

# Changing “Newbies” to “Knowbies”

Creating an Orientation Toolkit  
For New Trustees

Presented by Laura Ross-Giroux  
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# According to Webster to orient is...

to adjust someone or something to the surroundings or situation,  
to turn or guide in a specific direction.



Who does the orientation?

When to do the orientation?

Where does the orientation take place?

What information to include?



# When does the orientation take place?

- ▶ As soon as the municipality notifies the library of a new appointment, a phone call should be made to the new board member and a date should be made for the orientation.
- ▶ Prior to the next board meeting, if possible.

# Who does the orientation?

- ▶ Ideally, the chair of the board does the orientation, perhaps in conjunction with the library manager or another board member.

# What to include????




# What is a trustee?

“A trustee is a person to whom property is legally committed in trust. A library trustee's commitment is to both the physical property and resources of the library and to the services it provides. The library board has the final responsibility to see that its library provides the best possible service to its community.”\*

▶ \* Mid-Hudson Library System




- ▶ Roles and responsibilities
  - ▶ Ethics statement
  - ▶ Golden Rules for trustees
- 

- ▶ A brief history of your library
- ▶ Mission statement
- ▶ Vision statement



# The Library Board

- ▶ Who are the members of the library board
  - ▶ Why they are there
  - ▶ Contact information
  - ▶ When their terms are up
- 

# Board committees

- ▶ Names of the committees
- ▶ Who is on them
- ▶ Their mandate

MARKETING

BUILDING

FINANCE

FUNDRAISING

PERSONNEL

# Board meetings

- ▶ When does your board meet and where
- ▶ Are there special board meetings?
- ▶ Any other board occasions



# Library Employees

- Names of the current staff
- Job descriptions




# Library Services

- ▶ Hours of operation
- ▶ Services provided
- ▶ Brochures
- ▶ Library map

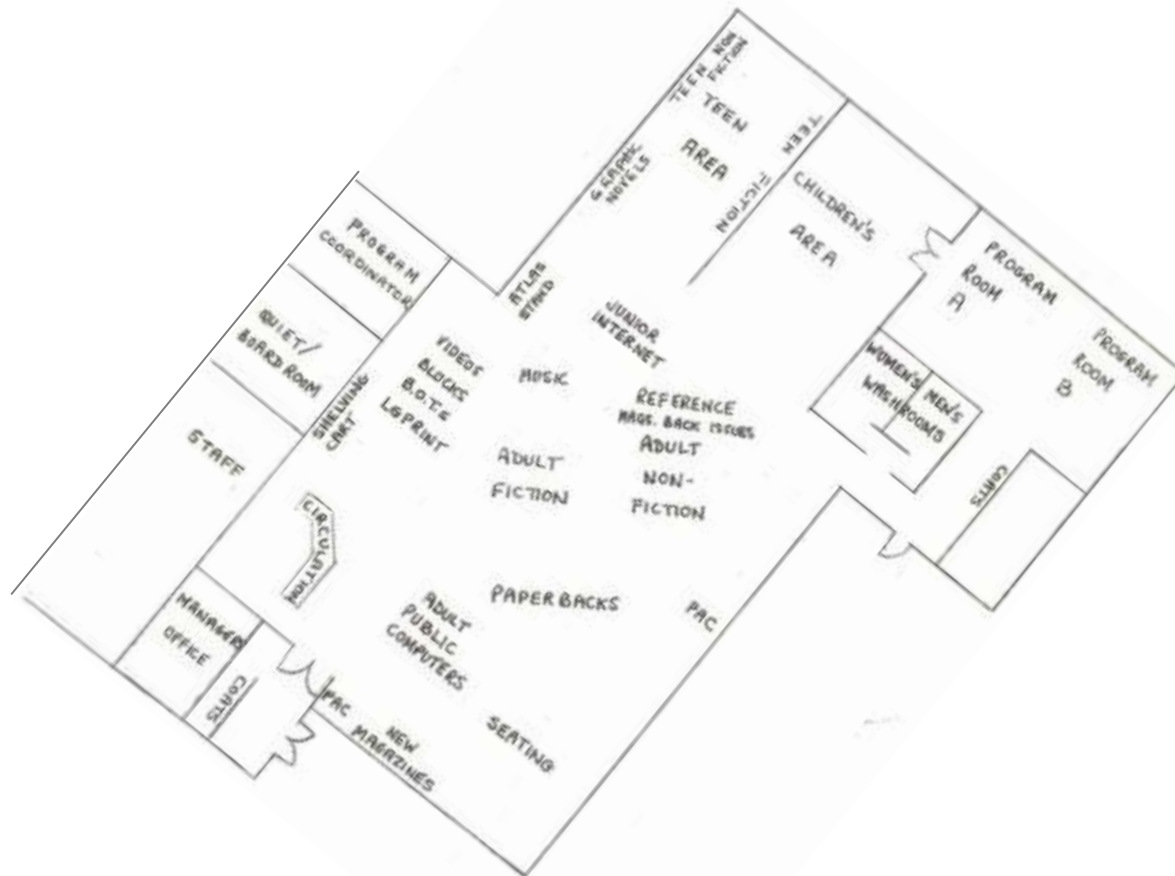


# Online Presence

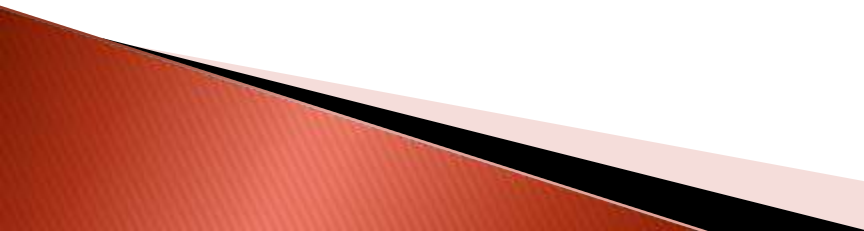
- ▶ Website
  - ▶ Facebook
  - ▶ Twitter
  - ▶ MySpace
  - ▶ Instagram
  - ▶ Other social media
- 



# Taber Public Library



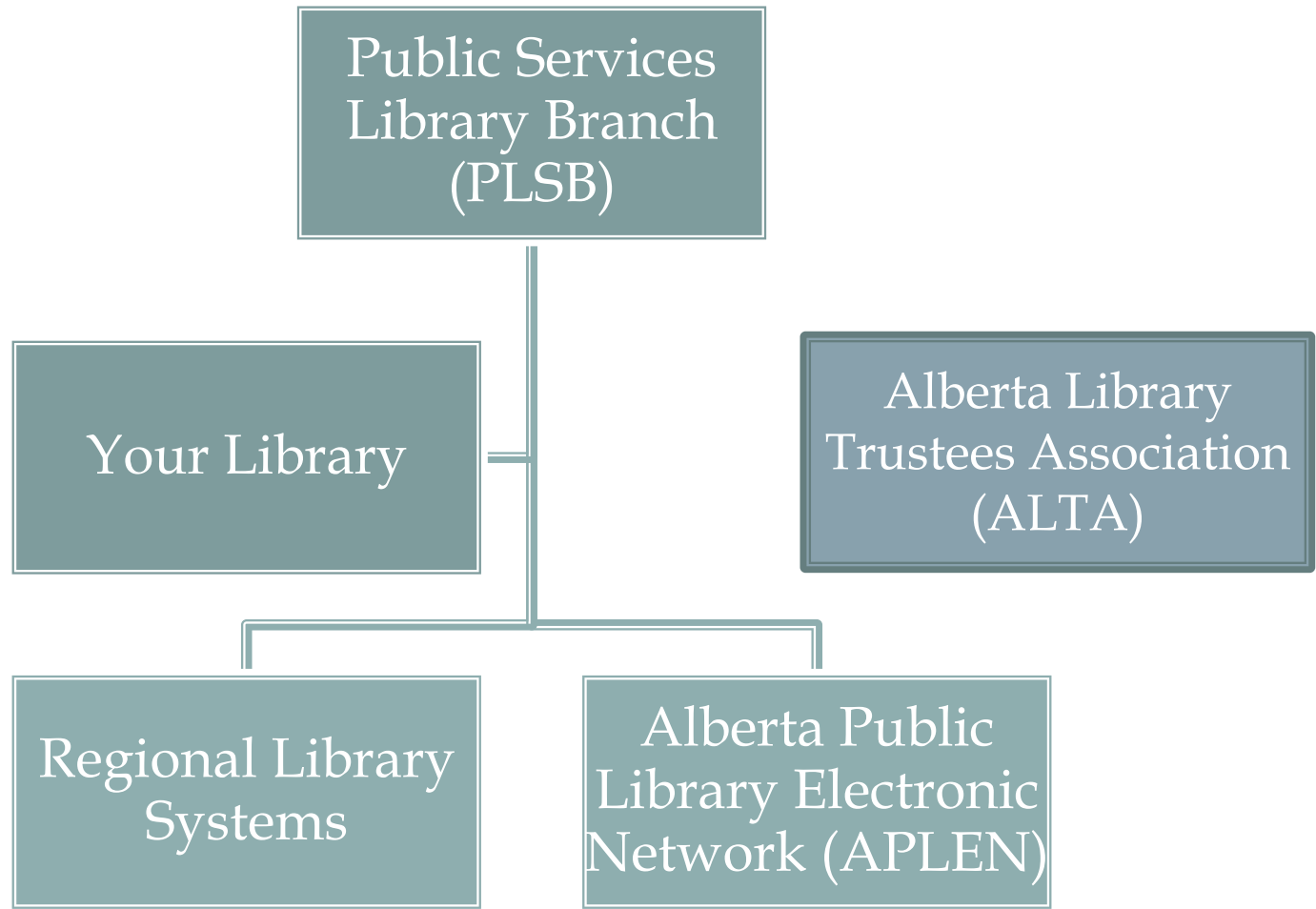
# Friends of the Library

- ▶ FOL are a separate entity from your library
  - ▶ They are a independent society at “arms length”
  - ▶ They are fundraisers and advocates
  - ▶ Can hold raffles and casinos that libraries, as non-profits, cannot do
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# Lines of Authority



# Library Relationships



# Fiduciary Responsibilities

- ▶ How the library is funded
- ▶ Budget for the current year and/or
- ▶ Last financial statement



# Plan of Service


- ▶ A brief outline of your service points and goals



# Statistics

- ▶ Numbers of visits, website usage, breakdown of memberships, program attendance, etc.



- Some of the material will be permanent .
  - Regularly updated.
  - Keeping a list of orientation materials ensures that all trustees will receive consistent information.
- 



# Follow up....

- ▶ The 5" thick board manual.
- ▶ Library tour and staff introduction.



# More follow up....

- ▶ There are three more steps to orientation:
  - Integration
  - Support
  - Evaluation

Questions?????

# Resources:

- ▶ Taber Public Library
- ▶ Chinook Arch Regional Library System
- ▶ Southern Ontario Library Service
- ▶ Arkansas State Library
- ▶ Keokuk Public Library
- ▶ Mid-Hudson Library System
- ▶ Kentucky Department for Libraries and Archives

## ▶ Contact information:

Laura Ross-Giroux

[President@librarytrustees.ab.ca](mailto:President@librarytrustees.ab.ca)