



Volunteer On-Site Orientation Check List

To be completed within one week of start date. Both volunteer and United Way should keep a copy.

_____ **Introduction to the United Way system**

- _____ History of the United Way of the Tri-Valley Area
- _____ Organizational mission
- _____ Role in the community
- _____ Organizational culture
- _____ History of community fund-raising and allocations
- _____ History of community projects and community building activities

_____ **Introduction to community**

- _____ Socio-economics, demographics and diversity
- _____ History and present status of community assessment

_____ **United Way Staff and Board**

- _____ Roles and responsibilities
- _____ Management style
- _____ Preferred time/style of communication

_____ **Agency policies, procedures, protocols**

- _____ Who speaks for the organization
- _____ Harassment
- _____ Confidentiality and Code of Ethics

_____ **Potential resources that can be applied to achieve project goals**

- _____ Media connections
- _____ Partner agencies
- _____ Businesses
- _____ Volunteers
- _____ Agency stakeholders
- _____ Political/professional connections

_____ **Where/how to access materials, supplies, equipment, forms, support**

- _____ Typing/clerical support
- _____ Computer system and usage
- _____ E-mail
- _____ Parking
- _____ Office forms
- _____ Security issues
- _____ Telephone protocol
- _____ Dress code

_____ **Review Project Work Plan (as appropriate)**

- _____ Determine specific assignments
- _____ Develop plan for “getting started”
- _____ Volunteer expectations/evaluation