

Trustee Orientation and Continuing Education

This Trustee Essential covers:

- *The importance of new trustee orientation*
- *Why continuing education is essential for all trustees*
- *Opportunities for continuing education even for busy trustees*

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 of 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 Wisconsin Association of Public Libraries (WAPL) and Wisconsin Library Association (WLA) conferences. One of the most rewarding aspects of system and statewide workshops is the opportunity to share experiences and ideas with trustees from other libraries. Information about these workshops and conferences is available in your system newsletter.

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.

Newsletters

Your library system's (print and/or electronic) newsletter is a great source of regional and statewide library news and developments. Another excellent source of statewide library news is *Channel*, a newsletter published every other month by the Division for Libraries, Technology, and Community Learning. Its primary purpose is to provide information on

services of the DLTCL and matters of interest to libraries and school libraries / media centers in Wisconsin. Copies of *Channel* are provided to every library and library system in Wisconsin for distribution to every trustee. *Channel* includes a regular column, "Trustee Corner," which deals with questions and issues commonly faced by library trustees.

One of many benefits to membership in the Wisconsin Library Trustee Association (WLTA) is the WLTA newsletter, which contains news and information important to Wisconsin library trustees.

If you have email, you can keep up on the latest statewide library information and news by subscribing to *Channel Weekly*, DLTCL's electronic newsletter. Instructions for subscribing to *Channel Weekly* are available at <http://www.dpi.state.wi.us/dltcl/eis/chwksbsc.html>.

The DLTCL sponsors an email discussion list, WISPUBLIB, as a way to allow the Wisconsin public library community to share news and ideas and to get answers to questions about public library services, policies, laws, etc. The Division strongly encourages all public library and library system staff and trustees, as well as anyone with an interest in public library issues, to subscribe to this email list and participate in the discussions. Instructions for subscribing to WISPUBLIB and for sending messages to the list are available at <http://dpi.wi.gov/pld/wispublib.html>.

Other continuing education ideas

Short continuing education sessions can be held during library board meetings. This is a way to reach every trustee on the board (hopefully) and also a way to involve the board in brainstorming or problem-solving discussions on issues that may be important to the library.

The *Trustee Essentials* 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 *Trustee Essential* will be reviewed at the next board meeting. Each board member should read the *Trustee Essential* in advance of the meeting and bring to the meeting any questions or thoughts concerning the issues raised by the *Trustee Essential*. Most of the *Trustee Essentials* include discussion questions. Perhaps a board member (especially one with experience on the topic to be covered) or the library director or a library system staff person could volunteer in advance to lead the discussion.

The DLTCL is producing Trustee Training Modules that can also be used to guide trustee continuing education sessions at regular or special board meetings. These modules are available in PowerPoint and web versions at <http://dpi.wi.gov/pld/trustee.html>. These modules are designed to be used for continuing education sessions led by a knowledgeable trustee or librarian.

Keep in mind that your library system offers professional consulting services to member library staff and member library 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 system consultant or other expert to lead a continuing education session at a regular or special board meeting.

Active involvement in an organization like the Wisconsin Library Trustees Association (WLTA) and/or the Association of Library Trustees and Advocates (ALTA) is another excellent way to keep up to date on library issues and share ideas with fellow trustees.

Web sites

The DLTCCL maintains a Wisconsin Library Trustee Resource Page at <http://dpi.wi.gov/pld/trustee.html>. This web page features the Trustee Training Modules discussed above, as well as many other resources to support the activities of library trustees. Many library system web sites also have important information for library trustees.

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 system workshops and send at least one trustee per year to the annual WAPL and/or WLA conferences. Funding should also be provided for at least one trustee's membership in WLTA (and WLA).

Discussion Questions:

1. What issues do you want to learn more about? Where can you turn to learn more about those issues?
2. Should the Wisconsin Library Trustee Association look into voluntary certification for library trustees? If so, what should be required to earn certification?

Sources of Additional Information:

Attached Sample Trustee Orientation Outline

Your regional library system staff (see *Trustee Tool B: Library System Map and Contact Information*)

Division for Libraries, Technology, and Community Learning staff (see *Trustee Tool C* for contact information)

Wisconsin Library Trustee Resource Page at <http://dpi.wi.gov/pld/trustee.html>

Wisconsin Library Trustee Association (WLTA) (at <http://www.wla.lib.wi.us/wlta>)

Association of Library Trustees and Advocates (ALTA) (at <http://www.ala.org/alta>)

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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
 - 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
 - Wisconsin Statutes Chapter 43 (Wisconsin's library law)
 - a copy of the *Wisconsin Public Library Standards*
 - a copy of a brochure or other concise information about your library system
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 *Trustee Essential #2: Who Runs the Library?*)
 - board bylaws, organization, officers, and committees (review *Trustee Essential #3: Bylaws—Organizing the Board for Effective Action*)
 - location, schedule, and conduct of meetings (review *Trustee Essential #4: Effective Board Meetings and Trustee Participation*)
 - responsibilities and expectations of board members (review *Trustee Essential #1: The Trustee Job Description*)
 - library long-range plans, and the status of activities to meet the objectives of those plans
 - recent library accomplishments
 - board relationship to the library director, the library staff, and the municipality (review *Trustee Essential #2: Who Runs the Library?*)

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