

Sample trustee orientation agenda

I. Welcome

II. Duties and role of the board versus duties and role of the director

III. Library structures in California

- A. State library
- B. Library association
- B. Library cooperative system (if applicable)
- C. Funding for your library (local, state, federal, etc.)

IV. Important policies and laws

- A. Local law
- B. State law
- B. Personnel policies
- C. Unattended children policy
- D. Patron privacy policy
- E. Board bylaws

V. Budget

- A. Review of prior month's report
- B. Review of different reserve accounts

VI. Library tour

VII. Strategic plan review

The orientation usually takes about two to three hours. The trustee should leave with a good knowledge of how the library runs, how the board meetings run, and any projects that the library is currently working on. This will help bring the new trustee up to speed at their first meeting.

Once the orientation is complete, the training is not done. Offer trustees to attend local continuing education opportunities.

Like any job, it takes about a year to learn. But unlike an employee, trustees are only attending meetings once a month. Directors should review their agendas each month and identify common items like policies and budgets and reach out to new trustees during the initial year to offer additional information.

At the end of the day, directors and staff need to remember that new trustees need to be on-boarded just as staff do. Welcoming them into the library and making sure they have the information and background they need to succeed will help create a committed and engaged board.

Adapted from the Public Library Director's Toolkit (American Library Association, 2019).