

THE TRIPP-JONES FAMILY

NEW OFFICER

ORIENTATION CHECKLIST

Your first-week quick-start card

— keep this at your desk

Welcome to Your New Role!

This one-page checklist gets you started fast. For full details on each item, refer to the Officer Onboarding & Transition Handbook. Your goal in the first week: get access to everything you need and introduce yourself to the team.

Week 1 — Do These First

<input checked="" type="checkbox"/> Action	
<input type="checkbox"/>	Receive and sign the Transition Acknowledgment Form from the outgoing officer
<input type="checkbox"/>	Confirm you have access to all accounts and files for your role (see Accounts Log in Handbook)
<input type="checkbox"/>	Read the Constitution & Bylaws — focus on the Article for your specific role
<input type="checkbox"/>	Read the Officer Onboarding Handbook (the full version of this checklist)
<input type="checkbox"/>	Text or call every other Executive Committee member to introduce yourself
<input type="checkbox"/>	Add all key family dates to your personal calendar (see Key Dates below)
<input type="checkbox"/>	Confirm the next Executive Committee meeting date with the President

5 Things to Know Right Now

Item	Detail
1. Your constitutional duties	Read your Article in the Constitution before your first meeting.
2. Who to call with questions	President: _____ Secretary: _____
3. When the next meeting is	Date: _____ Platform/Location: _____
4. Where the family records are stored	Ask the Secretary for access to the shared drive.
5. The family's top current priority	Ask the President in your first conversation.

Key Dates to Know

Date	Event
5th of each month	Treasurer's financial statement due — distributed by President
Quarterly	Executive Committee meeting (set by President)
June 1 (election years)	Election Committee convenes
June 15 (election years)	Nomination deadline
July	Annual Family Reunion — no later than 3rd weekend

Date	Event
Last day of reunion	Annual financial audit by District Leaders
December	Annual budget prepared for coming fiscal year
Within 30 days of leaving office	Transfer all materials to incoming officer

Your Role at a Glance

My Role: _____
My Term: _____ to _____ Elected or Appointed: _____
My Constitutional Article: Article ____ My Primary Duty: _____

Key Contacts

Role	Name Phone / Email
President	_____ _____
Vice President	_____ _____
Secretary	_____ _____

Role	Name Phone / Email
Treasurer	<hr/> <hr/>
Parliamentarian	<hr/> <hr/>