

## 1.6 Orientation of Elected/Appointed Officials

### Description:

This tool provides a checklist of items to be prepared and presented as part of an orientation process on your health centre for a newly elected/appointed official and suggests an agenda for an orientation meeting.

### How it can be used:

During your tenure as a health manager, you will be required to orient newly elected or appointed health councillors or members of your Board or Health Committee. Being prepared with a list of the types of information that the official will need to know about your centre's programs and services will ensure that you can bring them 'up to speed' quickly. A checklist can also be useful for you as a reminder of the items that always need to be kept up to date. The agenda helps you structure a face-to-face session and notes key elements that need to be included.

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Considering that the new official will likely have a steep learning curve, ensuring that you present the crucial information in the clearest fashion will be most important. Situate your information within the larger context (i.e., how the health centre functions within the band). Do not overwhelm with information, but include items that are critical.

If you are providing a presentation, follow the rules of creating effective presentations - fewer slides, less text, key points only. Supply 'briefing note' style documents to explain the main points in slides. If there are large documents, prepare a one page summary that captures key points. Arrange information in an easy-to-read and reference format such as a binder with tabs. Be sure to include all key policies related to your health centre. Follow up with more detailed information when appropriate and be available for questions.

### Sample Agenda for Orientation Session

- Welcome
- Introductions including roles
- Review of the session materials and notes about other resources
- Overview of the organization (history, where it is positioned within the larger context, mandate, size, etc.)
- Review of accountabilities, roles, responsibilities (key positions within the health organization, the newly elected/appointed official), and structures
- Review of strategic plan and key activities
- Discussion of most important next steps
- Questions and answers
- Agree on a schedule for future meetings (if appropriate)

### Orientation Checklist – Covers the Basics

Item	Available	Notes (i.e., where it is found, needs to be updated, etc.)
Articles of Incorporation, By-laws		
Program and services overview		
Most recent Annual Report		
Most recent budget		
Current financial reports		
Minutes from previous year		
Strategic Plan		
Key policies (relationships between Board and Health Centre, Code of Conduct, etc.)		
Organizational Charts		
Organizational standards and guidelines		
Health Director and key officers – roles and responsibilities, contact information, etc.		
Schedule of key events and meeting dates		

### Orientation Checklist – More than the Basics

Item	Available	Notes (i.e., where it is found, needs to be updated, etc.)
Centre history		
Director and key officer bios		
Prior reports		
Committee(s) activity or work plans		
Communication and engagement plans/materials		
Advocacy plans		
Human resource plans and policies		
Volunteer planning		
Fundraising planning		
Details on programs and services		
Trends and issues in programs and service delivery		
Other relevant documents		