

# TRUSTEE TOPICS

Prepared by the  
Kansas State Library and the  
Kansas Library Trustee Association

## ORIENTATION OF NEW TRUSTEES

### GOAL:

The goal of this KLTA guideline is to help library directors and trustees build on the successful recruitment of potentially excellent trustees by giving new trustees the information that will help them function as effective board members. A good trustee orientation program is an essential tool in building a good library board.

### BACKGROUND:

New members of the library board should be provided with information that will:

- help them feel more comfortable with their duties and responsibilities
- give them confidence as they begin their new job
- get them involved early in their tenure.

Trustees are more effective if they know how the library functions and what is expected of them.

Orientation should start as soon as possible after the new member is appointed. This will give the new trustee an opportunity to get to know the library director, the staff and the board chair and to ask questions about the library and its services.

Those who conduct the orientation should keep in mind that adults have different learning styles that must be respected. Extrovert and

articulate trustees will derive the most benefit from informal interviews. Others will prefer to absorb written material at their own pace.

Pragmatic, task-oriented trustees may be a bit impatient with the orientation package but will learn quickly once the job starts.

## THE ORIENTATION PROCESS:

New trustees should meet with the library director to learn how the library is:

- defined and supported in state statutes
- organized and governed
- funded and budgeted
- operated day-to-day
- structured to serve the needs of the community
- linked to systems and other libraries
- related to the board of trustees.

New members should meet with trustee representatives to learn about the board:

- officers and committees
- meeting location and schedule
- responsibilities and expectations
- goals, long-range plans and projects in progress
- accomplishments
- relationship to the library director.

New members should be given a kit that includes:

- Kansas State Statute 12-1225
- list of board members with names, addresses and phone numbers
- bylaws of the board
- minutes of the previous year's board meetings
- staff list, with position descriptions
- library policy manual
- library strategic plan

- most recent annual reports
- statistical reports on circulation and services
- current budget and financial reports
- community analyses, with demographic, economic and employment trends.

#### ACTION STEPS:

If the public library does not have an orientation program for new trustees, the board may appoint a committee to work with staff to develop the procedures and materials. Or the library director may put together an orientation package for the board's review, discussion and formal approval.

The best and most subtle training tool a new board member can have is a library board that is already functioning efficiently. The new trustee will quickly learn that they must do their homework if they hope to be respected and effective.

Both staff and trustees should be trained to encourage new board members to ask a lot of questions. All questions should be answered in a friendly fashion that will elicit more questions.

Both staff and trustees should be reminded that a new trustee is not only new to their responsibilities but looking at the library with a fresh, new viewpoint. A new trustee often has ideas that prove very valuable to the library.

It is often valuable for the director and/or board chair to conduct an exit interview with trustees who are leaving the board. These trustees can suggest improvements for both the orientation program and the board procedures.

#### SOURCES:

Some of the material in this document was adapted from *The Virginia Public Library Trustee Handbook*, Section II, pp.5-6, 1997.