

## 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:

- |  |   |
|--|---|
| <input type="checkbox"/> How the library is organized and governed | <input type="checkbox"/> How the library is linked to other resources and libraries |
| <input type="checkbox"/> How the library is funded                 | <input type="checkbox"/> How the library serves the needs of the community          |
| <input type="checkbox"/> How the library is operated day to day    | <input type="checkbox"/> 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](#)
- [Sample Library Policies](#)
- [Kentucky Public Library Standards](#)
- [Trustee Tips](#)
- KDLA CE for trustees (forums, workshops, online training opportunities)
- Trustee Voluntary Certification

**In place of the above Checklist, the Trustee has:**

- Agreed to view the two Trustee Certification [orientation videos](#) on KDLA's website.