

Trustee Orientation Checklist

It is the recommendation of KDLA that a new trustee will begin his/her term with an orientation consisting of an introduction and overview of the library and board procedures and documents. This first step will be provided by the library director with the support and assistance of the board trustees.

The library director will coordinate with the regional consultant on providing the new trustee orientation within 3 months of the trustee's new appointment.

It will be the responsibility of the Regional Consultant/Library Director to obtain signatures and forward the completed checklist to the Continuing Education Consultant's Office at KDLA.

1. The board president/designee or the library director will contact the new trustee to welcome him/her to the board and schedule the orientation session or sessions.
 - Board representative
 - Director
 - _____ (Date)
 - Trustee took the oath of office from the County Judge/Executive or a notary public on _____ (Date).
2. The library director will share the following information with the new trustee:
 - A. These items must be handed to the trustee at the orientation:**
 - KY Public Library Trustee Manual* <http://kdla.ky.gov/librarians/trustees/Documents/Trustee%20Manual.pdf>
 - List of board members, indicating terms of office and board officers, and committee members and advisory board members (if applicable)
 - Location, schedule, and conduct of meetings (sample agenda)
 - Board bylaws & policies
 - Your Duty Under the Law*: <http://ag.ky.gov/civil/civil-enviro/orom/Documents/YourDutyUndertheLaw.pdf>
 - Managing Government Records*: <http://ag.ky.gov/civil/civil-enviro/orom/Documents/ManagingGovernmentRecordsFinal.pdf>
 - Proof of Receipt*: <http://ag.ky.gov/civil/civil-enviro/orom/Documents/proofofreceipt.pdf>
 - B. These items should be discussed or made available for review upon request:**
 - Library's latest Annual Report
 - Library's long-range/strategic plan
 - Library's current year's budget
 - Tax Rate (taxing districts only)
 - Organizational chart or list of the library staff with names and titles
 - Library's policies
 - Brochures or other concise information about the library or library services
 - Recent library accomplishments
3. The orientation will include a tour of the library and an introduction to the staff.
 - Tour given by _____ on _____ (date)
 - Items to discuss on the tour:
 - How the library is organized and governed
 - How the library is funded
 - How the library is operated day to day
 - 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

Trustee **Date**

Director **Date**

Library Name

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The regional consultant will share more detailed information on the following items:

- KDLA Welcomes You as a New Public Library Trustee!*
 - Trustee Job Description: <http://kdla.ky.gov/librarians/trustees/Documents/KDLA%20Welcomes%20You.pdf>
- What to Expect From KDLA's Regional Consultants:*
<http://kdla.ky.gov/librarians/Documents/KDLARegionalConsultants.pdf>
- KY Public Library Trustee Manual* <http://kdla.ky.gov/librarians/trustees/Documents/Trustee%20Manual.pdf>
 - Library board statutory powers and duties
 - Board relationship to the library director, the library staff, and the community
 - KRS on library issues
 - Sample minutes
- KDLA Organizational Chart: <http://kdla.ky.gov/common/aboutkdla/Documents/kdlaorgchart.PDF> and
Regional Map: <http://kdla.ky.gov/librarians/plssd/Documents/RegionalMap.pdf>
- Trustee page on KDLA website: <http://kdla.ky.gov/librarians/trustees/Pages/default.aspx>
- Important Dates; including legal requirements and deadlines
- Your Duty Under the Law: Open Meetings/Open Records:*
<http://ag.ky.gov/civil/civil-enviro/orom/Documents/YourDutyUndertheLaw.pdf>
 - Please remember that most documents regarding library business are public records. This includes paper documents, e-mails, texts, etc.
- Managing Government Records:*
<http://ag.ky.gov/civil/civil-enviro/orom/Documents/ManagingGovernmentRecordsFinal.pdf>
- Directions for Going into Executive Session:* <http://kdla.ky.gov/librarians/Documents/ExecutiveSession.pdf>
- Sample Library Policies: <http://kdla.ky.gov/LIBRARIANS/LIBRARYPOLICIES/Pages/default.aspx>
- Kentucky Public Library Standards:* <http://kdla.ky.gov/librarians/plssd/Pages/LibraryStandards.aspx>
- Trustee Tips: <http://kdla.ky.gov/librarians/trustees/Pages/TrusteeTips.aspx>
- KDLA CE for trustees (forums, workshops, online training opportunities)
- Trustee Voluntary Certification
- Records Retention schedules:
 - *Public Library and Library Board Records Retention Schedules:*
<http://kdla.ky.gov/records/recretentionschedules/Documents/Local%20Records%20Schedules/PublicLibraryRecordsRetentionSchedule.pdf>
 - *Local Governments General Records Retention Schedule:*
<http://kdla.ky.gov/records/recretentionschedules/Documents/Local%20Records%20Schedules/LocalGovernmentGeneralRecordsRetentionSchedule.pdf>

Trustee	Date

Regional Consultant	Date

Trustee (Printed Name)

Library Name