

## MID-YEAR LEADERSHIP CONFERENCE

# PRE-CONFERENCE CHECKLIST

The following checklist is a group of items your Executive Council should prepare and complete ahead of the Virtual Mid-Year Leadership Conference.

This checklist has been broken down into various categories which will represent efforts expected from each member of your council. We understand that the role of your Chapter's council may vary from others so these are suggestions that should be assigned by your leadership.

## OPERATIONAL

- Complete the Chapter Officer Transition Training
  - + Access within the Plaid Learning Management System (LMS)
- Complete the Self-governance Training
  - + Access within the Plaid Learning Management System (LMS)
- Review Chapter Officer Manual
  - + [Chapter Officer Manual](#)
- Establish access within your ChapterSpot account
  - + Login at [portal.sigmapi.org](http://portal.sigmapi.org) to establish access and review roster
- Review Chapter Report Card
  - + [Chapter Report Card](#)
- Review Sigma Pi Policies, Constitution, and Bylaws
  - + [What We Stand For](#)
- Sign the Risk Management Agreement
  - + Click [HERE](#) to review and sign the agreement
- Familiarize yourself with Chapter's ritual equipment (Confirm you have all items)
  - + Click [HERE](#) to review your current ritual inventory
- Review Crisis Management Plan and Media Protocol
  - + [Crisis Management Poster](#)
- Plan for updated roster dates (June 15th, September 15, January 15)
  - + Click [HERE](#) or refer to the most recent "Welcome Packet"

## RELATIONSHIP

- Review the Executive Office point of contacts
  - + Click [HERE](#) or refer to the "Executive Office Staff" section under "Fraternity" on [sigmapi.org](http://sigmapi.org)
- Meet with Chapter Advisor (Province Archon where necessary)
  - + Meet with your CA during the shadow process (prior to your official transition)
- Meet with campus office of Fraternity and Sorority Life (OFSL) if applicable
  - + Meet with your OFSL point of contact for introductions during the shadow process (prior to your official transition)

## FINANCIAL

- Change Chapter bank account over to relevant successor
  - + Refer to your local bank – typically, the former Sage and Third Counselor will accompany the newly elected Executive Council members as bank account information is removed and updated
- Review previous year's budget
  - + Refer to your Chapter's most recent budget – Does your budget account for semi-annual dues, local dues, committee expenses, national event expenses, and Chapter savings
- Establish access within your GreekBill account
  - + Refer to your Sigma Pi Portal Dashboard where you will be able to access your Chapter's GreekBill account

## PROGRAMMING

- Review the New Member Experience
  - + Click [HERE](#) or refer to the New Member Experience Accompanying Guide in the Plaid LMS
- Review upcoming events and programs
  - + Click [HERE](#) or refer to the "Events" section of [sigmapi.org](http://sigmapi.org)