

**United
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Association of Library Trustees,
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Short Takes for Trustees

Evaluating the Library Director

Resource Guide

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November 2014

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Evaluating the Library Director

Ideally, what is outlined in a performance review should not come as a surprise to anyone involved. This is because the board or its executive committee should have had a discussion at the beginning of each year to set goals for achievement and professional growth with the director. These should be goals that are negotiated with the expected outcomes that clearly state how this will help move the library forward in fulfilling its mission. If you've completed a strategic plan, the goals should be linked to the plan.

By linking evaluation to goal completion, the board can be assured that the director and the board are heading in the same direction and have identified the same priorities. In addition, this link keeps the evaluation as objective as any evaluation can ever be and, therefore, it should be an honest assessment that leads to the groundwork of setting the next year's goals. By negotiating goals for achievement ahead of time, the director and the board know what is expected thereby avoiding any "gotchas" in the process.

Whatever method you use for evaluating performance, it is critical to do so in writing. The director deserves a written evaluation and a copy should also be placed in his or her personnel file.

When determining, with the director, what performance goals to focus on for the coming year, a good place to start is with the director's job and the most recent strategic plan. While the board oversees and often initiates the planning process, the director is ultimately responsible for its implementation. Therefore, this is a good document by which to assess where the library is currently and where it needs to go to meet the goals of the plan.

Though not necessarily a comprehensive list of focus areas, generally the library director should be evaluated on:

- Staff relationships and management. If a staff suffers from low morale or a lack of leadership, service delivery will suffer. It's important to assess whether a director is interacting in a positive way with staff. This can be a tricky area for assessment. On the one hand, you do not want to have staff members coming to you to report on negative aspects of a director's performance. This is an area ripe for a disgruntled employee to exact revenge and is a highly dysfunctional course of action. There should, instead, be a written grievance policy and all employees should be compelled to follow it if they have concerns. If you've had several grievances, this should be of concern and should be discussed with the director as soon as they come in to try to ascertain the legitimacy of the complaints.

Many boards struggle with the idea of having the staff evaluate the director. This can help to identify problems if you suspect they are there. In a library where staff is doing excellent work and there are no signs of low morale, however, staff evaluations of the director can end up causing problems where there were none. Again, these evaluations – often done with the promise of anonymity – are perfect tools for gripes of all stripes, whether legitimate or not, and create a situation where the director is, in a way, accountable to staff rather than the other way around.

It may be that the best way to evaluate this is for board members to look at the overall accomplishments of the director and the staff. If these are high, there is probably a high

degree of mutual respect and cooperation in place. It also helps to talk to the director about the various teams that are in place, what their goals are, and what they've accomplished. Certainly, trustees who visit and use the library should be able to see whether the quality of service is consistently high and friendly – if not, this could be another sign of trouble.

- Library goals as stated in the strategic plan. Are efforts ongoing? Is the entire staff engaged? What outcomes are evident from the work of the staff and director that show achievement and continuous improvement? What specific goals have been accomplished and which ones will need added focus in the coming year?
- Financial responsibility and oversight. Is the budget on target? Is the money well spent during the course of the year and in the “black”? Do the programs supported by the budget reflect the priorities set by the board and the strategic plan?

What about financial development? Does the library director work well with the Friends group and foundation? Have there been efforts to reduce the costs of outside services to the library in order to maximize the collection and programs budgets? Have grants been written? Have partnerships been created with civic organizations to help fund special literacy projects?

- Overall quality of library services. How innovative are your library services? Do you get feedback from the public about the quality and scope of the collection? Are your services highly used? What kind of media attention do library services get? Do the services delivered meet or attempt to meet the goal of reaching everyone in the community? How does the director determine the effectiveness of service design and delivery and in what ways does he or she make changes to continuously improve services?
- Community Relations Is the library director identifiable as a leader in the community? Does he or she participate in task forces and committees within the community? Is the library regularly highlighted in the media? Does the director have the respect of community government leaders? Does the director foster a library volunteer program? Is he or she a high-profile library promoter?
- Facilities Management. Does the director ensure that the library is always clean, safe and well maintained? If the budget is lacking for maintenance upkeep, what has the director done to try to address this issue? Are marketing and merchandising techniques used to highlight the library's collections and services? Is there good signage within the library to help patrons access various areas of service? Are signs directing community members to the library facility clear and visible? Is the exterior of the library inviting?

Board Relationships. How well is the director communicating with the board? Is the board kept up-to-date on all pertinent issues? Does the director take time to discuss national and statewide trends that may have an impact on local services? Do board packets contain meaningful information that helps members conduct their business, understand trends, set policy?¹

¹ Reed, Sally Gardner, and Jillian Kalonick. *The Complete Library Trustee Handbook*. New York: Neal-Schuman, 2010.

tip sheet #6

Tools for Trustees

EVALUATING THE LIBRARY DIRECTOR

One of the most important roles the Board of Trustees has is to hire the very best library director possible, and then work with him or her to ensure that goals for service are consistently and exceptionally well met. This means that evaluation of the director is critical. Without a formal evaluation process, there is no concrete way for the director to know if he or she is meeting or exceeding expectations. Similarly, without the formal evaluation process, the board may be letting troublesome issues become worse, and the board also loses an important opportunity to put their appreciation of performance in writing.

At the beginning of each fiscal year, the board and director should set goals for performance and areas for evaluation. The performance goals should be achievable and should be determined in consultation with the director.

Areas to be addressed in setting goals should include:

- Staff relationships and management.
- Board relationship.
- Accomplishment of objectives set forth in the library's strategic plan.
- Financial responsibility and oversight.
- Overall quality of library services.
- Community relations.
- Facilities management.

Within each of these areas, determine how success will be measured. This is important because it will eliminate any hard feelings if the board feels the director has fallen short, but the director feels he or she is right on target. By setting the goals and performance measures at the beginning of the year, you will have inserted objective standards into the process, making the evaluation itself more meaningful and less personal.

The evaluation process at the end of the fiscal year should be a negotiated process. Even if you've agreed that circulation will increase 5%, for example, there should be an opportunity to discuss any unforeseen factors that made meeting this target impossible. Use this opportunity to coach the director in areas that need improvement and to praise the director for successes.

The end of the year evaluation process is the perfect time to set new goals for the coming year based on what's been accomplished, and what goals can make the library even better in the coming year.

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Important Note: While it is sometimes difficult to give constructive criticism, it's important to let the director know during the year if you have any performance concerns. It's not good for the library and not fair to the director if you see areas of concern but wait until the formal evaluation to address them.

In the end, the best thing you can do to ensure that you have a high performing director is to provide constant and constructive feedback on how the library is doing, and to engage in a formal evaluation process at the end of each year.

For more detailed information on director evaluations, see *The Complete Library Trustee Handbook* by Sally Gardner Reed and Jillian Kalonick (Neal-Shuman, 2009). This book is available at a significant discount to all United for Libraries members. For more information, visit http://www.ala.org/united/products_services/publications.

updated 5/13

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Sample Evaluation Forms

United for Libraries has provided a variety of organizational tools on our website at <http://www.ala.org/united/trustees/orgtools> to help your Board of Trustees be more effective. Included are links to four sample evaluation forms:

- Board of Trustees of the Hatfield (Mass.) Public Library Director Evaluation
- Rochester Hills Public Library Board Evaluation of the Library Director
- Mid-Hudson Library Director Evaluation Part I
- Mid-Hudson Library Director Evaluation Part II