

Tales from a New Trustee

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Orientation – A New Trustee Needs Help

OK – now you’re a library Trustee. Maybe you’ve even participated in your first meeting or two, but do you really know what you’ve gotten yourself into? No matter how much you talked with other board members or how many meetings you attended before you got on the library board, you may not have a clue!

It’s time to get some help. A good orientation process is very helpful to a new Trustee. It provides the foundation to understand the responsibilities you have taken on. What does a good orientation include? It will vary in every situation, given the differences in library directors, libraries, and Trustees, but there are some basics that I think are very useful.

Many of us will sit down with the library director for our orientation. In some cases, the orientation might be done by or with the board president. This session should probably last one to two hours, possibly longer. There’s a lot to absorb. You’ll probably get some information verbally, but most of it will be in piles of paper for you to read later.

In my opinion, there are eight key components of a good orientation:

1. Get to know each other. You and the library director should exchange information about your backgrounds. Share why you are interested in the library. Give the director the information needed for library records, to create a name tag and/or business cards, and to update the library Web site. Get comfortable with each other.

2. Get some history about the library, if you don’t already know it. What are the traditions of the library? How long has it been in existence? When was the last new building or remodel done? What is the library’s reputation?

3. Get copies of key library documents. The pile will be bigger than you think. Most of this you can read later, or simply use for reference, but ask the director for things you need to know. Important documents may include:

   - Board bylaws. This is the guiding document for the governance of your board and your library.
   - A current copy of the library’s strategic plan.
   - Library policy manual. A key job for Trustees is developing and approving the policies that are used to run the library, from financial procedures and policies to the development of collection standards. You need access to the current policies and the library employee handbook. While the board is directly concerned with only one employee – the director – it is important to have access to the rules for the rest of the staff.
   - A current copy of the library’s budget and tax documents. As a financial overseer, you need to understand how the library gets its funding and how it spends the money entrusted to it to serve the community. While the process may vary depending on the type of library you have, know your financial situation.
   - An organization chart for the library staff. This will give you some understanding of the structure of the staff and who the key managers are. You don’t need the names of every employee, however. Most of all, remember that you are not their boss.
   - Meeting notice rules. Most states have some form of the Open Meeting Act, a state law that governs the conduct of public body meetings. Get a copy of the rules! Cover this in detail so that you know when you can engage in a discussion of library business and when you cannot. Most board discussions have to take place in public, with meeting notices and agendas posted ahead of time. There can be penalties for not following the rules.
   - Trustee handbooks. Your state library or your state library association may publish information pertinent to library Trustees, such as Illinois’ “Serving Our Public” standards guidelines and the Illinois Trustee Facts File. ALTAFF will soon be publishing The Complete Library Trustee Handbook by ALTAFF Executive Director Sally Gardner Reed [editor’s note: for details, see page 3]. Ask about any such resources that the library gives to new Trustees or that it has in the reference department.

4. Ask about communication to and from the director to the board, and from individual Trustees to the director and to other Trustees. Your state’s laws may restrict certain communications. Engage in the discussion with your director about what you may or may not say in conversations with staff members, so that the staff does not perceive you as “micro managing” the library. Remember that perception counts, even if you do not intend something you say as an order. This often trips up new Trustees, including me. Find out your local rules about talking to the press; board policy may limit that to the director and the board president.

5. Have a discussion about the way the library works. What are the hours? Is there a bookmobile? Are there branch locations? What is the role of the major departments of the library? I know I didn’t begin to comprehend the role of techni-
Tools for Trustees

The goal of the Office of Intellectual Freedom is to educate librarians and the general public about the nature and importance of intellectual freedom in libraries. For more information, visit www.ala.org/oif.

OIF and ALTAFF present
Webinars on intellectual freedom for Trustees

The American Library Association Office for Intellectual Freedom (OIF) and ALTAFF will present three Webinars in February for library Trustees on the topic of controversial materials in library collections.

The Webinars, titled “Controversial Materials in the Library: Supporting Intellectual Freedom in Your Community,” are intended to help Trustees understand the basics of intellectual freedom in libraries. They will cover information on collection development policies, procedures for handling challenges to library materials, and tips on responding to controversies that may arise. Angela Maycock, OIF assistant director, will lead the Webinars.

“Trustees are often called on to create and implement library policies and to explain the policies in their communities,” said ALTAFF Executive Director Sally Gardner Reed. “We’re pleased to be working with the Office for Intellectual Freedom to enhance Trustees’ understanding of intellectual freedom principles and how to apply them in libraries.”

The Webinars will be offered Feb. 17, 4 p.m. EST, Feb. 23, 2 p.m. EST, and Feb. 26, noon EST. Each session will include the same content and will be 60 minutes in length. Registration is limited to 60 participants per session. The cost is $39 for ALTAFF members and affiliates, $49 for individuals, and $95 for a group of two or more attendees at the same location. To register for “Controversial Materials in the Library: Supporting Intellectual Freedom in Your Community,” visit www.ala.org/oif/onlinetrainings or www.ala.org/altaff, or call ALA Customer Service at (800) 545-2433, ext. 5.

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