



SECRETARY FIRST 30 DAYS CHECKLIST

Congratulations on your new role as secretary! 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

- Work with the outgoing secretary to complete and submit the “Update Officer Information” to National Headquarters via Chapter Gateway (gateway.pikapp.org). [**Membership Management → Actions → Update Officer Information**].
- Update contact information on your local chapter website and social media sites.
- Submit updated officer contact information to the appropriate campus entities (e.g., Student Activities Office, Fraternity/Sorority Life Office, IFC, etc.).
- Send updated officer contact information to other appropriate fraternity entities (e.g., chapter advisor, alumni chapter, housing corporation, etc.).
- Update your chapter’s Green Report via Chapter Gateway (gateway.pikapp.org). [**Membership Management → Actions → Green Report**].

MEET WITH YOUR CONTACTS

- Meet with the outgoing secretary to transition your roles.
 - Collect electronic and hard copies of chapter records, paperwork, files, etc.
 - Analyze filing system, major contacts, chapter documents, duties and communications processes.
 - Review the chapter’s current Strategic Plan and any upcoming projects.
 - Discuss successes, challenges and issues you might expect during your term of office.
 - Obtain the key or combination to the chapter mailbox and/or IFC box.
 - Transition administrative privileges including username and passwords for the chapter’s website, listserv, email accounts and social media account.
- Contact the following individuals and introduce yourself:
 - Chapter advisor;
 - Housing corporation president (if applicable);
 - Local alumni chapter president; and
 - [Director of chapter services or chapter success manager](#)
- Attend the officer transition retreat with the incoming executive council to prepare for the year.

REVIEW THE CHAPTER’S STATUS

- Obtain and review copies of your chapter’s current:

- Membership Roster on Chapter Gateway [[Membership Management](#) → [Reports](#) → [Current Chapter Roster](#)]
 - Constitution and Bylaws
 - Strategic Plan
 - Budget
 - Most recent Consultant Visit Report from [director of chapter services or chapter success manager](#)
 - Founders' Report on Chapter Gateway [[Administrative Items](#) → [Founders' Report](#) → [Reports](#) → [Seven Objectives of Chapter Excellence Report \(By Term & Year\)](#)]
 - Events Calendar and the Campus Academic and Activities Calendar
- Obtain a copy of the awards application from IFC, the Greek Life Office, the Student Activities Office and/or other campus departments that recognize student achievement.
 - Inventory chapter supplies and merchandise and order as needed.

LEARN THE ROPES

- [A Year in the Life of a Pi Kappa Phi Chapter](#)
- [Chapter Gateway](#), contact the [Director of Fraternity Services](#) with any questions
- Review the Pi Kappa Phi [Brand Guidelines](#)
- [The Gold Book](#) of Pi Kappa Phi
- Review the Founders' Report
- Review secretary resources in the [Resource Library](#)
- [Risk Management Resources](#) (under the Risk Management Chairman tab of the Resource Library)
- Handbook/manual of student organization rules and regulations for your campus
- IFC constitution, bylaws and risk management policy
- Review any campus fraternity/sorority life standards or awards programs