

Saskatchewan Public Library Governance

ORIENTATION MODULE

Orientation

This document is provided as a guideline to help library administration and board chairpersons prepare an orientation for new board members.

When should the orientation take place?

Orientation should be provided to a new board member prior to his/her attendance at the first meeting. Parts of the orientation could take place annually for the entire board.

Why is board orientation important?

Board orientation is a critical first step to help new board members learn about this new position. Following the orientation module, the board member should be able to answer the following questions:

- ▶ What information is contained in the board's annual report?
- ▶ What is the board's financial situation?
- ▶ What opportunities are available for committee work with this board?
- ▶ What are the strengths I can bring to this board?
- ▶ What is expected of me?
- ▶ What is the organizational structure of the Library and the provincial public library system?
- ▶ What is SILS?
- ▶ How will I communicate and participate in the work of the board?
- ▶ How do the staff and the board work together?

New board members need to feel like they're an integral part of the board as soon as possible. If they don't feel comfortable voicing their opinions, the board is losing valuable input! Information is what will help everybody feel at ease.



What is the purpose of an orientation?

An orientation should provide important information about the library and about the board's roles and responsibilities. An orientation sets the standard for conduct and achievement required from board members. A successful orientation will help a new board member understand the roles and responsibilities of the library board and feel prepared to actively participate in meetings.

What could be included in an orientation?

- ▶ Ask new board members to present themselves and their interests – what they hope to offer the board and what they hope to gain as board members.
- ▶ Provide some of the history and evolution of the organization and review planning documents.
- ▶ Discuss issues and challenges facing the organization as well as any key trends that could impact the organization.
- ▶ Provide board members with information on organizational policies and procedures.
- ▶ Outline roles and responsibilities of staff and contrast those with the roles and responsibilities of the board. This is an opportunity to address the potentially difficult issues surrounding overlapping or unclear lines of responsibility.
- ▶ Consider assigning a mentor - a senior member of the board is assigned to tutor a new member in the operations of the board.
- ▶ Plan a visit and tour of any of the organization's offices and facilities, ideally led by library administration or an experienced board member.
- ▶ Discuss options for committee involvement. There should be a solid match between the interests, skills and preferences of the individual board member and the requirements and challenges of the committee they join.
- ▶ Provide a preliminary review of financial documents.
- ▶ Review the Public Library Act and Regulations.

Additional tools to use when preparing an orientation:

- ▶ Appendix A: Board Orientation Checklist
- ▶ Appendix B: How Libraries are Financed
- ▶ Appendix C: Brief History and Current Context for Saskatchewan's Public Libraries

Who should be responsible for the orientation?

The board chairperson with the assistance of library administration should be responsible.

What could be included in an orientation information kit?

- ▶ Cover letter welcoming the new board member
- ▶ Saskatchewan Public Library Governance...In a Nutshell
- ▶ An organizational chart
- ▶ List of board members and their contact information and terms of office
- ▶ A description of programs and services
- ▶ A description of the board's role
- ▶ Board members and a list of committees
- ▶ Copies of all current library policies
- ▶ A quick description on meeting procedures
- ▶ Budget documents (current budget, most recent audited financial statements)
- ▶ Annual report
- ▶ Strategic plan
- ▶ Recent board minutes and monthly financial statements
- ▶ Brochures and promotional materials
- ▶ How Libraries are Financed? (Appendix B)
- ▶ Brief History and Current Context for Saskatchewan Public Libraries (Appendix C)