President’s Checklist

General To-Do List

☐ Build a support system by establishing connections with others
  o It is impossible to know and do everything by yourself. Remember you have resources that you can use.

OFSL Staff Members
Interim Director: David Pittman (david.pittman@duke.edu) Program Coordinator: Jessica Emig (jessica.emig@duke.edu)
NPHC & MGC Advisor: TBA Graduate Assistant: Grant Bigman (grant.bigman@duke.edu)
Graduate Assistant: Alison McLaughlin (alison.mclaughlin@duke.edu)

☐ Collect Resources for Transition
  o Obtain your Officer Manuals
  o Visit your Inter-/National Headquarters Website
  o Interview your predecessor and obtain any necessary files/folders from him/her
  o Gather contact Information for your resources
  o Transfer all accounts (ie. DukeGroups, bank, etc.) to new officers
  o Meet with your Advisors

☐ Know the Expectations
  o Develop expectations for yourself and for your team
  o Discuss expectations of yourself with advisors and your team

☐ Double Check your Predecessor
  o Complete a thorough review of your chapter’s current status and ensure everything is up-to-date (ie. Accounts, websites, contact information, etc.)
  o Identify and resolve any outstanding responsibilities and unfinished business
  o Balance your budget
  o Gather feedback from current members and former officers
  o Prepare yourself to develop a plan of action

☐ Create your Vision
  o Determine your vision
    ▪ What’s your vision for your chapter over the next year as President?
  o Set your goals

☐ Learn the Ropes
  o Learn and understand the policies and procedures related to your position
    ▪ NC State Laws: Hazing Law; Alcohol Distribution, Sale, & Use Laws
    ▪ Campus Policies: Academic Policies; Alcohol & Drug Policy; Duke Community Standard in Practice (for Students & Organizations); HDRL Policies; New Member Education Guidelines, Sexual Assault & Harassment Policies; UCAE Student Organization Policies (ie. Contracts, Programming, Event Registration, Planning, & Management)
    ▪ National/International Organization Policies: Alcohol & Drug Policy; Risk Management Policies
  o Review Important Dates and ensure that you delegate to your team

☐ Build your skills
  o Delegation, Relationship Building, Public Speaking, Listening, Organization, Time Management, Motivating Others, Networking, Leadership, Reflection

Duke Specific To-Do List

☐ OFSL Information
  o Check our website and ensure that your websites and specific information is updated and accurate
  o Know where your chapter’s mailbox is (OFSL – 036 Bryan Center)
    ▪ Address for your Chapter: Individual/Organization’s Name
      036 Bryan Center, Box 90840
      Durham, NC 27708-0840

greek@duke.edu 919.684.9401
Office of Fraternity & Sorority Life (OFSL)
President’s Checklist

☐ Updated Roster of Members
  o Ensure that OFSL has an updated roster (Excel document with first name, last name, UniqueID, and email)
    ▪ If any initiated member deactivates/disaffiliates or new member resigns, let OFSL know immediately

☐ Greek GPA Confidentiality Agreement
  o Ensure that your President AND Scholarship Chair sign and submit the confidentiality agreement to access your chapter’s grades (ONLY these officers should have access and they are NOT permitted to share grades with ANY other individuals)

☐ Mandatory UCAE Student Organization Training
  o Make sure that the President and the Treasurer both complete the online training. Review the PowerPoint and Policies then take the Training Quiz (https://studentaffairs.duke.edu/ucae/finance/student-organization-finance)
  o Know your Fund Code – Obtain from UCAE Business & Finance Office

☐ DukeGroups
  o Update DukeGroups with appropriate officers (President, Treasurer, VP of Recruitment & Membership)
  o Ensure that DukeGroups has an updated roster, Constitution/Bylaws, and organizational information
  o Re-register chapter on DukeGroups in August

☐ Officer Information for HDRL (*Only Applicable for those Chapters that have a Section)
  o Update HDRL with the contact information of your President, Vice President, Treasurer, and Communications Coordinator
  o If you have a section on campus, you can use HDRL House Councils funds to plan programs and/or purchase necessary items. In order to access those funds, UCAE needs to know the updated names and information for those individuals

☐ Duke Greek Community Standards (DGCS) Accreditation Program
  o Review the DGCS Guidelines for the calendar year and start preparing your submission. Delegate to other members and work on it THROUGHOUT your term. The purpose is to ensure your chapter is operating effectively.

Other Helpful Information

☐ Chapters

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<tr>
<th>Interfraternity Council</th>
<th>National Pan-Hellenic Council</th>
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<tr>
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☐ Panhellenic Association

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<td>Zeta Tau Alpha</td>
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☐ Campus Resources

- Academic Advising Center: 919.684.6217
- University Center Activities & Events (UCAE): 919.684.4741
- Center for Multicultural Affairs (CMA): 919.684.6756
  - Career Center: 919.660.1050
  - Duke Alumni Association: 919.684.5114
  - HDRL – Housing Assignments: 919.684.4303
  - HDRL – East Campus Office: 919.684.5320
  - International House (I-House): 919.684.3585
  - Mary Lou Williams Center for Black Culture: 919.684.3814
  - Office of Student Conduct: 919.684.6938
  - Student Wellness Center (DUWELL): 919.681.8421
- Peer Tutoring: 919.684.8832

Center for Leadership Development & Social Action (CLDSA): 919.684.4740
- Center for Sexual & Gender Diversity (CSGD): 919.684.2543
- Counseling & Psychological Services (CAPS): 919.660.1000
  - HDRL – Dining: 919.660.3900
  - HDRL – Central Campus Office: 919.384.5813
  - HDRL – West Campus Office: 919.684.5486
  - Jewish Life at Duke: 919.684.6422
  - Muslim Life at Duke: 919.613.6780
  - Student Health Services (SHS): 919.684.9355
  - Women’s Center: 919.684.3897

- greek@duke.edu
- Office of Fraternity & Sorority Life (OFSL) 919.684.9401