

Trustee Video Training Agenda



In order to complete the 3-hour board training requirement, consider scheduling 3 1-hour learning sessions.

- Adopt the plan during the May or June board meeting.
- Post public notice of the training sessions as you would for any work session where no action will be taken.
- Acknowledge completion of the training in a board meeting and include that in the minutes.

For each 1-hour session

1. Director or Board chair can facilitate discussion.
2. Review each of the resources on a screen or print a copy for each trustee.
3. Watch each video as a whole group
 - a. Write down any questions or comments as you watch
4. Use the Discussion Questions to have a short reflection after each video or after all videos have been viewed
 - a. Refer to your notes to add to the discussion

Training 1 – Role and Responsibilities

- [Public Library Trustee Orientation Overview](#) (8:15)
- [Role of the Board Chair](#) (7:35)
- [Library Law Resources](#) (5:07)
- [Tips for Effective Meetings](#) (10:42)
- [Strategic Planning: An Overview for Public Library Trustees](#) (9:03)

Resources to Review

- [Trustee Handbook, Volume 1](#)
- [Strategic Planning Handbook](#)
- [Board Meeting Resources](#)

Discussion Questions

- What information was a review?
- What information was new or surprising?
- How can you apply this information to how you do your job as a trustee?
- What will you change as a result of learning this information?

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Training 2 – Budget

- [Budgeting Responsibilities for Public Library Trustees](#) (3:51)
- [Local Funding Sources for Public Libraries](#) (4:33)
- [State Funding Sources for Public Libraries](#) (7:06)
- [Trustee Essentials: Reading Financial Reports](#) (5:36)
- [Mill Levies and Your Library](#) (9:13)

Resources to Review

- [Budget and Finances Webpage](#)
- [Financial Management Best Practices Information Guide](#)
- [Guidelines for Mill Levy Elections Information Guide](#)

Discussion Questions

- What information was a review?
- What information was new or surprising?
- How can you apply this information to how you do your job as a trustee?
- What will you change as a result of learning this information?

Training 3 – Connections and Planning

- [The Montana Library Scene](#) (7:48)
- [Understanding Montana's Library Federations](#) (19:27)
- [Community Partners: Friends of the Library and Library Foundations](#) (4:49)

Resources to Review

- [Federation Notebook](#)
- [Montana Library Association Webpage](#)

Discussion Questions

- What information was a review?
- What information was new or surprising?
- How can you apply this information to how you do your job as a trustee?
- What will you change as a result of learning this information?