

# NEW TRUSTEE ORIENTATION

## WHO

New trustees typically receive their orientation from the library director and the library board chair or his/her designee.

- The library director provides an introduction to the library operations.
- The board representative provides an overview of the board's organization, responsibilities, and expectations.

The director and the board representative are typically present during both of these presentations.

## WHY

Experienced trustees often forget how little they knew about libraries when they first became board members. Most new library trustees are library users, but few have any understanding of New York library laws, the duties of the library board, the full spectrum of services offered by the library, or the challenging environment in which public libraries operate in today's world. A comprehensive orientation will prepare a new trustee to participate fully in the board's deliberations from the beginning.

## WHEN

Orientation meetings should be scheduled as soon as possible after the trustee is appointed or elected. There is a lot of information to cover and it will be best to schedule two orientation meetings. One meeting will focus on the library's facilities and operations. The other meeting will focus on the board's organization, responsibilities, and expectations. Ideally, both orientation meetings will take place before the new member attends his or her first official board meeting.

## HOW

1. Prepare an orientation notebook for the new trustee to use to organize the materials that will be covered during the orientation meetings.
2. Call the new trustee to schedule two orientation meetings. Tell the new trustee that s/he will be receiving an orientation notebook and some basic information in the mail prior to the first meeting. Additional information for the notebook will be provided during the orientation meetings.
3. Send the orientation notebook with these documents:
  - List of board members with contact information
  - Name of the library director and senior managers with contact information
  - Board by-laws
  - Dates of upcoming board meetings

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## WHAT

During the meeting that focuses on the library operations, the new trustee will receive:

- A brief history of the library
- A tour of the library facility(ies)
- Introductions to library staff
- An overview and copy of the library's strategic plan\*
- A summary of the progress reports on the strategic plan\*
- A copy of the most recent *Annual Report*\*
- Copies of the current and past year budgets with a brief review noting any significant changes\*
- Copies (or links to the online version) of the library's policies\*
- The three most recent director's *Report to the Board*\*
- A sampling of library newsletters, brochures, and related library publicity materials\*
- The union contract (if applicable)\*
- The *Staff Handbook*\*
- A complete staff list and organization chart\*

During the meeting that focuses on the board's organization, responsibilities, and expectations, the trustee will receive:

- A brief discussion of the duties of a library trustee
- The library's charter documents\*
- A list of board committee memberships\*
- The minutes of recent board meetings\*
- Information on *Open Meetings Law*\*
- Information on the Friends of the Library (if applicable)
- An explanation of the State Library and the public library system that the library is a part of, including the services they provide to the library
- Links to:\*

  - The library's web site
  - *The Handbook for Library Trustees of New York State*
  - The New York State Regents *Statement on the Governance Role of a Trustee or Board Member*
  - The New York Library Trustees Online web site

\*These items should be three-hole punched and ready to be added to the trustee's orientation notebook.

Source: Some of this material came from *The Handbook for Library Trustees from the State of New York, 2010*.