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CHAPTER TWENTY-ONE

Trustee Orientation and Continuing Education

Trustee Orientation

To carry out their duties effectively, new trustees need information about the library's services, needs, and plans. They also need some understanding of the legal responsibilities of the library board and the relationship of the board to the municipality, and to the library director and other library staff. A good orientation will provide new trustees with the answers they need to undertake their duties confidently.

The orientation program should be planned step by step by the library board, with the assistance of the library director. Orientation should start as soon as possible after the new board member is appointed—before the first meeting, if possible. See the attached *Sample Trustee Orientation Outline* for ideas.

Trustee Continuing Education

Even the most knowledgeable and experienced library trustee needs continuing education to stay informed about new laws, new technologies, and new possibilities for library service. Library services and library policies must constantly change to keep pace with changing community needs, new laws, and new technologies. Library leaders, including library trustees, who stay informed on these changes will be better able to provide high-quality library service to their community.

Probably the most valuable type of continuing education experience for trustees is attendance at system or statewide workshops or at conferences such as the annual Maine Libraries Conference or regional trustee forums. One of the most rewarding aspects of regional and statewide workshops is the opportunity to share experiences and ideas with trustees from other libraries. Information about these forums and conferences is available at the Maine State Library website or through your district consultant.

Because trustees are busy people with many commitments, it may be difficult to find the time to participate in many workshops and conferences. Fortunately, there are many other ways to learn and stay informed. The Maine State Library provides access to many in-person and online workshops for staff and trustees to learn about a variety of library issues. These can be accessed for free via the Maine State Library Event Calendar <http://evanced.info/maine/evanced/eventcalendar.asp> and Voluntary Public Library Certification Program www.maine.gov/msl/libraries/ce/libcert.shtml. You do not have to work towards a library certificate to view any workshops of interest.

Many of these workshops don't require special access but if you have any questions, contact Stephanie Zurinski at stephanie.zurinski@maine.gov to set up access to these online workshops.

United for Libraries www.ala.org/united/training/webinars also offers free and fee-based training programs. In addition, Appendix D of this manual includes many helpful tip sheets to assist trustees in performance of their duties.

Library News and Continuing Education Opportunities

Your state library website and e-mail discussion lists are great sources of regional and statewide library news and education opportunities. The national association, United for Libraries, also publishes a member newsletter which contains news and information important to library trustees.

For instructions on how to subscribe to various library-related e-mail lists, go to www.maine.gov/msl/libs/listservs.htm and choose the lists you wish to join.

We recommend all trustees join MEINFO-L and LIBTRUST-L Melib-Trustee@lists.maine.edu to keep up on Maine library news and important announcements for trustees. You can also join ALA's national e-mail list for trustees at <http://lists.ala.org/www/info/trustees> and the one for Friends at <http://lists.ala.org/www/info/friends>.

Membership in the Maine Association of Nonprofits (MANP) www.nonprofitmaine.org/ provides board members access to online educational materials as well as opportunities to attend relevant workshops on various aspects of operating nonprofit organizations. MANP also has staff who can offer advice on nonprofit legal and financial matters.

Your library district consultant is also a great source of information on how you can learn more about library and board operations and how to better advocate for your community library.

Other Continuing Education Ideas

Brief continuing education sessions can be held during library board meetings. This is a way to reach every trustee on the board and also a way to involve the board in brainstorming or problem-solving discussions on issues that may be important to the library. Short videos on library trustee topics are available at the Maine State Library website www.maine.gov/msl/libs/admin/trustees.htm.

The chapters that make up this handbook can be used for short continuing education sessions held during regular or special board meetings. The meeting agenda should alert board members that a particular chapter will be reviewed at the next board meeting. Each board member should read the chapter in advance of the meeting and bring to the meeting any questions or thoughts concerning the issues raised by the chapter. Perhaps a board member with experience on

the topic to be covered, the library director, or the library district consultant could lead the discussion.

Keep in mind that the Maine State Library offers professional consulting services to library staff and boards. These consultants are knowledgeable about a wide range of library practices and issues, as well as new laws and new technologies that may be of interest to your library. Consider inviting a library district consultant or other expert to lead a continuing education session at a regular or special board meeting.

Budgeting for Trustee Continuing Education

The annual library budget should include funding for trustee continuing education. Funding should be provided to pay the expenses for trustees to attend library district workshops and send at least one trustee per year to the annual Maine Libraries Conference. Funding should also be provided for at least one trustee's membership in the national association United for Libraries.

Sources of Additional Information

- Sample Trustee Orientation Outline (attached)
- District Library Consultant contact information
www.maine.gov/msl/libs/districts/
- United for Libraries [Association of Library Trustees, Advocates, Friends and Foundations (ALTAFF)] www.ala.org/united/
- Maine Association of Nonprofits (MANP) www.nonprofitmaine.org/
- Maine State Library, Trustees and Friends webpage
www.maine.gov/msl/libs/admin/trustees.htm
- Maine State Library Calendar of Events and Workshops
<http://evanced.info/maine/evanced/eventcalendar.asp>
- To subscribe to the Maine Library Trustee Electronic Discussion List
MELIB-Trustee@lists.maine.edu

Sample Trustee Orientation Outline

Your library's orientation program can generally follow these steps:

1. The board president (or library director or other board designee) should contact the new trustee to welcome him/her to the board and schedule the orientation session or sessions.
2. Immediately send the new trustee a packet that includes:
 - a copy of this handbook
 - a copy of meeting ground rules
 - bylaws of the board
 - a list of board members, indicating terms of office and board officers
 - board committee membership lists
 - calendar of upcoming meetings

At a later point, you may also wish to share the following information with the new trustee:

- the library's latest annual report
 - the library's long-range/strategic plan and current technology plan (if any)
 - the library's policies
 - the library's current and previous year's budget
 - the board's meeting minutes for the previous six months
 - the director's reports for the previous six months
 - the latest monthly statistical report and financial report
 - an organizational chart of the library staff with names and titles
 - the library board's annual calendar, including legal requirements and deadlines
 - Maine Revised Statutes Title 27
 - copy of the Maine Library Commission's *Standards for Public Libraries*
 - copy of a brochure or other information about Maine's Regional Library System and Maine State Library
3. The orientation should include a tour of the library, with the director, to introduce staff and discuss library programs and services.
 4. The orientation should include meetings with the library director (and perhaps a library board representative) to discuss library services, library plans, and other important issues.

A possible plan for the remainder of the orientation program could be as follows:

- a. A meeting/discussion with the library director to learn:
 - how the library is organized and governed
 - how the library is funded
 - how the library is operated day to day
 - how the library serves the needs of the community
 - how the library is linked to other resources, other libraries, and the library system

- how the library could better serve the community
- b. A meeting/discussion with one or more board representatives to talk about:
 - library board statutory powers and duties (review Chapter 4: *Who Runs the Library?*)
 - board bylaws, organization, officers, and committees (review Chapter 5: *Bylaws—Organizing the Board for Effective Action*)
 - location, schedule, and conduct of meetings (review Chapter 6: *Effective Board Meetings and Trustee Participation*)
 - responsibilities and expectations of board members (review Chapter 3: *The Trustee Job Description*)
 - library long-range plans, and the status of activities to meet the objectives of those plans (review Chapter 13: *Planning for the Library's Future*)
 - recent library accomplishments
 - board relationship to the library director, the library staff, and the municipality (review Chapter 4: *Who Runs the Library?*)

