

Orientation Checklist

Best Practice Resources – Orientation Checklist & Considerations

This sample can be modified to fit the context of your specific mentoring program. Your orientation checklist should be detailed in writing in your employee handbook and should be reviewed for new staff during on the job training.

Delivering the Orientation:

The following is a step-by-step guide to facilitating a new mentor orientation. Before conducting the orientation consider the following components related to facilitating and adult learning opportunity.

Before the Training

Double check that you've brought adequate copies of all relevant training materials such as:

- Program Volunteer Handbook
- Reflection Sheet
- Evaluation Sheet
- Planning our First Meeting Worksheet
- Signs of Unhealthy Boundaries
- Child Abuse Packet
- Confidentiality Agreement
- Volunteer Photo/Video Waiver
- Receipt of Volunteer Handbook
- Mentor Commitment
- 40 Developmental Assets
- Youth Development Fact Sheet
- Free Activities to do with Your Mentee in *(fill in your community)*

If funding allows it is nice to include all of this information in neatly labeled program binder for each participant.

1. Consider the following points related to training location/space
 - a) Location, is the training to be held in a facility in the vicinity of the volunteer's position? It doesn't make sense to train volunteer mentors in Salem, if their anticipated volunteer role is in Portland. Try to avoid this whenever possible.
 - b) Are reservations required for use of your planned meeting space? Will the building/room be accessible on the day of your orientation? Be aware of all building codes, locks and expectations around appropriate use.
 - c) What materials and hardware will you need to conduct the training?
 - Projector
 - Comfortable chairs
 - Pens, nametags
 - Application Materials
 - Stress relieving objects
 - d) Are restrooms easily accessible? Make sure participants are aware of how to access restrooms.

- e) Arrive with plenty of time to set up necessary materials and hardware. Lay program materials out neatly and in the order of their usage during the training. Ask people to write a nametag and grab one copy of each necessary document before sitting down.
- f) Consider lighting. Harsh or bright light can cause people to lose focus, experience headaches and become tired. Consider these effects when selecting a space to facilitate a 3+ hour orientation. If possible try to take advantage of natural lighting and dim, overhead halogen lights.
- g) Always provide at minimum coffee, snacks and water. Remember that people absorb information better when they are not distracted by hunger. Consider providing a full meal if/when budget and time restrictions allow.

Beginning the training

1. Always start on-time.
 - o If for some reason you cannot start as scheduled be sure to thank individuals who arrived on time and notify them of any problem/situation and your plan for proceeding.
2. Develop a learning contract, a simple/informal way of outlining participation expectations for the training. Use a white board or large training pad and colored markers to write up a “group learning agreement.” Start by asking people to call out some of their expectations for a positive learning experience. For example:
 - o Notify participants of training schedule including breaks
 - o Turn cell phones off or on silent, ask that individuals take calls outside of the room if necessary, and to demonstrate respect and active participation by refraining from texting
 - o Respect the opinions and feedback of others
 - o No discriminating or disparaging remarks of any kind
 - o Remind participants to respect one another’s confidentiality. Personal information may be shared during the course of the training that should not leave the training experience
 - o Ask participants if there is anything else that would like to add
 - o When contract is complete post it in a place where everyone can see it and ask if everyone is comfortable with the expectations outlined. Remind participants that if they are unable to meet the learning agreements, then they will be asked to leave and will forfeit an opportunity to become a mentor in this program.
3. Begin with Introductions.
 - o Explain your name, role and interest in the topic area. Let everyone know they’ll be introducing themselves in a minute.
 - o Use a participatory ice-breaker for introductions
4. Outline goals of orientation and purpose

Diving into the Meat of the training

Try to summarize information captured on slides. Don’t read verbatim. Considering developing a script or bullet points to describe each section below.

- Introduce program including organizational history, mission and goals
- Describe mentoring program model and theory of change
- Review program policies and procedures
- The role of a mentor
- Volunteer Rights & Benefits
- Break*

- Icebreaker: who mentored you?
- Stages of the Mentoring Relationship
- Review & Practice Skills for Stages of the Relationship
- Effective Communication Strategies
 - Active Listening
 - Modeling I Messages
 - Paraphrasing
 - Open-Ended Questions
 - Build Self-Efficacy & Self-Determination
- Roadblocks to Communication
- Boundaries
- Dealing with Difficult Situations
- Communication Role Plays
- Preparing for the First Meeting
- Relationship Closure
- Conclusion
- Reflection Exercise
- Orientation Evaluation

It's always a good idea to facilitate an orientation with at least two staff members. This is particularly helpful in the case of emergencies or scheduling conflicts. You might also consider positioning training facilitation as a professional development tool for relevant staff. If your program is limited to just one or two staff, encourage these individuals to dedicate a few days each year to reviving training materials and incorporating new and improved exercises and best practice information.