

Wise Practices: Trustee Orientation Checklist

This resource for your orientation of new trustees assumes that your public library has the wise practice of the board chair and the library director sharing the responsibility and leadership for trustee orientation. Together, you strive to create an ideal orientation that includes, but is not limited to, what has been provided in this resource. The checklist provided in this resource is a template with suggestions; please use, improve and make this your own.

As you review and develop your trustee orientation consider the following:

- What is the role of the board chair in orientation?
- What is the role of the library director in orientation?
- What are the expectations of current and experienced board members?
- Should one of the more experienced trustees be a mentor for a new trustee? If so, what are the expectations?
- What was learned from the most recent board assessment about the orientation process and what could be done differently?
- How does the orientation fit with the board development plan? What needs to be different with orientation or with the board development plan?

Wise Practices resources from ABCPLD and BCLTA are works-in-progress and the content, usability, and applicability will be updated with input from library directors, trustees, federations, and the Public Libraries Branch.

BCLTA trustee orientation support resources include:

- [BC Public Library Governance: A Quick Guide for Library Trustees](#)
- [Governance Workshops and Workbook](#)

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Your Public Library

Item	Notes <i>For example, people involved, goals, timelines, resources, outcomes ...</i>	Status
Library tour		
Organizational chart		
Staff members, particularly those who interact with the board		
Services and programs		

Your Board

Item	Notes	Status
Board members		
Board mentor		
Board policy manual		
Recent and relevant board minutes		
Strategic plans		

Board calendar		
Board roles and responsibilities		
Board process or rules of order (in other words what to expect as the board conducts meeting business)		
New trustee self-evaluation; focusing on local knowledge, relationships, and skills that are being brought to the board, and personal expectations for board experience (what do you as a trustee want from this experience?)		
Board assessment and development plan		
Code of conduct / team charter		
Committees		
Board culture		

<p><i>For example,</i> how the board functions and how the governance team (board and library director) work together, such as level of formality, communications, and other areas of implicit knowledge and practices.</p>		
<p>Board service agreements</p>		
<p>Specific issues and recent work regarding employer responsibilities</p> <p><i>For example,</i> current board HR policies for OH&S</p>		
<p>Specific issues and recent work regarding board financial oversight and legal obligations</p> <p><i>For example,</i> recent financial reports, recent SOFI, fund development plans, capital campaigns, legal agreements and actions, and explanation of</p>		

<i>any board fees, debt and mortgages.</i>		
Issues before the board for consideration or advisement		

Your Local Community

Item	Notes	Status
Local government		
Local First Nation(s)		
Local elected officials		
Key partners		
Official Community Plan		

Advocacy and Community Engagement

Item	Notes	Status
Advocacy and community engagement plans		

Key messages locally and provincially		
Trustee role in telling the library's story and being a champion of the library		
Attending community and library events		
<p>Expectations for representing the library</p> <p><i>For example, how the board manages media requests public presentations, and official board communications.</i></p>		

Your Public Library Community

Item	Notes	Status
Current public library trends and issues		

Associations, federations and the BC Libraries Cooperative		
Map of BC public libraries		
Enduring public library values such as privacy, equity, access, and intellectual freedom		
Significant public library discussions such as reconciliation (decolonization, Indigenization and Indigenous resurgence), diversity, inclusion, anti-racism, community resiliency, and social infrastructure		
Types of other libraries in BC		
Ministry website for mandate and role and responsibilities of the Public Libraries Branch		

<p>Review the public library's relationship with the Public Libraries Branch, funding and reports (including SOFI) and the administration of the <i>Library Act</i></p>		
<p>The legislative and regulatory framework: Starting with the <i>Library Act</i> and including an overview of regulations that are applicable to oversight and the board's role as employer</p>		
<p>Connect with BCLTA to find out more about BCLTA work and resources for BC public governance and to subscribe the monthly <i>Bulletin</i></p>		