer the students interesting reading materials about the program and/or the accounting profession.
- ☐ Send the parents of the students' information about the program giving them an overview of what their children will learn.



## EVALUATE

1-3 months after program

- ☐ Send students post assessment survey Prior to leaving the program.
- ☐ Send the students, parents, key school faculty a summary of what the students learned and the results of the post assessment survey.



## FOLLOW UP

6-9 months after program

- ☐ Send students, parents, and key school faculty a summary listing of area schools with strong accounting programs and the application deadlines.
- ☐ Send students, parents, and key school faculty a summary listing of accounting scholarships for students.



## EXTEND

9-12 months after program

- ☐ Offer students interesting reading materials about the program/and or the accounting profession.
- ☐ Host a reunion reception with students and their parents.
- ☐ Invite students back to talk to new class of summer program participants.

# PROGRAM EVALUATION



Funding is largely dependent on outcomes. Mandatory pre and post surveys are administered by the AICPA Pipeline Project to measure the effectiveness of the program.

## PRE SURVEY

Designed to benchmark key measures of interest in and understanding of the accounting profession and relevant career paths among those who have not yet completed one of the three AICPA Summer Development Programs. The survey was designed to capture qualitative measures of the expectations participants have for the program they were entering.

## POST SURVEY

Designed to benchmark key measures of interest in and understanding of the accounting profession and relevant career paths of those who have completed one of the three AICPA Summer Development Programs. It was also designed to capture self-reported ratings of specific program components and their usefulness. The survey also captures qualitative measures of the benefits, areas to improve, most impactful parts of each program.

# PIPELINE BEST

These best practices provide an overview of core features of diversity pipeline programs and reflect input from the AICPA National Commission on Diversity and Inclusion, CPA state societies, affinity partners such as the National Association of Black Accountants (NABA), the Association of Latino Professionals in Finance and Accounting (ALPFA), Ascend Pan-Asian Leaders and National Council of Philippine American Canadian Accountants (NCPACA), accounting organizations (including those in business, industry and government), community colleges, and universities.

1

## Program Goals and Objectives

Develop a clear mission and vision for the program. A well-defined mission and vision, and the goals and objectives required to achieve them, can help guide program directors when developing program content, setting student-selection criteria, making speaker and other instructor decisions, and forging collaborative partnerships. Overall, programs with proven and stable leadership will be best equipped to effectively carry out the program goals and objectives with consistency from one year to the next. Consider forming an advisory or board of directors and require their active participation with all aspects of the program from program planning to the execution of the program.

2

## Alliances and Partnerships

Expand your program scope and opportunities for success by collaborating with at least one other organization that shares your mission. Fully achieving your program's purpose requires that all partners embrace your goals and have an equally vested interest in the program's long-term success. Partners can include high schools, community colleges and universities as well as accounting organizations and other businesses, affinity groups such as the local chapters of NABA, ALPFA, Ascend and NCPACA, state CPA societies and community organizations.

3

## Program Planning

- Create a realistic plan for a cost-effective, long-term program. Successful and enduring programs require a results-driven fundraising strategy, a sound budgetary process and dependable sources of funding and sponsorships. Costs, financing and scheduling are among the other high-priority planning considerations and should be done early and often.
- Include both pre- and post-program activities in your plan. Pre-program efforts should mentally prepare students for the program, while post-program efforts should keep students and their influencers engaged and interested in the accounting profession after the program concludes. The results are long-term relationships with participants.

## PIPELINE BEST PRACTICES

- Choose a location and venue that maximizes learning and the overall professional-development experience. Whether students and parents or speakers and sponsors, location and venue play a determining role in a program's success. Top selection considerations are space requirements and on-site resources and support. Program-specific considerations include:
  - For high school and community college students, a program held on a college campus gives students the benefit from a first-hand college experience, which can encourage them to further pursue their accounting studies.
  - For university students, a program held at a hotel or on-site at a CPA firm or other business can expand students' perspectives beyond college life and provide an inside look into the business environment.

### Communications and Marketing

4

- Build and maintain a communications and marketing platform focused on informing and engaging key influencers. Engagement efforts can be targeted toward high school, community college and university guidance counselors and other faculty who actively guide students' career decisions. Other influential audiences include parents, program alumni, youth groups, religious institutions, PTAs/ PTOs, accounting organizations, profession affinity groups and the AICPA.
- Begin communications and marketing outreach approximately one year pre-program. By launching your student-engagement efforts one year before the program starts, you can reach top students before they begin to consider other options such as summer programs or internships. Consider using Facebook, Instagram, Snapchat, or the latest trending social media outlets that will assist with effectively achieving your communications and marketing goals.

### Application Process

5

- Create a student-friendly and objective application process. An application process that is organized, seamless and straightforward, and demonstrates your commitment to students from program start to finish, is a premium among students who are choosing from a rising number of program applications.
- Open the application period approximately six to eight months pre-program for a program that ranges in size from 20 to 40 participants. You may scale this application process up or down depending on the size and complexity of your program.

❖ *For summer programs, an application process that begins in the early fall allows you to attract the most in-demand students before they are recruited by other organizations offering summer programs/internships.*

## PIPELINE BEST PRACTICES

6

### Selection Process

- Select the most highly qualified students. Selection criteria such as GPA (3.2 minimum), PSAT/SAT scores, transcripts, essays, recommendations, and leadership and service experiences are the hallmarks of a competitive selection process. Application reviews should consider all appropriate criteria, while keeping academic excellence, as demonstrated by the student's GPA and standardized test scores, a leading criterion.
- Enlist the assistance of the admissions office of the college hosting the program. Student selection insights from the host college not only bring an additional academic perspective to the selection process but they also help identify students who are likely to be successful at the college.

7

### Program Content

- Develop a program offering a blended learning approach. Content that engages and intellectually challenges students with a variety of different topics can deliver an incredibly rewarding program. It further encourages students to continue their accounting studies and obtain the CPA designation, builds academic success, and prepares them for the workforce. Career-development training, and personal and professional growth opportunities are additional advantages.
- Present content in several creative ways. Programs should allow for a balanced mix of small group collaborative activities, panel discussions/lectures featuring successful young CPAs, experiential learning and individual self-reflection opportunities. Leverage professional organizations and firms for applicable content.
- Tap into the professional network of a wide range of organizations when identifying speakers and volunteers. State CPA societies, accounting organizations, university accounting/business departments and the AICPA are invaluable sources of speaker and volunteer information.
- Achieve a diverse mix of program speakers and volunteers. Dynamic, engaging, and inspirational speakers with different experiences, track records for inclusion and the ability to relate to underrepresented minority students, supported by dedicated volunteers, are strong program differentiators. Powerful stories of the challenges and successes speakers have encountered on their journey to becoming a CPA can motivate students long after the program concludes.

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### Program Management

- Confirm that all program participants know their roles and responsibilities. Informing program participants – from speakers, volunteers, state CPA society/AICPA members and sponsors to program directors, students, parents and the host college or hotel – of how they contribute to the program's success helps meet program goals and expectations. Orientation sessions, one-on-one meetings and roundtable discussions are among the ways participants can be prepared for the program. Where applicable, a signed agreement to their commitment to the program policies and requirements by the student and parents/guardian is helpful.



- Fully understand all program expectations, and legal and health requirements. Student and other participant safety, and your protection against liability, are critical program priorities. By consulting with legal counsel and/or a risk-management professional, you can learn the responsibilities and liabilities involved in offering the program.
- Take a comprehensive approach in your due diligence. Program practices and policies should address issues ranging from hold harmless agreements, liability and health insurance, and dietary restrictions to student photo releases, criminal and other background checks, and special accommodations.

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### Program Evaluation

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- Conduct timely and effective program evaluations. A framework for continuous program improvement and accountability is best created using feedback from all participants and stakeholders. Feedback can be obtained at the end of each day or at the close of the program.

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### Tracking Alumni and Maintaining Relationships

10

- Stay up-to-date on program alumni's academic and career progress. The services and support students receive during the program can continue post-program through ongoing connection points between the program director and student alumni. Connection communication strategies, which can maintain students' commitment to studying accounting and obtaining the CPA designation include social media platforms such as Facebook, Instagram, LinkedIn, Snapchat or the latest trending social media outlets, program alumni pages, mentoring relationships, regular e-mail communications with other participants, and annual reunions.
  - Measuring success. A crucial element of tracking students is the measurement of return on investment information to help with your business case to stakeholders for continued support. Measure students' progress once they have been exposed to your program's offerings by documenting their success in pursuing an accounting degree, completing an accounting degree and their successful completion of the CPA exam. Tracking and documenting measures of success provides your program with the credibility it needs to convince stakeholders to fully support the program.
- 
- Ongoing engagement. An intentional effort to reach program alumni with multiple touch-points during the year proves to be successful for ongoing engagement. One way to keep program alumni engaged is to offer them opportunities to serve as mentors, coaches, panelists, or presenters at future programs.

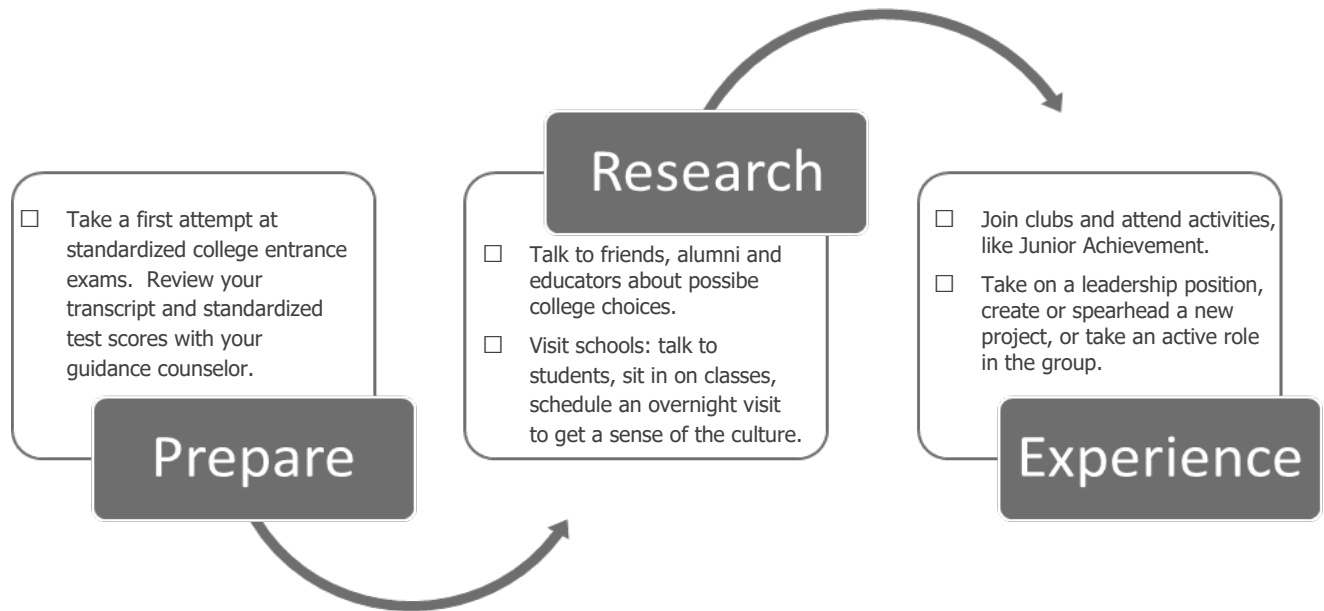
## OTHER CONSIDERATIONS

ACAP programming is designed to push students to achieve greater academic excellence because of the motivation and college/career planning associated with early accounting and finance career aspiration. The program is based on the following curricular foundations.

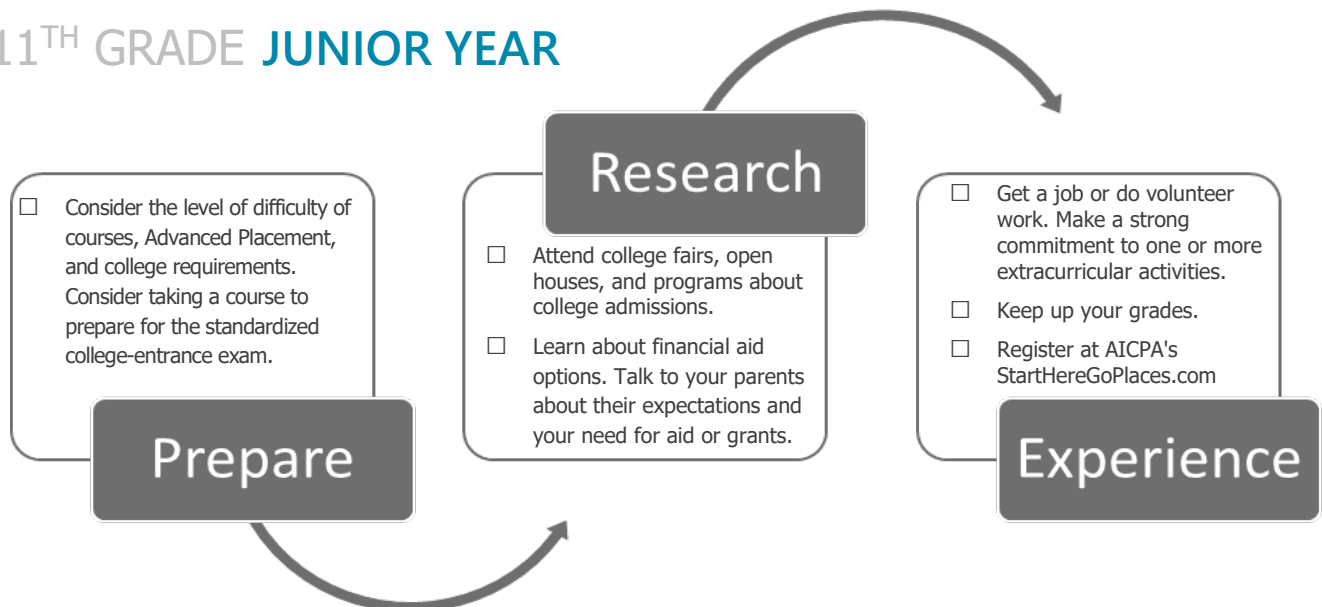
- **Careers:** Accounting and finance careers are a meaningful and worthy of the time and investment necessary to succeed.
- **Access:** Additional investments need to be provided to help students from underserved communities find their place in accounting and finance professions.
- **Enrollment:** College is the most direct path to successful entrance into accounting and finance careers.
- **Achievement:** Accounting and finance success is predicated on the competence and attention to detail that obtaining high scores and academic success.
- **Key Courses:** Accounting and finance career success is built in major part by acuity in math and critical thinking.
- **College Admission Preparation:** Students who understand how to gain admission to college and finance college are more likely to enroll.
- **Scholarship and Grant Attainment:** The ease of financing a college education has a direct correlation to college completion rates.
- **SAT and ACT Scores:** High SAT and ACT scores increase a student's competitiveness for college admission and non-need-based scholarships.
- **Professional Development:** Early awareness of professional expectations and comfort in professional cultures can have a direct effect on student confidence, self-awareness, and self-perception.
- **Dexterity:** Collaboration, innovation, and technological dexterity are critical to success in any career field.

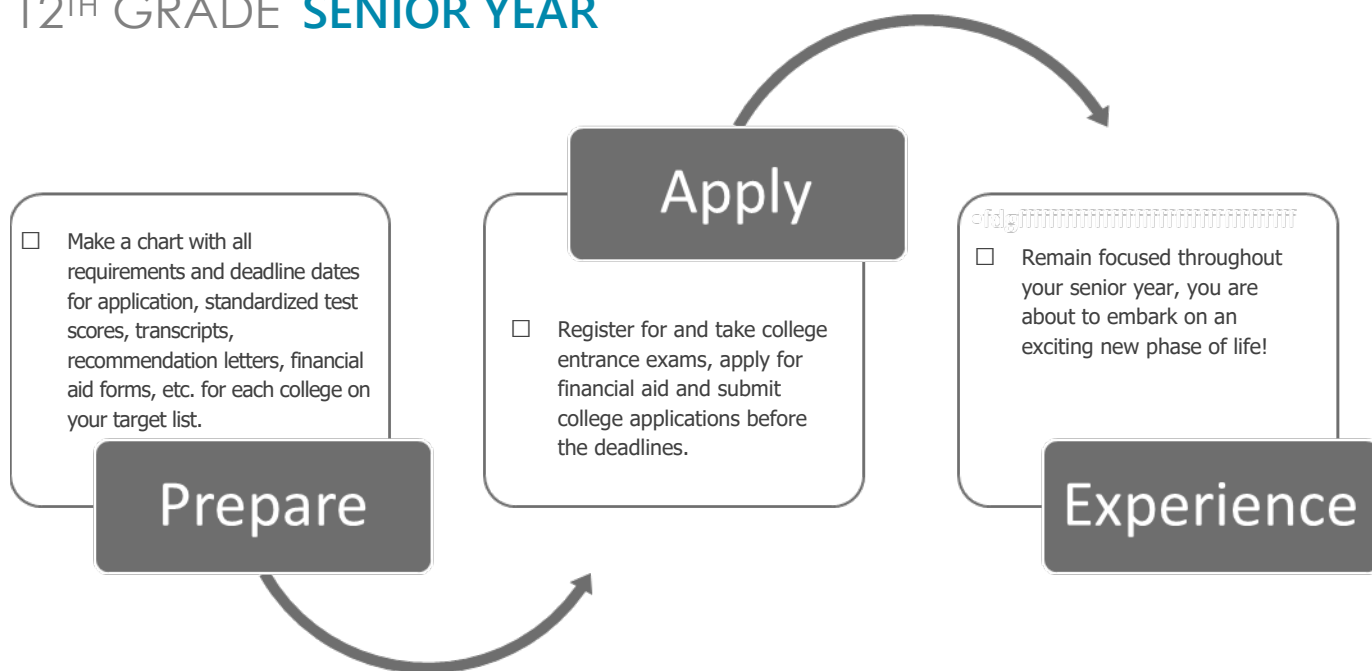
# COLLEGE PREP PATH

## 10<sup>TH</sup> GRADE SOPHOMORE YEAR



## 11<sup>TH</sup> GRADE JUNIOR YEAR



12<sup>TH</sup> GRADE **SENIOR YEAR**COLLEGE **FRESHMAN YEAR**

1. **Get Organized.** Buy an organizer, use an app, or get a big wall calendar — whatever it takes for you to know when assignments are due.
2. **Find the ideal place to study.** It may be your dorm room or a cozy corner of the library but find a place that works best for you to get your work done and avoid as many distractions as possible.
3. **Go to class.** Avoid the temptation to skip class. Besides learning the material by attending classes, you'll also receive vital information from the professors.
4. **Meet with your professors.** Professors schedule office hours for the sole purpose of meeting with students — take advantage of that time.
5. **Seek a balance.** College life is a mixture of social and academic happenings. Don't tip the balance too far in either direction.
6. **Get involved on campus.** You'll make new friends, learn new skills, and feel more connected to your school. Start with your school's NABA chapter.
7. **Join the State CPA Society.** Most state societies have student membership.

Adapted from 2017 "Dallas ACAP Newsletter: Preparing for College" and  
<https://www.livecareer.com/quintessential/first-year-success>

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*“Lifting As We Climb”*

For more information about the  
Accounting Career Awareness Program, visit:  
<https://www.nabainc.org/acapsummerprogram>

