



## Building Strong Library Boards

# **A Best Practices Guide for Trustee Recruitment** *For Public Library Boards and Directors*

## Contents

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Introduction .....	3
Section 1: Finding Qualified Candidates .....	3
Director and Board Alignment: Getting on the Same Page.....	3
Recruitment Strategies: Where to Find Candidates .....	5
Making the Ask: The Invitation to Serve.....	7
Addressing Common Objections.....	8
Building a Candidate Pipeline.....	9
Section 2: Engaging and Educating Prospects .....	9
Core Responsibilities of Trustees .....	10
Creating Compelling Role Descriptions.....	11
Setting Realistic Expectations .....	11
Allowing Prospects to "Try Before They Apply" .....	12
Section 3: Vetting and Selection.....	13
Essential Qualifications vs. Nice-to-Haves .....	13
Balancing Expertise with Community Representation .....	13
The Interview Process .....	14
Reference Checking .....	15
Making the Final Decision.....	15
Section 4: Onboarding and Orientation.....	16
Section 5: New York State Legal Requirements .....	19
Templates and Tools.....	20
Template 1: Board Composition Matrix.....	20
Template 2: Skills Gap Analysis Worksheet.....	21
Template 3: Trustee Role Description.....	22
Template 4: Interview Question Bank .....	24
Template 5: Letter to Appointing Authority .....	25

## Introduction

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Strong library boards begin with thoughtful trustee recruitment. This guide provides practical strategies and tools for SALS member libraries to find, engage, and select qualified trustees who will actively contribute to your library's mission and bring needed expertise to governance work.

Whether you serve on an association library board, a municipal library board, or a school district library board, this guide offers:

- Strategies for finding qualified candidates beyond your immediate networks
- Guidance on aligning board and director roles in the recruitment process
- Templates and tools ready to customize for your library
- New York State Education Law requirements specific to your library type

## Section 1: Finding Qualified Candidates

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The most common challenge libraries face is simply finding people willing to serve on their boards. The second challenge is finding people who bring both community connection *and* the expertise needed for their board. This section provides concrete strategies for both.

### Understanding the Challenge

Before diving into recruitment strategies, it's helpful to understand why finding trustees can be difficult:

- **Limited awareness:** Many community members don't know board positions exist or don't think of themselves as qualified
- **Time concerns:** People assume board service requires more time than it actually does
- **Insular networks:** Boards often recruit from within existing social and professional circles, limiting diversity
- **Association library dynamics:** Self-perpetuating boards can become disconnected from the broader community they serve

### Director and Board Alignment: Getting on the Same Page

Successful trustee recruitment requires clarity about roles and a shared understanding of what the board needs. Before launching any recruitment effort, the board and director should work together to answer these questions:

#### *Step 1: Conduct a Skills and Expertise Audit*

Begin by honestly assessing what your board has *and* what it needs.

**Board's role:** Complete the Board Composition Matrix (see templates) to map current trustees' skills, community connections, demographics, and term expiration dates. Identify gaps.

**Director's role:** Provide input on operational areas where board expertise would be particularly valuable. *For example: building projects need architecture experience, financial oversight needs accounting expertise.*

**Together:** Use the Skills Gap Analysis Worksheet (see templates) to prioritize what is critical versus nice-to-have. Remember that you also need community connectors, not just technical experts.

**Step 2: Define Clear Role Boundaries**

Establish who does what in the recruitment process:

<i>Activity</i>	<b>Board's Responsibility</b>	<b>Director's Responsibility</b>
<i>Identifying candidates</i>	Leads outreach, makes personal invitations	Suggests prospects based on community connections, provides names when asked
<i>Initial conversations</i>	Conducts invitation to serve conversation, explains governance role	Available to answer operational questions if prospect requests
<i>Formal interviews</i>	Conducts interviews, asks governance and commitment questions	Attends if board requests, provides library context, does NOT participate in candidate evaluation
<i>Selection decision</i>	Makes final decision (association/municipal) or recommendation to appointing authority	Not involved in selection decision
<i>Orientation</i>	Provides governance training, board policies, trustee handbook	Provides operational overview, library tour, staff introductions, programmatic context

**Key principle:** The board owns the recruitment and selection process. The director supports it by providing organizational context and logistical assistance but doesn't drive candidate selection.

**Step 3: Create a Recruitment Plan**

Don't wait until a seat is vacant to start looking. Build a pipeline of prospects.

**Board's role:** Establish a nominating committee (if you don't have one). Review term expirations annually. Set a timeline: begin recruitment 6-9 months before the anticipated vacancies.

**Director's role:** Maintain awareness of community members who show interest in the library, attend programs regularly, or have relevant expertise. Share these names with the board when recruitment begins.

**Together:** Use the Targeted Recruitment Plan template (see templates) to identify which organizations, networks, and community groups to approach for candidates with needed skills.

## Recruitment Strategies: Where to Find Candidates

The best recruitment approaches vary by what you are looking for. Here are proven strategies:

### *Strategy 1: Look Beyond Your Immediate Network*

**The challenge:** Boards often recruit people they already know, which limits diversity and perpetuates the same perspectives.

**The solution:**

- **Library users:** Pay attention to regular patrons, especially those who attend programs, volunteer, or make thoughtful suggestions
- **Community organizations:** Rotary, Lions Club, Kiwanis, garden clubs, historical societies, Friends groups
- **Local government:** Planning boards, zoning boards, conservation commissions (people already serving their community)
- **Schools:** PTA/PTO leaders, retired teachers and administrators
- **Faith communities:** Active members of local congregations who value community service
- **Newcomers:** Recent arrivals to your community often looking for connection points

**Strategy 2: Targeted Recruitment for Specific Expertise**

**The challenge:** Your board needs someone with specific skills (financial, legal, construction, HR, fundraising), but you don't know where to find them.

**The solution:** Go where professionals in those fields already gather.

<i>Needed Expertise</i>	<i>Where to Look</i>
<i>Finance/Accounting</i>	Local CPA firms, bank managers, credit union boards, nonprofit financial officers, recently retired financial professionals
<i>Legal</i>	Local bar association, solo practitioners or small firms with community ties, municipal attorneys, retired lawyers
<i>Architecture/Construction</i>	AIA (The American Institute of Architects) chapter, local contractors and builders, facilities managers, project managers, building inspectors
<i>Human Resources</i>	Local SHRM (The Society for Human Resource Management) chapter, HR directors at area businesses, employee benefits consultants
<i>Technology/IT</i>	IT professionals at local businesses, tech startup founders, school technology directors
<i>Marketing/Communications</i>	Local marketing firms, public relations professionals, communications directors, journalists
<i>Fundraising</i>	Development professionals at local nonprofits, community foundation staff, successful campaign chairs

**TIP:** Don't just focus on currently employed professionals. Recently retired professionals often have:

- More time to dedicate to board service
- Decades of expertise to share
- Strong desire to stay connected to their community
- No conflicts of interest with current employment

**Strategy 3: Breaking Insularity in Association Libraries**

**The challenge:** Self-perpetuating boards can become disconnected from the broader community, repeatedly nominating people from the same social circles.

**The solution:** Implement structural changes that encourage broader recruitment:

- **Establish a nominating committee:** Even if not required by your bylaws, create a committee specifically charged with seeking diverse candidates
- **Consider term limits:** If your bylaws allow, implementing term limits creates natural turnover and opportunities for new perspectives
- **Make recruitment transparent:** Post board vacancies publicly on your website, in the library, in community newsletters
- **Ask the hard question:** Who is not in this room? What perspectives are we missing?
- **Partner with diverse community organizations:** Reach out to groups representing different ages, cultures, neighborhoods, and backgrounds

#### *Strategy 4: Working with Municipal Appointing Authorities*

**The challenge:** For municipal and school district libraries, the board doesn't control appointments - the town board or school board does.

**The solution:** Build strong relationships with appointing authorities and educate them about library needs:

- **Don't wait for vacancies:** Meet with the town board or school board annually to discuss the library's strategic direction and upcoming board needs
- **Provide specific guidance:** When a vacancy arises, send a letter to the appointing authority describing desired qualifications (see template)
- **Suggest candidates:** While you can't make the appointment, you can recommend qualified individuals
- **Educate about library governance:** Help appointing authorities understand that library trustees need specific qualities beyond general civic engagement

#### **Making the Ask: The Invitation to Serve**

Once you've identified promising candidates, someone from the board (ideally the board president or nominating committee chair) should make personal contact. This is not a job interview, yet it is an invitation to explore the possibility of service. Key elements of an effective invitation:

- **Personal touch:** Phone call or in-person conversation works better than email
- **Specific compliment:** Explain why you think they would be a great fit

- **Realistic expectations:** Be upfront about time commitment (typically monthly meetings plus committee work)
- **Meaningful work:** Emphasize the real impact trustees have on their community
- **Low-pressure exploration:** Invite them to attend a board meeting as an observer or meet with you for coffee to learn more

**Sample invitation language:**

*We are looking to expand our library board, and your name came up because of your [specific quality or expertise]. The library is at an exciting point - we are [specific project or initiative], and we could really use someone with your background in [area]. Would you be interested in learning more about what is involved? No pressure - I would love to just have a conversation about it.*

**Addressing Common Objections**

When you invite someone to serve, you'll often hear the same hesitations. Here's how to address them:

<i>What They Say</i>	<b>How to Respond</b>
<i>I do not have time</i>	Be specific about time commitment. We meet once a month for about two hours, usually on [day/time]. Some trustees also serve on a committee that meets quarterly. That is really the core of it.
<i>I do not know anything about libraries</i>	You do not need to be a librarian! We need people who understand [their area expertise], community needs, and good governance. Our director handles library operations - we focus on policy, planning, and oversight.
<i>I am not qualified</i>	Actually, your background in [their area] is exactly what we need right now. We can teach you about library governance - we cannot teach the expertise you would bring to the table.
<i>I am new to the area</i>	That is valuable - you bring fresh eyes and can ask questions long-time residents might not think to ask. Plus, it is a great way to get to know your new community.
<i>What if I cannot make every meeting?</i>	We understand people have conflicts occasionally. What is important is that you can attend most meetings and stay engaged with the work between meetings. Occasional absences are expected.

## Building a Candidate Pipeline

The best recruitment doesn't happen in a panic when someone resigns. Instead, successful boards:

- **Maintain awareness year-round:** Keep a running list of potential candidates, adding names throughout the year
- **Cultivate relationships:** Invite prospects to library events, introduce them to board members, keep them informed about library initiatives
- **Review annually:** At least once a year, review upcoming term expirations and assess your candidate pipeline
- **Start early:** Begin active recruitment 6-9 months before anticipated vacancies

## Key Takeaways for Finding Candidates

1. Get the board and director aligned on roles, needed skills, and recruitment strategy before starting outreach
2. Look beyond your immediate network and existing board members' social circles
3. Use targeted recruitment when you need specific expertise
4. For association libraries, implement structural changes to break insularity patterns
5. For municipal/school district libraries, educate and partner with appointing authorities
6. Make personal invitations to candidates and address common objections thoughtfully
7. Build and maintain a candidate pipeline year-round, not just when vacancies arise

## Section 2: Engaging and Educating Prospects

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Once you've identified promising candidates, the next step is helping them understand what board service truly involves. Many qualified people decline to serve because they don't fully understand the role or underestimate their qualifications. This section helps you effectively engage prospects and set realistic expectations.

### *What Prospects Need to Know Upfront*

Transparency from the beginning builds trust and helps prospects make informed decisions. Don't oversell or undersell the role - be honest about both the challenges and rewards.

### *Time Commitment and Meeting Schedules*

Be specific about what board service actually requires:

**Monthly board meetings:** Specify day, time, typical duration, and whether meetings are in-person, hybrid, or virtual

**Committee work:** Explain which committees exist, how often they meet, and the expected time commitment

**Preparation time:** Board members should review meeting materials in advance (typically 1-2 hours per month)

**Special events:** Annual meetings, library events, community presentations, fundraising activities

**Continuing education:** Trustee training opportunities through SALS, New York Library Association, or other organizations

*Example time breakdown:*

- Monthly board meeting: 2 hours
- Meeting preparation and reading: 1-2 hours
- Committee meeting (quarterly for most): 1 hour per quarter
- Library events and community engagement: 3-4 hours per year
- Total: Approximately 4-6 hours per month on average

## Core Responsibilities of Trustees

Help prospects understand the scope of board governance:

**Strategic Planning:** Setting long-term vision and goals for the library

**Policy Development:** Establishing policies that guide library operations and ensure legal compliance

**Financial Oversight:** Approving budgets, monitoring financial performance, ensuring responsible stewardship of public funds

**Director Support and Evaluation:** Hiring, supporting, and annually evaluating the library director

**Advocacy:** Representing the library to stakeholders, securing funding, building community support

**Legal Compliance:** Ensuring the library meets all applicable federal, state, and local requirements

### *The Difference Between Governance and Operations*

This is often the hardest concept for new trustees to grasp, but it's essential. Many capable people avoid board service because they think they'll be expected to shelve books or run programs. Others join the board and then micromanage staff. Help prospects understand the distinction:

#### **What the Board Does (Governance):**

- Sets overall direction and priorities
- Establishes policies
- Approves budgets and monitors finances

- Hires and evaluates the director
- Ensures legal and ethical compliance
- Advocates for library funding and support
- Asks strategic questions like: Are we serving our community well? Are we planning appropriately for the future?

#### **What the Director and Staff Do (Operations):**

- Implement board policies
- Manage day-to-day operations
- Hire, supervise, and evaluate staff (except the director)
- Develop and deliver programs and services
- Select materials for the collection
- Handle patron interactions and concerns
- Execute the strategic plan

### **Creating Compelling Role Descriptions**

Use Template 3 (Trustee Role Description) to create a document that excites prospects while being realistic. Key elements:

**Lead with impact:** Start with what difference trustees make in the community, not just a list of duties

**Be specific about your library:** Don't use generic language; tell your library's unique story

**Highlight what trustees gain:** Professional development, community connections, meaningful service, governance experience

**Address common concerns:** Explicitly state you don't need library experience; you need community knowledge and good judgment

**Include next steps:** Make it easy for interested people to learn more

### **Setting Realistic Expectations**

Address these common questions and concerns directly:

*"Will I need to fundraise?"*

Be honest about your expectations. Some libraries expect trustees to contribute financially or actively fundraise; others don't. Clarity prevents future conflicts.

*"What if I disagree with a board decision?"*

Explain that healthy boards welcome diverse perspectives and robust discussion. Once the board votes, however, all trustees support the decision publicly - even those who voted against it. This is the "one voice" principle.

*"How much library knowledge do I need?"*

Reassure prospects that you'll provide orientation and ongoing training. What matters most is their commitment to the library's mission, their expertise in their field, and their willingness to learn.

*"What happens if I need to step down?"*

Acknowledge that life circumstances change. While you hope trustees complete their terms, there are processes for resignation if necessary. This shouldn't be a lifetime commitment that feels inflexible.

### Allowing Prospects to "Try Before They Apply"

Give prospects low-pressure ways to learn about board service before committing:

**Attend a board meeting as an observer:** Invite them to sit in on a regular meeting (check that your bylaws and Open Meetings Law allow this)

**Coffee with current trustees:** Arrange informal conversations with 2-3 current board members who can share their experiences

**Library tour with the director:** A behind-the-scenes tour helps prospects understand operations and meet staff

**Review key documents:** Provide recent board meeting minutes, the strategic plan, and the annual report so they understand current priorities

**Attend a library program or event:** Seeing the library in action helps prospects envision their role in supporting its mission

### Key Takeaways for Engaging Prospects

1. Be transparent and specific about time commitments
2. Clearly explain the difference between governance and operations
3. Use real examples from your library to make the role concrete
4. Address common concerns and questions proactively
5. Provide multiple ways for prospects to learn about board service before committing
6. Emphasize both the responsibilities and the rewards of service
7. Create welcoming opportunities for prospects to experience board work firsthand

## Section 3: Vetting and Selection

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Not every interested person will be the right fit for your board. This section helps you assess candidates thoughtfully and make selection decisions that strengthen your board's effectiveness.

### Essential Qualifications vs. Nice-to-Haves

Start by distinguishing between must-haves and preferences:

#### *Essential Qualifications (Required):*

- Legal eligibility to serve (residency requirements, age, voter registration as applicable to your library type)
- Commitment to the library's mission and community service
- Ability to attend most board meetings and participate actively
- Willingness to work collaboratively with other trustees and respect majority decisions
- Understanding of fiduciary responsibility and duty of care
- No significant conflicts of interest
- Basic literacy and ability to review financial documents, meeting materials

#### *Valuable Qualifications (Preferred):*

- Professional expertise in areas where board needs support (finance, legal, HR, construction, etc.)
- Connections to underrepresented community groups
- Prior nonprofit board experience
- Fundraising or grant-writing skills
- Strategic planning experience
- Public speaking and advocacy abilities
- Understanding of local government processes (for municipal libraries)

### Balancing Expertise with Community Representation

Your board needs both technical expertise AND diverse community perspectives. Don't fill every seat with lawyers and accountants. You also need:

- People from different neighborhoods and demographic groups
- Various ages and life stages (young families, retirees, working professionals)
- Users of different library services (children's programs, adult education, technology assistance)
- People with deep community roots AND newcomers with fresh perspectives
- Professional expertise AND lived experience relevant to library users

*Think about board composition holistically. A board of highly credentialed professionals who all come from the same neighborhood and socioeconomic background will have blind spots, no matter how qualified each individual is.*

## The Interview Process

Even for board positions, a structured interview helps you assess fit and gives candidates a chance to ask questions.

### *Who Should Conduct Interviews*

**Association libraries:** Typically, 2-3 board members (often including the board president and nominating committee chair)

**Municipal libraries:** Board representatives, possibly with input from the appointing authority

**Director involvement:** Optional. Some boards include the director to answer operational questions; others keep selection solely in board hands. If the director attends, they observe and inform but don't vote on candidate selection.

### *Essential Questions to Ask*

Use Template 4 (Interview Question Bank) and customize it for your needs. Key areas to cover:

#### **Assessing Commitment and Availability:**

- "We meet on [specific day/time]. Can you commit to attending most meetings?"
- "What other board or community commitments do you currently have?"
- "This is a [X]-year term. Can you commit to serving the full term?"
- "How do you handle competing priorities when they arise?"

#### **Evaluating Governance Understanding:**

- "How would you describe the difference between the board's role and the director's role?"
- "Tell me about a time you disagreed with a group decision. How did you handle it?"
- "What does good governance mean to you?"
- "Have you served on a board before? What did you learn from that experience?"

#### **Understanding Motivation:**

- "What draws you to library board service specifically?"
- "What do you hope to contribute?"
- "What do you hope to gain from this experience?"
- "How do you use the library? What do you value most about it?"

#### **For Candidates with Specific Expertise:**

- "How do you see your [professional background] contributing to the board's work?"
- "Can you distinguish between providing professional insight versus doing pro bono work for the library?"
- "Are there any potential conflicts of interest we should discuss?"
- "How comfortable are you learning about library-specific considerations that might differ from your professional experience?"

## *Red Flags to Watch For*

Some warning signs during the interview process:

**Misunderstanding the role:** "I want to help choose books" or "I'll run the summer reading program" suggests they don't understand governance vs. operations

**Single-issue focus:** "I just want to make sure you don't have any inappropriate books" suggests narrow agenda rather than holistic governance

**Unwillingness to collaborate:** Dismissive of others' opinions, "my way or the highway" attitude, inability to listen

**Conflicts of interest:** Business relationships that could benefit from board decisions; unwillingness to recuse themselves when appropriate

**Unrealistic availability:** Vague about schedule, mentions frequent travel, has multiple other board commitments

**Lack of preparation:** Hasn't looked at library website, doesn't know basic facts about the library, hasn't reviewed materials provided

**Resume building only:** More interested in the title than the work; asks mainly about what it looks like on their CV

Remember: One or two yellow flags aren't automatically disqualifying. Address concerns directly and give candidates a chance to clarify. But multiple red flags or evasive answers to direct questions suggest this isn't the right fit.

## Reference Checking

For finalists, consider checking references:

- Ask for 2-3 professional or community references
- Focus on questions about reliability, collaboration, and follow-through
- Useful questions: "Did they attend meetings consistently?" "How did they handle disagreement?" "Would you work with them again?"
- For candidates with no prior board experience, references from work, volunteer activities, or community organizations work well

## Making the Final Decision

Once you have interviewed candidates:

**Use a consistent evaluation process:** Consider creating a simple scoring rubric based on your priority qualifications

**Consider board composition holistically:** Don't just pick the "most qualified"; think about what your board needs as a whole

**For association libraries:** Follow your bylaws for nomination and election procedures

**For municipal/school district libraries:** Make a formal recommendation to the appointing authority with rationale

**Communicate clearly with all candidates:** Let them know your timeline; inform those not selected graciously, and thank them for their interest.

### Key Takeaways for Vetting and Selection

1. Distinguish between essential qualifications and nice-to-haves
2. Balance technical expertise with community representation
3. Use structured interviews to assess fit consistently
4. Watch for red flags but give candidates opportunity to address concerns
5. Check references for finalists
6. Consider board composition holistically, not just individual qualifications
7. Follow proper procedures for your library type when making final selections

## Section 4: Onboarding and Orientation

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You've recruited, interviewed, and selected great trustees. Now comes the critical work of setting them up for success. A thoughtful onboarding process helps new trustees understand their role, build relationships, and contribute effectively from the start.

### *Before the First Meeting*

The work begins before a new trustee attends their first board meeting. First impressions matter, and a welcoming, organized onboarding process signals that you value their service.

### *Welcome Packet*

Send new trustees a welcome packet 1-2 weeks before their first meeting. Include:

- **Board basics:** Meeting schedule for the year, board roster with contact information, committee descriptions
- **Governing documents:** Bylaws, charter (if applicable), board policies, code of ethics/conflict of interest policy
- **Operational context:** Current strategic plan, most recent annual report, current budget
- **Background reading:** Last 3-6 months of board meeting minutes, current major initiatives or projects
- **Practical information:** Meeting location and parking, whether meetings are in-person/hybrid/virtual, how to access meeting materials
- **New trustee resources:** NYS Handbook for Library Trustees, SALS trustee resources, upcoming training opportunities

- **Personal welcome:** A note from the board president welcoming them and expressing enthusiasm about their contribution

Don't overwhelm them with everything at once. Focus on what they need to read before the first meeting, and let them know additional resources are available when needed.

### *Essential Documents to Review*

Before attending their first meeting, new trustees should read (at minimum):

- Bylaws
- Current strategic plan
- Most recent board meeting minutes
- Current year budget
- Conflict of interest/ethics policy

### *Administrative Setup*

Handle the logistics:

- Add to board email distribution list or portal access
- Provide calendar invitations for upcoming meetings
- Explain how meeting materials will be distributed (email, board portal, packet)
- Collect any required paperwork (oath of office if not done at first meeting, emergency contact info)
- Introduce them to any board management tools or systems you use

### *The First Meeting*

Make the first board meeting welcoming and meaningful.

**Oath of office:** If required by law or bylaws, administer it at the beginning of the meeting. Make it ceremonial; this is an important moment.

**Introductions:** Go around the table with each trustee sharing their name, how long they've served, what they do professionally, and why they care about the library. New trustees should feel invited to share similarly.

**Assign a board buddy:** Pair each new trustee with an experienced board member who can answer questions, explain dynamics, and provide informal mentoring for the first few months.

**Acknowledge their contribution:** The board president should formally welcome them and express appreciation for their willingness to serve.

**Set participation expectations:** Make it clear that you want to hear from them. New trustees often hold back, thinking they should just observe initially.

After the meeting, the board buddy should check in: "How did that feel? Do you have questions about anything that came up?"

### *First 90 Days Orientation Plan*

Orientation isn't a one-time event; it's a process. Plan for new trustees to gain deeper understanding over their first three months:

#### **Month 1: Foundation**

- Attend first board meeting
- Library tour with the director (if not already done)
- Meet staff briefly; they don't need extensive introductions, just friendly faces
- Review welcome packet materials thoroughly
- Observe how meetings run and board dynamics

#### **Month 2: Deepening Knowledge**

- One-on-one coffee/lunch with board buddy to ask questions
- Attend a library program or community event
- Review committee descriptions and express interest in committee assignments
- Begin contributing actively in board discussions
- Complete any required training (e.g., ethics, open meetings law, harassment, etc.)

#### **Month 3: Full Engagement**

- Join a committee and attend first committee meeting
- Take on a small task or project to contribute concretely
- Meet with director for deeper conversation about library operations and challenges
- Attend SALS or NYS trustee training if available
- Check in with board president: "How am I doing? What else should I be learning?"

### *Ongoing Trustee Development*

Orientation doesn't end after 90 days. Strong boards invest in continuous learning:

**Annual trustee training:** Take advantage of SALS workshops, New York Library Association events, webinars, conferences

**Periodic governance refreshers:** Dedicate meeting time annually to review board roles, fiduciary duties, current best practices

**Board self-assessment:** Evaluate board effectiveness annually and identify areas for improvement or learning

**Strategic planning participation:** Include all trustees in strategic planning processes; it's educational and builds ownership

**Topic-specific learning:** When facing major decisions (building projects, policy changes, new programs), provide background education for the whole board

**Mentoring culture:** Experienced trustees should actively support newer members, creating a culture of learning

### **Key Takeaways for Onboarding**

1. Start before the first meeting with a comprehensive welcome packet
2. Make the first meeting welcoming and explicitly invite participation
3. Assign board buddies for informal mentoring and support
4. Plan a 90-day orientation process, not just a one-time event
5. Provide library tour and staff introductions
6. Connect new trustees to SALS and state-level trustee resources
7. Invest in ongoing trustee development for all board members
8. Create a culture where questions are welcomed and learning is continuous

### **Section 5: New York State Legal Requirements**

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- Association libraries (Education Law Section 226)
- Municipal libraries (Education Law Section 255)
- School district libraries (Education Law Sections 1950-1952)
- Common requirements across all library types

## Section 6: Templates and Tools

The following templates are designed to be customized for your library.

### Template 1: Board Composition Matrix

**Purpose:** Map current trustees' skills, demographics, community connections, and term expirations to identify gaps.

Trustee Name	Primary Expertise	Secondary Skills	Community Connections	Neighborhood/Demographics	Term Expires
Example: Jane Smith	Finance/CPA	Nonprofit governance	Rotary, Chamber	Downtown, 50s	2027

## Template 2: Skills Gap Analysis Worksheet

**Purpose:** Identify what expertise and perspectives your board needs most.

**Instructions:** Complete this worksheet with both board and director input.

**Priority levels:** Critical (needed within 6 months), Important (would significantly help within 1 year), Valuable (nice to have but not urgent).

Skill/Expertise Area	Currently Have?	Why We Need It	Priority Level
Finance/Accounting			
Legal			
Architecture/Construction			
Human Resources			
Marketing/Communications			
Fundraising			

## Template 3: Trustee Role Description

**Purpose:** Provide prospects with clear information about trustee responsibilities, time commitment, and qualifications.

[YOUR LIBRARY NAME]

### Board of Trustees Position Description

#### About Our Library

[Brief description of your library, community served, and mission. 2-3 sentences.]

#### Trustee Responsibilities

As a member of the [Library Name] Board of Trustees, you will:

- Provide governance and strategic direction for the library
- Establish and monitor library policies
- Approve and oversee the library budget and financial management
- Hire, support, and evaluate the library director
- Advocate for the library in the community
- Ensure the library complies with applicable laws and regulations
- Plan for the library's future needs and growth

#### Time Commitment

- Monthly board meetings: [Day of month], [time], approximately [duration]
- Committee work: [Describe committee structure and time requirements]
- Special events and community engagement: [Approximate frequency]
- Total estimated commitment: [X hours per month]

#### Term

[Specify term length per your bylaws/Education Law requirements for your library type]

#### Qualifications

We seek trustees who:

- Care deeply about libraries and their role in our community
- Bring diverse perspectives, experiences, and expertise
- Can commit to regular meeting attendance
- Work collaboratively with fellow board members and library staff
- Understand the difference between governance and day-to-day operations
- [Add specific expertise needs: financial oversight, legal knowledge, construction/facilities, etc.]

### **What You Will Gain**

- Meaningful community impact
- Leadership and governance experience
- Connection to community members and organizations
- Professional development opportunities through trustee training
- The satisfaction of supporting a vital community resource

### **How to Apply**

[Include application process specific to your library type]

## Template 4: Interview Question Bank

**Purpose:** Structured questions to assess candidate fit, commitment, and understanding of the trustee role.

### Questions About Motivation and Community Connection

- What draws you to library board service at this time?
- How do you use our library? What do you value most about it?
- What connections do you have in our community?
- What do you see as the library's most important role in our community?

### Questions About Commitment and Availability

- Can you commit to attending monthly board meetings on [day/time]?
- Are there predictable conflicts we should know about?
- Are you willing to serve on a committee? Which area interests you most?
- This is a [X]-year term. Can you commit to serving the full term?

### Questions About Governance Understanding

- What do you see as the difference between the board's role and the director's role?
- Have you served on a nonprofit board before? What did you learn from that experience?
- How would you handle a situation where you disagreed with a board decision?
- What does good governance mean to you?

### Questions for Candidates with Specific Expertise

- How do you see your professional expertise contributing to the board's work?
- Can you distinguish between providing professional insight and doing pro bono consulting work?
- Are there potential conflicts of interest we should discuss?
- Are you comfortable providing expertise while also learning about library-specific considerations?

## Template 5: Letter to Appointing Authority

(For Municipal and School District Libraries)

**Purpose:** Communicate desired trustee qualifications to the town board or school board when a vacancy arises.

[Date]

[Town Board/School Board Name]

[Address]

Dear [Appointing Authority]:

On behalf of the [Library Name] Board of Trustees, I am writing to provide input regarding the upcoming trustee vacancy that will occur when [trustee name]'s term expires on [date].

As you consider candidates for this appointment, we wanted to share information about the skills and perspectives that would most benefit the library board at this time.

Our board has conducted a skills assessment and identified the following areas where additional expertise would strengthen our governance:

- [List 2-3 priority skill areas based on your board composition analysis]

Additionally, we are committed to building a board that reflects the diversity of our community. We welcome candidates who bring varied perspectives, professional backgrounds, and community connections.

The library board meets [monthly/frequency] on [day] at [time]. Trustees also serve on committees and participate in community engagement activities. The time commitment typically ranges from [X-Y] hours per month.

We are happy to answer any questions about the role or to meet with prospective candidates to discuss what library board service entails.

Thank you for your consideration. We look forward to working with the trustee you have appointed.

Sincerely,

[Board President Name]

Board President, [Library Name]

