



## PHILANTHROPY CHAIRMAN FIRST 30 DAYS CHECKLIST

Congratulations on your new role as Philanthropy Chairman! Thank you for your commitment to Pi Kappa Phi and The Ability Experience and for ensuring the success of your chapter. There is a lot to do! While this is not an exhaustive list to govern your entire term, it can get you started on the tasks you will need to complete during your first 30 days in office.

### COMPLETE TRANSITION PAPERWORK

Share your contact information with the Secretary, so he can update chapter officer information via Chapter Gateway and submit similar paperwork for the IFC and university.

Contact your Regional Director of Chapter Services at The Ability Experience to have your chapter's online profile updated with you as the team captain. He can be contacted at [chapterservices@abilityexperience.org](mailto:chapterservices@abilityexperience.org).

### MEET WITH YOUR CONTACTS

- Meet with the outgoing Philanthropy Chairman to transition your roles.
  - Review the chapter's current written plan and any upcoming projects/events
  - Discuss successes, challenges and opportunities
  - Discuss the status of your local volunteer relationship
  - Gather his suggestions on how to lead the chapter
  - Ask if all funds have been transferred over from previous events
  
- Meet with the Archon.
  - Discuss your role in the chapter and your fundraising, awareness, and volunteerism goals for the year.
  - What does the committee structure look like and who are the members.
  
- Contact your Philanthropy Advisor and introduce yourself. Meet with your Chapter Advisor if you do not have a Philanthropy Advisor.
  - Set up a time to meet with your philanthropy advisor in the next two weeks.
  - Provide a copy of the chapter's written philanthropy plan.
  - If you need assistance recruiting a philanthropy advisor for your chapter, contact your Regional Director of Chapter Services.
  
- Contact your volunteer relationship organization and introduce yourself.
  - Set up a time to meet with them in the next two weeks.
  - Provide information on upcoming philanthropy events.
  - Review any upcoming volunteer opportunities.

- Contact your [Regional Director of Chapter Services](#) at The Ability Experience and introduce yourself.

## REVIEW THE CHAPTER'S STATUS

- Obtain and review copies of your chapter's current:
  - Constitution and Bylaws;
  - Strategic Plan;
  - Budget;
  - Scholarship Report;
  - Seven Objectives of Chapter Excellence Report;
  - Events Calendar and the Campus Academic and Activities Calendar; and
  - Volunteer Relationships and/or Philanthropy Plans.
- Log in to chapter gateway at <http://gateway.pikapp.org> and review your chapter's service hours total and fundraising total. If your totals do not reflect the appropriate amounts, contact [chapterservices@abilityexperience.org](mailto:chapterservices@abilityexperience.org)
- Log in to your participant center and update the chapter's fundraising profile as necessary. Your participant center can be found [here](#).
- Make signature changes for checking account at the bank (if applicable).

## LEARN THE ROPES

- [Event Planning Guide](#)
- [Events with Alcohol Resource Guide](#)
- [Written Program template](#)
- [Best Buddies Partnership Guide](#)
- Review the [Philanthropy Chairman resources](#) on the Resource Library
- Review the [Risk Management resources](#) on the Resource Library
- Review the [Seven Objectives of Chapter Excellence](#)