

Trustee Orientation: Things Every Trustee Should Know

Responsibility for planning and conducting the new trustee orientation is shared with the board president, other board members, and the library director. The specifics will vary depending on your library governance structure and relationship to the community you serve.

All new trustees should receive a tour of the library, an opportunity to meet the staff, and an orientation to the library's website and online resources. It is considered best practice to provide every library trustee with a specific library e-mail account to clearly distinguish library-related email correspondence from personal email (since library-related email may be subject to public records requests).

All trustees should receive information on the items below:

Names and contact information of the following:

- o board members (and years of term expiration – if applicable)
- o library staff
- o key volunteers
- o officers of the Friends of the Library group
- o select board members/commissioners/supervisors/trustees of jurisdiction(s) served
- o clerks of jurisdiction(s) served
- o administrator/manager of jurisdiction(s) served

Names of library board officers

List of board committees and members of each

Schedule of board meeting dates

Copy of the California Trustees Toolkit (or Toolkit link)

Type of library (city, county, special district, JPA, etc.)

Who owns the library building and how the building is run/maintained

Board yearly calendar detailing monthly tasks

Board by-laws

Ralph M. Brown Act (open meetings law) information

Library policies

Staff job descriptions

Library hours, phone number, website address, services provided

Library annual report

Current major projects

Recent promotional materials

Recent accomplishments and challenges

Current partnerships with other organizations in the community

Library card (if needed)

Library mission and goals

Long range/strategic plan

Technology plan

Library history summary

Census profile(s) of jurisdiction(s) served

Current year's budget and latest financial statement

Detail of how library is funded – including where funding comes from and percentage of overall budget from each source

Annual building inspection to assess physical condition, appearance, safety

Minutes of past board meetings

Past librarian's reports and information

Where can we go for help?

- [Trustee Toolkit](#)
- [California State Library—Library Development Services](#)
- [California Library Association](#)
- [California cooperative library systems](#)
- [United for Libraries](#) (American Library Association)
- [California Public Library Advocates](#)