

# Trustee Training

Chapter 1

## What is a trustee?

- Participate as a member of a team (the library board) to protect and advance the interests of the broader community by effectively governing the operations and promoting the development of the local public library.

## Principle Activities

1. Prepare for and attend regular board meetings.

*While you and your fellow trustees are busy people, it is important that the full board meet on a monthly basis to conduct business. You can contribute to the library by encouraging regular meetings and assuring that the meetings are properly noticed in accordance with Wisconsin's open meetings law.*

## Principle Activities

2. Work with the municipal governing body to obtain adequate library funding. Assist in the review and approval of the annual budget and monthly expenditures as presented by the library director.

*As a trustee, your focus should be on those services and what is required to provide them to the public in the most beneficial manner. Trustees should attend the governing body meetings when budget requests are presented so that they can answer questions about need and account for how previous appropriations benefited the citizens and the community. By law, only the library board has the authority to approve expenditures made by the library.*

## Principle Activities

3. Participate in the development and approval of library policies. Review policies on a regular, systematic schedule.

*Each trustee acts as a contact with other members of the community and has the chance to hear about concerns or desires relating to the library. The comments you receive from the public can help you and the other members of the board address the community standards through thoughtful and fair policies. It can be helpful for the board to establish a routine procedure for reviewing policies to be sure that they remain current.*

## Principle Activities

4. Help determine and advocate for reasonable staff salaries and benefits.

*By providing The Trustee Job Description TE1-3 adequate compensation for staff, the library board will help local officials and the public generally to understand the importance of the library and the complexity of the tasks involved with providing good library services.*

## Principle Activities

5. Assist in the hiring, supervising, and evaluating of the library director.

*If this is required, deciding how the process is conducted and who is finally selected will be among the most important decisions a library board will ever make. A library director can be around for many years and have a significant impact on the tone and quality of library service.*

*Finally, in order to assure that you do not have to go through this process unnecessarily, the library board needs to establish a regular procedure and schedule for assessing the performance of the director and providing suggestions for improvements.*

## Principle Activities

6. Study the needs and interests of the community and see that they are addressed, as appropriate, by the library.

*As a community liaison, you are in a unique position to survey the community, learn of its needs and wants, and include those interests in discussions relating to library development.*

## Principle Activities

7. Act as an advocate for the library through contacts with civic groups and public officials.

*It has been written that the core of effective politics is the building of rapport. Since local politics are personal, your contacts on behalf of the library with public officials from the municipality, the county, and the state will advance the cause of your institution.*

## Principle Activities

8. Become familiar with principles and issues relating to intellectual freedom and equitable provision of public library services.

*It is a responsibility of your library board, and each member of that board, to make a commitment to the community's freedom of inquiry and expression, and to be prepared to address calmly and respectfully the challenges that may come before you.*

## Principle Activities

9. Assist in the formulation and adoption of a strategic plan for the library. Periodically review and revise strategic plan.

*Trustees, as the citizen representatives with detailed information about how the library functions, are in an ideal position to assist with planning. Your important role in planning will be to investigate, along with the library director, different planning options and then decide on the most appropriate process for your library.*

## Principle Activities

10. Attend Wisconsin Library Association conferences, regional The Trustee Job Description TE1-5 system workshops, and other training opportunities in order to expand knowledge of effective leadership, and consider membership in the Wisconsin Library Trustees and Friends (WLTF).

*One way to maintain energy and enthusiasm, as well as to increase understanding of trusteeship, is to participate in the various opportunities for education that are available to trustees.*

## Analysis of Activities

- What activities are trustees good at already?
- What activities could be improved upon?