



## HISTORIAN FIRST 30 DAYS CHECKLIST

Congratulations on your new role as historian, and thank you for your commitment to Pi Kappa Phi 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.

### MEET WITH YOUR CONTACTS

- Meet with your outgoing historian to transition your roles.
  - Obtain a transition binder if one was provided.
  - Review the chapter's current Strategic Plan and any upcoming projects.
  - Analyze the strategy, effort and results of the previous year's alumni relations program.
  - Discuss successes, challenges and issues you might expect during your term of office.
- Contact your alumni relations advisor and introduce yourself.
  - Review the chapter's current Strategic Plan and any upcoming projects.
  - Analyze the strategy, effort and results of the previous year's alumni relations program.
  - Discuss successes, challenges and issues you might expect during your term of office.
- Contact your chapter advisor and introduce yourself.
  - If you do not have an alumni relations advisor, work with your chapter advisor to identify and recruit one.
- Contact your fraternity/sorority life advisor and introduce yourself.
- Contact the local alumni chapter/housing corporation president and introduce yourself. (Contact the [senior director of alumni engagement](#) if you need that contact information.)
  - Provide him with your contact information and schedule a meeting with him in the next two weeks.
  - Discuss any current issues or initiatives between the chapter and alumni group.
  - Review current alumni relations plans and any upcoming projects.
  - Analyze the strategy, effort and results of the previous year's alumni relations efforts.
  - Discuss successes, challenges and issues you might expect during your term of office.
- Contact your university's director of alumni services and introduce yourself.
  - Set up a time to meet with them in the next four weeks.
  - Provide them with your contact information.
  - Ask how the chapter can advance the university's alumni relations vision.
  - Ask for feedback on your ideas.

## REVIEW THE CHAPTER'S STATUS

- Obtain and review copies of your chapter's current:
  - Constitution and Bylaws
  - Strategic Plan
  - Budget
  - Seven Objectives of Chapter Excellence Report
  - Events Calendar and the Campus Academic and Activities Calendar
  - Alumni Relations Program
- Collect copies of past newsletters/communication the chapter or the alumni organization sends.
- Collect and audit historical materials such as scrapbooks, pictures and other memorabilia.
- Review your local chapter's websites and social media accounts, the guidelines for content, and the alumni chapter's website.

## LEARN THE ROPES

- [The Gold Book](#) of Pi Kappa Phi
- Review the Founders' Report
- Review Historian resources in the [Resource Library](#)
- [Risk Management Resources](#) (available under the Risk Management tab of the Resource Library)
- Handbook/manual of student organization rules and regulations for your campus
- IFC constitution, bylaws and risk management policy