

Example Director Orientation Checklist

Before a trustee can become certified, they must take part in orientations conducted by the Library Director and the KDLA Regional Library Consultant. Below are examples of material to cover.

1. The board president, designated trustee, or the library director will contact the new trustee to welcome them to the board and schedule an orientation.
 - ☐ Board representative
 - ☐ Director
 - ☐ _____ (Date)
 - ☐ Trustee took the oath of office on _____ (Date).
2. The library director will share the following information with the new trustee:
 - ☐ [Trustee Manual](#)
 - ☐ List of board members, terms of office, board officers, and advisory board members (if applicable)
 - ☐ Location, schedule, and conduct of meetings (sample agenda)
 - ☐ Board bylaws & policies
 - ☐ [The Kentucky Open Records & Open Meetings Acts: A guide for the public and public agencies](#)
 - ☐ [Managing Government Records](#)
 - ☐ Proof of Receipt – found on the last page of the open records & meetings guide

Additional, helpful documentation that may be provided:

- ☐ Library's latest Annual Report
- ☐ Library's long-range/strategic plan
- ☐ Library's current year 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:

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| ☐ How the library is organized and governed | ☐ How the library is linked to other resources and libraries |
| ☐ How the library is funded | ☐ How the library serves the needs of the community |
| ☐ How the library is operated day to day | ☐ How the library could better serve the community |