

THE TRIPP-JONES FAMILY

OFFICER ONBOARDING & TRANSITION HANDBOOK

A practical guide for incoming and outgoing Tripp-Jones Family officers

1. Purpose

This Handbook supports smooth leadership transitions by providing every incoming officer with a clear picture of their role, what they receive from their predecessor, and what they should accomplish in their first 30 days. It is grounded in Article 10, Section 2 of the Constitution, which requires all outgoing officers to transfer materials within 30 days of leaving office.

2. Outgoing Officer Responsibilities

Every departing officer must complete the following before or within 30 days of leaving office. The incoming officer should confirm receipt of each item.

2.1 Materials to Transfer

| <input checked="" type="checkbox"/> | Item to Transfer |
|-------------------------------------|--|
| <input type="checkbox"/> | All meeting minutes and official records for your term |
| <input type="checkbox"/> | Family Directory (current, updated copy) |
| <input type="checkbox"/> | All email account credentials related to the role |
| <input type="checkbox"/> | All social media login credentials (if applicable to role) |
| <input type="checkbox"/> | Family website access credentials (if applicable to role) |
| <input type="checkbox"/> | All financial records, receipts, and bank statements (Treasurer) |
| <input type="checkbox"/> | Reunion planning files and vendor contacts (President / VP) |

| <input checked="" type="checkbox"/> Item to Transfer |
|---|
| <input type="checkbox"/> Historical archives, photographs, and genealogical files (Historian) |
| <input type="checkbox"/> Any contracts, agreements, or ongoing commitments signed during term |
| <input type="checkbox"/> Hard copies of signed documents and prior constitutions |
| <input type="checkbox"/> Any equipment or supplies purchased with family funds |

2.2 Transition Meeting

The outgoing officer shall schedule at least one transition meeting with the incoming officer to walk through open items, ongoing projects, and institutional knowledge not captured in documents. This meeting should occur within 14 days of election results being certified.

2.3 Transition Acknowledgment

Both the outgoing and incoming officer shall sign the Transition Acknowledgment form (Section 8 of this Handbook) confirming that all required materials have been transferred.

3. Incoming Officer — First 30 Days

Use the checklists below to guide your first month in office. Items are organized by role.

3.1 All Officers (First 30 Days)

| <input checked="" type="checkbox"/> Action |
|--|
| <input type="checkbox"/> Sign and return Transition Acknowledgment (Section 8) |

| <input checked="" type="checkbox"/> Action |
|--|
| <input type="checkbox"/> Review the Tripp-Jones Family Constitution and Bylaws in full |
| <input type="checkbox"/> Review this Onboarding Handbook |
| <input type="checkbox"/> Update any login credentials received from outgoing officer |
| <input type="checkbox"/> Introduce yourself to all other Executive Committee members |
| <input type="checkbox"/> Confirm attendance at the next scheduled Executive Committee meeting |
| <input type="checkbox"/> Review meeting minutes from the prior two years |
| <input type="checkbox"/> Identify any open action items from previous officer |
| <input type="checkbox"/> Read the Family Directory — familiarize yourself with district membership |

3.2 President

| <input checked="" type="checkbox"/> Action |
|---|
| <input type="checkbox"/> Review reunion host schedule and confirm which district is next in rotation (Art. 29, Sec. 10) |
| <input type="checkbox"/> Contact current reunion host (if selected) and schedule monthly check-in cadence |
| <input type="checkbox"/> Confirm Treasurer is maintaining monthly financial statements |
| <input type="checkbox"/> Schedule first Executive Committee meeting within 60 days of taking office |
| <input type="checkbox"/> Confirm Social Media Officer appointment (or plan to appoint one) |
| <input type="checkbox"/> Review any outstanding disputes or complaints |

| <input checked="" type="checkbox"/> Action |
|---|
| <input type="checkbox"/> Review contingency plans for reunion host cancellations (Art. 14, Sec. 11) |
| <input type="checkbox"/> Set priorities for the term and share with Executive Committee |

3.3 Vice President

| <input checked="" type="checkbox"/> Action |
|---|
| <input type="checkbox"/> Meet with President to understand term priorities and assigned responsibilities |
| <input type="checkbox"/> Review Bylaws Article 1 (Order of Succession) and understand succession procedures |
| <input type="checkbox"/> Confirm familiarity with reunion planning process (Art. 15, Sec. 3) |
| <input type="checkbox"/> Review all ongoing Executive Committee projects |
| <input type="checkbox"/> Ensure contact information for all District Leaders is current |

3.4 Secretary

| <input checked="" type="checkbox"/> Action |
|--|
| <input type="checkbox"/> Confirm receipt of all prior meeting minutes and official records |
| <input type="checkbox"/> Obtain and update the Family Directory |
| <input type="checkbox"/> Set up system for tracking correspondence and meeting agendas |
| <input type="checkbox"/> Confirm email distribution list is current |
| <input type="checkbox"/> Familiarize yourself with absentee ballot and election records procedures |

| <input checked="" type="checkbox"/> Action |
|---|
| <input type="checkbox"/> Confirm storage location for official family records |
| <input type="checkbox"/> Set reminder for 7-day agenda distribution before each reunion (Art. 27, Sec. 2) |

3.5 Treasurer

| <input checked="" type="checkbox"/> Action |
|---|
| <input type="checkbox"/> Confirm access to all family bank accounts |
| <input type="checkbox"/> Reconcile current account balances against records received |
| <input type="checkbox"/> Confirm check-signing authority setup (Bylaws Art. 12: Treasurer + President co-sign over \$500) |
| <input type="checkbox"/> Review prior year's budget and actual expenditures |
| <input type="checkbox"/> Prepare draft budget for current term and present to Finance Committee |
| <input type="checkbox"/> Confirm monthly financial statement schedule (due to President by the 5th of each month) |
| <input type="checkbox"/> Verify all outstanding receipts and reimbursements are resolved |
| <input type="checkbox"/> Confirm date of annual audit with President (no later than last day of reunion, Art. 28 Sec. 7) |

3.6 Parliamentarian

| <input checked="" type="checkbox"/> Action |
|---|
| <input type="checkbox"/> Obtain a current copy of Robert's Rules of Order |

| <input checked="" type="checkbox"/> Action | |
|--|--|
| <input type="checkbox"/> | Review the Constitution and Bylaws for all procedural rules |
| <input type="checkbox"/> | Familiarize yourself with quorum requirements (Art. 11, Sec. 2; Art. 27, Sec. 3) |
| <input type="checkbox"/> | Review any past disputes or procedural rulings from prior term |
| <input type="checkbox"/> | Prepare a Robert's Rules quick-reference card to use at meetings |

4. Role Summaries

Quick-reference summaries of each officer's primary responsibilities. For full duties, see the relevant article in the Constitution.

| Officer | Primary Responsibilities |
|----------------|--|
| President | Leads the family organization; ensures annual reunion occurs; presides over business meetings; oversees finances; external representative. (Art. 14) |
| Vice President | Supports the President; assumes President role if vacancy occurs; assists with reunion planning. (Art. 15) |
| Secretary | Maintains records and minutes; manages Family Directory; handles correspondence; documents elections. (Art. 16) |

| Officer | Primary Responsibilities |
|----------------------|---|
| Treasurer | Manages the Family General Fund; budgets, bookkeeping, reporting, and compliance. Monthly financial statements. (Art. 17) |
| Parliamentarian | Ensures all meetings follow Robert's Rules and the Constitution; mediates procedural disputes. (Art. 18) |
| Family Historian | Preserves family history, genealogy, archives, oral histories; presents at reunions. Appointed by President. (Art. 19) |
| Social Media Officer | Manages website, social media, email communications, printed materials. Appointed by President. (Art. 20) |
| District Leaders (4) | Represent their district; serve on Election and Finance Committees; conduct annual audit; support reunion attendance. (Art. 22) |

5. Key Contacts

| Role | Contact Information |
|----------------|---|
| President | Name: _____ Phone: _____ Email: _____ |
| Vice President | Name: _____ Phone: _____ Email: _____ |
| Secretary | Name: _____ |

| Role | Contact Information |
|--------------------------|---|
| | Phone: _____ Email: _____ |
| Treasurer | Name: _____ Phone: _____ Email: _____ |
| Parliamentarian | Name: _____ Phone: _____ Email: _____ |
| Americus District Leader | Name: _____ Phone: _____ Email: _____ |
| DMV District Leader | Name: _____ Phone: _____ Email: _____ |
| Atlanta District Leader | Name: _____ Phone: _____ Email: _____ |
| Florida District Leader | Name: _____ Phone: _____ Email: _____ |
| Family Historian | Name: _____ Phone: _____ Email: _____ |
| Social Media Officer | Name: _____ Phone: _____ Email: _____ |

6. Key Dates & Deadlines

| Date | Requirement |
|----------------------------------|---|
| January 1 | Fiscal year begins (Art. 30) |
| By 5th of each month | Monthly financial statement due from Treasurer (Art. 28, Sec. 8) |
| Quarterly | Executive Committee meeting required (Art. 11, Sec. 1) |
| June 1 (election years) | Election Committee convenes (Art. 31, Sec. 2) |
| June 15 (election years) | Nomination deadline (Art. 31, Sec. 4) |
| July (annually) | Family Reunion — no later than 3rd weekend; never on July 4th (Art. 29) |
| Reunion – 7 days | Business meeting agenda distributed to members (Art. 27, Sec. 2) |
| Last day of reunion | Annual financial audit completed by District Leaders (Art. 28, Sec. 7) |
| Within 30 days of leaving office | All materials transferred to incoming officer (Art. 10, Sec. 2) |
| December 31 | Fiscal year ends (Art. 30) |

7. Accounts & Access Log

Complete this log when transferring credentials. Keep a copy with the Secretary.

| Account / Platform | Username / URL | Password Transferred To |
|-------------------------------|----------------|--------------------------|
| Family Email Account | _____ | _____ |
| Family Website | _____ | _____ |
| Facebook Page | _____ | _____ |
| Instagram Account | _____ | _____ |
| Bank Account (Treasurer only) | _____ | See Treasurer separately |
| Cloud Storage / Google Drive | _____ | _____ |
| Genealogy Database | _____ | _____ |
| Other: _____ | _____ | _____ |

8. Transition Acknowledgment Form

To be completed by both the outgoing and incoming officer after all materials have been transferred.

| |
|--|
| Office: _____ |
| Term Ended: _____ New Term Began: _____ |

I, the outgoing officer named below, confirm that I have transferred all required records, credentials, and materials to the incoming officer to the best of my ability.

 Outgoing Officer — Printed Name & Signature Date: _____

I, the incoming officer named below, confirm that I have received the materials listed above and have reviewed the Officer Onboarding Handbook.

Incoming Officer — Printed Name & Signature Date: _____

President (witness) — Printed Name & Signature Date: _____