



New Library Board Member Orientation



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New Library Board Member Orientation

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Purpose and design of this framework

Helping new board members succeed is a joint responsibility of the board chair and library director. This template can be used by local libraries to create a packet and orientation process for new board members.

It is impossible to process everything there is to know about the library in one meeting. The best onboarding educates new board members as items arise. There are some basic things that board members will find useful on their “first day.” This framework tries to address those needs.

Consider giving background information when major agenda items arise during board meetings. This will be helpful for all board members.

MSL Consulting Support

Please [reach out to your MSL Consultant](#) for additional information and guidance.



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What do board members need to know at the beginning of their tenure

- Who else is on the board?
- Who works at the library?
- When do board meetings normally happen, and what should the board member expect?
- What is expected of the board member?
- What is happening at the library right now? What services does the library offer? Who uses the library? What positive things are happening? What challenges is the library facing right now?
- What is the board currently working on during their meetings?

How do we best relay that information to new board members

- Schedule a tour of the library or a meeting with the library director.
- Schedule a meeting between the board chair and new board member.
- Give the new board member a packet that includes information about the library, local government, the Montana State Library, the library federation, and support resources.
- Before each major action item on a board meeting agenda, give a brief background on the item and what board members need to know to make wise decisions.

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Ideas for the library tour/meeting with the library director

- Identify what you want the board member to see. Are there areas of the library you are particularly proud of? Are there maintenance or repair needs the board member will need to be aware of? Be prepared to spend a little time in those areas.
- If there are staff or volunteers present during the meeting or tour, introduce them to the new board member and briefly discuss how many staff and/or volunteers work at the library.
- Help new board members develop a basic understanding of the library. Share the answers to the following questions during the meeting/tour.
 - Who uses the library? What are the most popular services? Who doesn't use the library, and why do you think that might be the case?
 - How is the relationship between the library and the local governing body? Who do you work with the most in the city or county? If you are a district library, explain how that is different from a city or county library.
 - How can library board members help the library be successful? What do you personally find valuable? Is it the conversation and brainstorming? Is it board members who can and will talk about the library and its services?
 - What is going well at the library? What is challenging?
 - What is the board working on right now? Is it budget season? Are you creating a new plan for the library? Are you reviewing policies? Identify what the board is doing and share some background information about that area.
- Briefly talk about the connection between the library and
 - local government
 - The Montana State Library
 - The library Federation

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Ideas for the meeting with the board chair

- Welcome the new board member. Share the board packet with them. Let them know they should contact you or the director if they have questions.
- Discuss the board meetings
 - When do board meetings normally happen?
 - How do board meetings usually work? This is a good place to talk about [open meeting laws](#), parliamentary procedure, and the culture of the board. Some boards are very relaxed and free flowing. Others have a more formal culture. What is your board like?
- Discuss what the new board member can do to be successful
 - Read the meeting materials before the meeting, ask questions during agenda items, and share ideas.
 - Review [short trustee videos from the State Library](#) or [read some of the resources available for library board members](#).
 - Note: This is a good time to talk about the requirement for a majority of the board to receive at least 3 hours of continuing education. Discuss how you normally handle this requirement.
 - If the board member seems interested, let them know about the [voluntary trustee certification track](#) available through the Montana State Library.
 - Consider using a library sponsored email address as any exchanges about the library are public record and can be part of a public records' request. If the new board member uses a library sponsored email address for all library correspondence, those emails will be provided during a public records' request.
 - Using a personal email for library correspondence puts the board member at risk of all their personal email being searched during a public records' request.
- Discuss what the board is currently working on and any background information the board member might find helpful.
 - For example - if the library is working on its budget share information about how big the budget is, how the process has worked in the past, and [links to recorded videos and resources](#) about budget and finance in the library.

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What should be included in the packet given to the new board member?

Library information

- List of board members and the director with contact information for each person.
- Board bylaws
- Minutes from previous meetings
- Copies of important library documents such as
 - Legal documents which may include resolutions, interlocal agreements, or other contracts
 - Written plan for the library
 - Job description for the board member
 - Library policies
 - Budget and financial reports for the current fiscal year

Name	Contact Information
Library Director	
Board Chair	

Other partners

- [1-page document about the Montana State Library](#) and its services
- [1-page document about library federations](#)
- [Public library standards](#)
- Any information about local government or other key partners that might help the board member in future decisions

