

KDLA November 2011 Trustee Tip of the Month ***Trustee Orientation: What Does a New Trustee Need to Know?***

Quick Tips

- ◆ It is important for each new trustee to be provided with a complete and thorough orientation to the library and the trustee's job and duties.
- ◆ There are many documents that the new trustee will need to have or be aware of in order to gain the background information and knowledge necessary to be in compliance with the KRS and to be an effective trustee. These documents can be compiled into a binder for easy distribution and future reference.
- ◆ Your KDLA regional librarian can assist with orientation of a new trustee and provide additional information pertaining to KDLA services, library laws, and state-wide initiatives.
- ◆ The orientation is just the beginning of a trustee's education on the core skills needed to be an effective and successful library board trustee. Continuing education on each of these skills is highly recommended.

Once a library board trustee has been appointed and taken the oath of office, the next step for the new trustee is to be provided with the background, information, and tools needed to understand the duties and responsibilities that are part of the job. The best way to ensure that the new trustee is provided with everything needed to get a great start is to provide a step-by-step orientation program. An effective orientation will be a collaborative program shared by the library director, board president, and the KDLA Regional Consultant.

Having a well-designed plan provides the orientation team with a tool that will ensure that new trustees get everything they need to be an effective trustee and will put the trustee on the path of gaining the specialized knowledge needed for governing a library district - whether it consists of one library building or many branches.

Once the new trustee has been appointed, the first step will be for either the Director or the Board President to contact her to welcome her to the Board and set up an appointment to have an orientation session. The director can assist in scheduling an opportunity for the regional librarian to provide additional orientation information in conjunction with, or in addition to, the library orientation.

There is no specific order that an orientation must follow but an easy way to start may be with a tour of the library facilities and an introduction to the library staff. During the tour, some topics to address and discuss are:

- ◆ How the library is organized and governed
- ◆ How the library is funded
- ◆ How the library is operated on a day-to-day basis
- ◆ How the library is linked to other resources and libraries
- ◆ How the library serves the needs of the community
- ◆ How the library could better serve the community.

The tour and introductions will allow the new trustee to ask questions in context as they view the different services, activities, and areas of the library facilities.



An effective way to provide the new trustee with all of the documents that are needed is to organize them into a binder. Documents to include in the notebook are:

- ◆ The *KY Public Library Trustee Manual* (currently being revised)
- ◆ A list of board members with their contact information, terms of office, and offices held
- ◆ The location and schedule of board meetings; board bylaws and policies; and
- ◆ An example agenda.

Also included should be the documents that each trustee is required to receive within 60 days of their appointment: [*Your Duty Under the Law*](#); [*Managing Government Records*](#); and the [*Proof of Receipt*](#) to acknowledge that those two documents have been received. When the *Proof of Receipt* has been signed, you will need to keep a copy of that signed document on file at the library.

While there are many other documents from which trustees can learn more about the library and the services provided to satisfy the library needs of the community, a few that you might also include in the new trustee's binder are:

- ◆ The library's latest Annual Report
- ◆ The library's Standards Report
- ◆ The library's long-range or strategic plan
- ◆ The library's current and previous year's budget
- ◆ The library's Tax Rate (taxing districts only)
- ◆ Board packets from the previous three months meetings, including minutes, statistics, and financial reports
- ◆ An organizational chart of the library staff with names and titles
- ◆ A copy of the library's policies
- ◆ Brochures or other concise information about the library or library services
- ◆ PR or information on any recent library accomplishments.

It is important for the Director or Board President to take the time to discuss the meaning and value of all of these documents, even if they are not included in the orientation binder. Providing the new trustee with as much information and support as possible in learning how libraries operate and specifically how *your* library operates will give the trustee the background needed to enter this new position with more comfort and confidence.

An important issue for the new trustee to understand is the board's relationship to the library director, the library staff, and the community. Often there is some confusion about the difference between governing and managing. An example of the difference can be seen in the board's job of policy adoption. The trustee will be involved in creating a policy and officially adopting it, but it will be the library director who will implement the policy and is responsible to create the procedures used in applying that policy in the day-to-day management of the library.

Another difference to note is that the library director is the only employee of the board. While the trustees will take the responsibility of hiring and evaluating the library director, it is the director who will be responsible to hire, train, supervise, and

oversee the work of all of the other employees in the library. It is important to get to know the staff and the jobs they hold in the library, but the trustee must allow the director to deal with any issues that a library employee may have. The first question a trustee can ask if an employee approaches a trustee with a problem is, "Have you discussed this with the library director?" The trustee would not want to undermine the authority of the library director nor become enmeshed in an employee situation best handled by that employee's supervisor. The trustee's job description and the difference in the roles and responsibilities of the trustee and director will be covered in more detail during the regional librarian's orientation.

As a new library trustee, it is important to realize that you represent the library to the community and you are responsible to bring community desires and concerns to the attention of the board. While a trustee will be a wonderful advocate for the library in the community, the trustee has to remember that an individual trustee alone cannot make any decisions, commitments, or take any actions in the name of the library board. All official library business that will lead to any commitments or actions to be taken must be handled by the entire board, making decisions together in a quorum.

In addition to orienting the new trustee to the local library, the KDLA regional librarian will have more detailed information to share with the new trustee regarding KDLA services and legal issues which impact the trustee's responsibilities. During the orientation, the regional consultant will cover:

- ◆ The trustee's job description
- ◆ The *KY Public Library Trustee Manual* including:
 - Library board statutory powers and duties
 - Board relationship to the library director, the library staff, and the community
 - KY Revised Statutes on library issues
 - Example meeting minutes
 - Trustee self-assessment
 - Important dates, including legal requirements and deadlines
- ◆ KDLA's structure, functions and services, including:
 - What to expect from KDLA's regional consultants
 - The *KDLA Organizational Chart* and *KDLA Regional Map*
 - The trustee page on KDLA Website
 - Trustee Tips
 - Example library policies
 - KDLA CE for trustees (forums, workshops, online training opportunities)
- ◆ Legal Issues, including:
 - *Your Duty Under the Law: Open Meetings/Open Records*
 - *Managing Government Records*
 - *Directions for Going into Executive Session*
 - Records Retention Schedules
- ◆ *Kentucky Public Library Standards*

Another important part of the orientation is what is sometimes referred to as the “slow-motion board meeting.” During the first few meetings that a new trustee attends, it is helpful and advisable to take a little extra time and explain the background on the business being discussed and the various motions being made and actions taken. This will help the new trustee to understand how business is handled and provide the trustee with the opportunity to ask questions about processes and procedures that may seem puzzling to a new member of the board.

There is a lot of information that a new trustee must have time to absorb to understand the many board procedures and library issues that are part of serving as a library board trustee. A thorough and complete orientation will give the new trustee the foundation needed to serve and govern successfully. The orientation process is just the beginning of the trustee’s education on gaining an expert knowledge on handling the various duties of the library board trustee’s job.

Following up the orientation with in-depth training on each of the top duties that the library board trustee will want to master is essential to good governance practices that impact the current services and the future of the library. Once the new trustee has had time to learn the basics, it is suggested that the trustee seek out training or workshop opportunities to learn more about the primary duties of a trustee:

1. Hiring and evaluating the library director
2. Monitoring the libraries budget and finances and the effectiveness of library services
3. Creating and adopting policies
4. Planning for the future - strategic and long-range planning
5. Advocacy within the community and with local, state, and federal officials
6. Practicing good board management, including recruiting future trustees, orientation and continuing education, meeting management and evaluating board practices to improve organizational procedures.

The library director and the regional librarian will be able to provide information on opportunities for further continuing education. Most of these seminars, workshops, or classes will be free to the library trustee. KDLA provides a Continuing Education Consultant who can also provide additional information on learning opportunities. And, there is an online calendar of CE events on the KDLA Website at: <http://kdla.ky.gov/librarians/staffdevelopment/Pages/ContinuingEducationCalendar.aspx> where you can sign up to learn more about various library-related issues.

The regional librarian attends many of the library’s board meetings and is available as a resource for questions or additional information when needed. KDLA’s entire Field Services Division works to provide you with the support, information, and continuing education opportunities the library trustee needs to continue to grow and develop skills to serve effectively and in compliance with library laws.

If you would like additional information or assistance with a trustee orientation, please contact your Regional Librarian. You can locate the name, address, and contact information for your Regional Consultant at:

<http://kdla.ky.gov/librarians/plssd/Documents/regionalconsultants.pdf>.