

Sample Library Trustee Orientation Process

Breaking orientation into pieces :

1. Preparation: Web site, check out some items, go to a program or two, acronyms
2. Connecting: Working session (Library director/ board chair)
3. Touring: Library tour (branch tour)
4. More Connecting: Meet staff
5. Reading and absorbing: Board packet of information
6. More learning: Ongoing continuing education

1. Preparation

- ☐ Visit the library
- ☐ Search the catalog
- ☐ Check out different types of materials
- ☐ Go to a library program or two
- ☐ Ask your neighbors and friends about the library (users and non-users)
- ☐ Study the web site

2. Meetings

- ☐ Board orientation policy:
 - i. timeframe for training
 - ii. list of who to meet with
 - iii. What TOPICS should be discussed
 - iv. what documents to be received by new board members.

Learn about:

- ☐ Library relationship to local entities
- ☐ Cooperative ventures
- ☐ Vision of the library future
- ☐ Customer service philosophy
- ☐ Communicating with board and library staff
- ☐ Current legislation and library law
- ☐ Touch on roles and responsibilities

3. Library tour

- ☐ Main building
- ☐ Branches
- ☐ Technologies used

4. Meet staff

5. Board Packet

1. List of board members, contact information, terms of office, background if you can
2. Description of board committees or other library groups
3. Bylaws
4. Library's vision, mission, goals, values, plans, code of ethics, etc.
5. Current policies
6. Employee handbook (benefits and rules)
7. Budget and latest audit
8. Board minutes (six months back)
9. Annual report and/or latest statistical report
10. Organizational chart (department chart for larger libraries)
11. Colorado Library Law (including open meeting, open records, and privacy laws)
12. Library information (hours, programs, services, etc.)
13. Brochures or other publications

Continuing Education: Board orientation is only the first step in board training, ongoing continuing education is needed about the library and the role of the trustee or friend

- ☐ Roles and responsibility training