

Orientation for Council / Committee Advisors

When a new Caregiver Advisor has been recruited for a council or committee, they should be given an orientation on their advisory role and information about the council/committee they are joining. They should also receive an orientation package which includes the information covered in the orientation session and other items of interest (e.g., a list of past achievements). One member of the organization (e.g., Staff Liaison or committee member) should be designated to guide the new Caregiver Advisor.

Use the following checklist to ensure the new advisor receives a comprehensive orientation:
(Note: customize the checklist to meet the specific needs of your council/committee.)

Phase 1: When a new Caregiver Advisor has been chosen:

- Confirm that the successful candidate has completed the mandatory Volunteer Services Requirements of your organization (if applicable)
- Send a “Welcome to the committee/council” email that includes:
 - Request for the preferred method of contacting the new member (e.g., phone, email, text)
 - Name and contact information of Staff Liaison or mentor
 - Upcoming meeting dates and times
 - Copies of previous minutes

Phase 2: Before the new advisor’s first meeting, arrange for an Orientation Session that covers the following topics and provides written documentation:

- Relevant organizational policies, strategies and goals
- Your group’s Terms of Reference, including values and vision (if applicable)
- Rules of engagement for meetings
- Applicable confidentiality policies and regulations
- Review of council/committee’s past achievements
- Review of council/committee’s present projects
- Overview of council/committee’s internal and external connections
- Benefits of being a Caregiver Advisor

Phase 3: Be sure to include the following ‘housekeeping’ items as a part of the above Orientation Session:

- Description of Caregiver Advisory role and responsibilities
- Guidelines on sharing personal experiences in a productive manner
- Names and contact information of other council/committee members
- Staff Liaison’s name and contact information (if applicable)
- Glossary of acronyms and commonly used terms

