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 Consultant. Below is an example of what could be covered during a director-led orientation.

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 on ____________ (Date).

2. The library director will share the following information with the new trustee:

   A. These items could be handed to the trustee at the orientation:
   - KY Public Library Trustee Manual
   - 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
   - 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 Kentucky Open Records & Open Meetings guide)

   B. These items could be discussed or made available for review upon request:
   - 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:
   - 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
Example Regional Consultant Orientation Checklist

Before a trustee can become certified, they must take part in orientations conducted by the Library Director and the KDLA Regional Consultant. Below is an example of what would be covered during a Regional Consultant-led orientation. If the Consultant is unable to conduct an orientation, the trustee may watch the two Trustee Certification orientation videos on KDLA’s website instead.

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

- **What to Expect from KDLA’s Regional Consultants**
- **KY Public Library Trustee Manual**
  - 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 and Regional Map**
- **Trustee page** on KDLA website
- **Important Dates; including legal requirements and deadlines**
  - **KY Public Library Calendar**
- **The Kentucky Open Records & Open Meetings Acts: A guide for the public and public agencies**
  - Please remember that most documents regarding library business are public records. This includes paper documents, e-mails, texts, etc.
- **Managing Government Records**
- **Directions for Going into Executive Session (Page 30 of the Trustee Manual)**
- **Sample Library Policies**
- **Kentucky Public Library Standards**
- **KDLA CE for trustees (forums, workshops, online training opportunities)**
- **Trustee Certification Program**

In place of the above Checklist, the Trustee has:
- Agreed to view the two Trustee Certification orientation videos on KDLA’s website.