

Library Orientation and Training Checklist for New Library Directors

This is a suggested list of meetings and tasks to help orient a new library director. It should be adapted for local needs and schedules. Some meetings can be done by one or two trustees rather than the entire board.

In the First Week the Library Board Should:

- Introduce the new director to library staff and trustees
- Introduce the new director to key municipal elected and appointed officials
- Give the new director a tour of the library building
 - Note areas that work well or have been recently updated
 - Note areas of concern or that may need major outlay in the near future
- Review conditions of employment with the new director
 - Hours of work
 - Benefits
- Review job description with the new director
- Discuss any particular issues, concerns, or problems that the new director may have to deal with or that the board may want emphasized.

In the First Month the Director, Assisted by Trustees, should:

- Become familiar with library policies
- Become familiar with the library's mission statement, long-range or strategic plan, and other documents guiding the library's public service philosophy
- Learn library budget and financial procedures
- Review library board meeting procedures
- Review with the board their expectations and evaluation criteria for the director
- Meet key members of Friends of the Library and Library Foundation
- Meet key members of the community

In the First Three Months the director should:

- Review legal issues affecting libraries
 - Open meetings law
 - Public records law
 - Americans with Disabilities Act (ADA)
 - Library confidentiality laws
 - Ethics and conflict interest laws
 - Copyright laws
- Review *Administrative Essentials: A Handbook for Wisconsin Public Library Directors*

In the First Six Months the director should:

- Review library system membership requirements
- Review requirements and expectations related to shared automation system membership
- Enroll in online library administration/management class, if needed for certification
- Review *Trustee Essentials: A Handbook for Wisconsin Public Library Trustees*

In the First Year the director should:

- Attend Wisconsin Library Association (WLA) or Wisconsin Association of Public Libraries WAPL) conference