

ESCYPAA, Inc. — First 30 Days in Service Guide

Purpose

This guide helps newly elected or appointed Advisory Council members transition smoothly into service, understand expectations, and become effective quickly while maintaining unity and balance.

WEEK 1 — ORIENTATION & CONNECTION

✓ Review Core Documents

- Corporate Bylaws
- Policies & Procedures Manual
- Roles & Committees Handbook

✓ Meet Key People

- Chairperson or Co-Chairperson
- Outgoing role holder (if applicable)
- Treasurer (financial expectations overview)
- Secretary (communications & records access)

✓ Access Setup

- Email or shared drive access
 - Meeting links & calendars
 - Financial procedures overview
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WEEK 2 — ROLE IMMERSION

✓ Learn Your Position

- Review your role description
- Ask about annual timeline
- Understand reporting expectations

✓ Observe Operations

- Attend Council meeting (if scheduled)
 - Review recent minutes
 - Review current budgets
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WEEK 3 — ACTIVE PARTICIPATION

✓ Begin Responsibilities

- Take on assigned tasks
- Introduce yourself to committees you support
- Start tracking your projects

✓ Ask for Feedback

- Check in with Chair or mentor
 - Clarify expectations
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WEEK 4 — CONFIDENCE & PLANNING

✓ Establish Your Rhythm

- Set regular service schedule
- Create task tracking system

✓ Plan Ahead

- Review upcoming milestones
 - Identify challenges early
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Service Best Practices

- Communicate early and often
 - Ask for help when needed
 - Respect unity and group conscience
 - Keep good records
 - Balance service with recovery and life
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Optional Mentor System

New members are encouraged to partner with an experienced Advisory member for their first three months of service.

SECTION I — SERVICE YEAR TIMELINE

Quarter 1

- Council elections finalized
- Budget approvals
- Committee planning meetings

Quarter 2

- Outreach expansion
- Bid invitations issued
- Midyear event preparation

Quarter 3

- Convention logistics check-ins
- Financial review
- Unity initiatives

Quarter 4

- Convention execution
 - Financial close-out
 - Transition planning
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SECTION II — REPORTING & ACCOUNTABILITY

Standard Expectations

- Chairs provide brief updates at each Council meeting
 - Financial items routed through Treasurer
 - Major decisions documented in minutes
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SECTION III — ROLE TRANSITION GUIDELINES

Outgoing Trusted Servants Should:

- Provide role documents and passwords
- Review timelines with successor
- Share lessons learned

Incoming Trusted Servants Should:

- Review handbook sections
- Ask questions early
- Establish communication rhythm

SECTION IV — BEST PRACTICE PRINCIPLES

- Unity before efficiency
 - Transparency in finances
 - Shared leadership
 - Clear communication
 - Respect for service commitments
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SECTION V — ROLE CHECKLISTS (PRACTICAL QUICK-GUIDES)

Chairperson Checklist

Monthly

- Prepare and send meeting agenda
- Confirm quorum
- Review financial status with Treasurer
- Follow up on action items

Quarterly

- Review progress toward convention milestones
- Check compliance items
- Support struggling committees

Annually

- Lead governance review
 - Oversee elections & transitions
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Co-Chairperson Checklist

- Attend all Council meetings
 - Track open positions or gaps
 - Support Chairperson tasks
 - Step in when Chair unavailable
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Treasurer Checklist

Monthly

- Reconcile accounts
- Provide financial report
- Verify budget compliance

Quarterly

- Review reserve status
- Audit documentation

Annually

- Prepare and file IRS Form 990
 - Present annual financial summary
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Secretary Checklist

- Record meeting minutes
 - Distribute minutes within one week
 - Maintain digital records
 - Update contact lists annually
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Hotel Chair Checklist

- Review all hotel contracts
 - Track deadlines and deposits
 - Provide progress reports
 - Support Host Committee negotiations
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Archivist Checklist

- Maintain archive inventory
 - Collect annual materials
 - Prepare convention display
 - Coordinate storage transition
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Outreach Chair Checklist

- Host monthly outreach calls
 - Issue annual bid invitations
 - Promote statewide events
 - Track outreach engagement
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Prayer & Unity Chair Checklist

- Open/close meetings with prayer
 - Organize annual group inventory
 - Coordinate Midyear Event
 - Promote unity initiatives
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Web Chair Checklist

- Update website content monthly
 - Post minutes and events
 - Remove outdated material
 - Support Host Committee pages
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Liaisons Checklist (All Types)

- Maintain regular contact with assigned cities
 - Attend key meetings or events
 - Provide updates to Advisory Council
 - Encourage participation and bids
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Onboarding Guide Appendix

First 30 Days in Service

- Review bylaws, policies, and handbook
- Meet with outgoing role holder
- Set goals with Chairperson
- Review timelines and budget expectations

Ongoing Support

- Quarterly check-ins
 - Access to shared documents
 - Mentorship within Advisory
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Welcome to service — your willingness makes ESCYPAA possible.