

ORIENTATION CHECKLISTS

For Museum Staff, Volunteer & Board Members

Staff Orientation

- Where and what time should I report?
- What should I wear?
- Whom should I ask for?
- Where should I park?
- What are my work hours?
- Will I be expected to work overtime, evenings, or weekends?
- Will I need to travel? If so, how often?
- How flexible are my work hours if I need to take time off to handle a personal issue?
- Who will I be working with?
- What are my specific job responsibilities and duties?
- How will my work be evaluated?
- How does my work relate to the goals of the organization?
- What channels exist to share ideas, suggestions, or concerns?
- How do people prefer to communicate within the organization (face-to-face, e-mail, phone, texting)?
- Do I get a laptop? A smart phone? Internet access?
- What are the museum's mission, vision, and values?
- What is the culture like?
- Do we have a strategic plan?
- Assign a buddy.

During a New Staff Person's First Week at the Museum

- Complete all paperwork (i.e., I-9 form, tax forms, code of conduct, etc.)
- Share information about benefits.
- Talk about the museum culture.
- Talk about museum policies and procedures
- Discuss security (i.e., policy, keys, security card, exits, etc.)
- Give a tour.
- Put faces to names.
- Share the job description.
- Outline job responsibilities.
- Review the title and terms of compensation.
- Get technological.
- Consider a formal 90-day performance appraisal for new hires.*

** The purpose of a 90-day performance appraisal is to assess the quality and quantity of the new staff member's work as well as understanding of the position requirements. This review should also clarify employee concerns and questions as well as management's expectations. Finally, it should set goals for the next nine months, including timelines and measurements.*

SOURCE: adapted from Bob Kelleher, *Employee Engagement for Dummies*, John Wiley & Sons, 2014

Volunteer Orientation

- Welcome
- History of the museum, it's Mission and Programs
- Future goals and vision of the museum
- Philosophy of volunteer engagement
- Introduction to volunteer program
- Expectations/benefits of volunteering
- General policies/procedures
- Basic agency/facility information
- Organizational chart
- Fundraising efforts
- Culture of museum
- Dress code, parking, etc.
- Liability coverage
- Training required
- Supervision system
- Handbook
- Confidentiality forms
- Who should take part in the orientation? Executive director, volunteer's supervisor, manager of volunteer resources.
- Methods use to present information: in groups (scheduled regularly and as needed), one-on-one as volunteer starts, online and written materials, facility tour, etc.

Source: "Interviewing, Orienting & Training Volunteers," UServeUtah & Utah Division of Arts & Museum, 2017

Board Orientation

- Your mission, history, and statement of values
- Board member job description and expectations
- Board member agreement
- Conflict of interest policy
- Board roster and list of committees, their charters, and who serves on them
- Bios of current board members and key staff
- Calendar of meetings for the year ahead
- Approved budget for the year, recent financial reports and audited financials
- Bylaws and certificate of incorporation
- Determination letter from the IRS and certificate of tax exemption from the state
- Summary of Directors' and Officers' insurance coverage
- Policies (or board resolutions) relating to the board's role to review the executive director's compensation
- Board travel reimbursement policy and form to use to request reimbursement
- Whistleblower policy
- Annual report or other document that lists the donors/grantmakers that support the organization, as well as the organization's recent achievements
- Board minutes from the last three meetings
- Background information on any special issues

SOURCE: www.councilofnonprofits.org/tools-resources/board-orientation