

FOR YEARS library boards have asked us how they should evaluate the library director. We have responded by offering links on our web site and tools that we considered adequate, but we have never found a method that is superior. Now, after researching (using the excellent tools available through our HOME**ACCESS** databases), we have synthesized ideas and developed our own model. We think you will find it an effective process for improving the health of your library.

ACROSS THE

BOARD

EVALUATING THE STATE OF THE LIBRARY ■ PART 1: DIRECTOR EVALUATION

WHAT IS BEING EVALUATED? The board–director relationship is not a manager–employee relationship. It is a partnership for the purpose of running a highly important community organization: a public library. Rather than evaluating the director, you need to evaluate the administration of the library. This approach enables the board and the director, as a team, to design steps that will enhance the development of the organization.

THE PROCESS. Areas to be evaluated should provide a comprehensive view of the library’s operations. We have identified five areas, you may come up with others if you have specific local conditions such as a building project:

- Customer Service and Community Relations
- Organizational Growth
- Administration and Human Resource Management
- Financial Management and Legal Compliance
- Board of Trustee relationship

Use a form to assess the state of your library. The form should be based on the five areas above. Structure the form more tightly by adding questions under each area. For example, in the area of *Customer Service and Community Relations*:

Level of patron satisfaction	E S N U
Customer service received by patrons	E S N U
Consistent application of policies that affect the public	E S N U
Comments:	

(E = excellent; S = satisfactory; N = needs improvement; U = unknown)

View our suggested evaluation form that encompasses all five areas on the *Trustee Resources* section of the MHLS web site: <http://midhudson.org/trustee/main.htm>.

Each member of the board should individually respond to the form. In responding to the form, board members could refer to the plan of service, board minutes, usage statistics, program results or other information sources from the year. Once all forms have been submitted, summarize the results. A sample summation form is available on the MHLS site. This will provide the board with a picture of how the organization is functioning and will shape the evaluation process. If the summation shows:

- the organization is functioning well, your evaluation process should focus on motivating and supporting the director.
- everything is basically OK, but some specific things need to be addressed, then clarify the board’s expectations through the evaluation process, and also offer support and motivation.
- the organization is functioning unsatisfactorily, identify the issues, determine what is needed to get the organization on track, and create a timeline for progress reports.

Once the board has developed some agreement on the functioning of the organization, they should meet with the director, either as a full board in executive session, a committee, or one or two board members. The discussion should use the summation as an outline. Take this opportunity to discuss areas of weakness within the organization, then, with the director, develop goals to improve the organization. Also use this opportunity to tell your director if they are doing well in areas, no one likes their successes to go un-

noticed. The summation, with the issues to be addressed written in, should be signed by both the board president and the director.

Some might object that this model does not evaluate the director, but earlier models tend to separate the performance of the organization from the performance of the director. You could conceivably have situations where the library is failing, but the director is receiving a good evaluation. This model ties the responsibility for the performance of the organization to the director.

COMPARISON OF MODELS

TRADITIONAL	MHLS
Focus on Director	Focus on Library
Assumes Hierarchical Manager–Employee Relationship	Assumes Governance–Executive Partnership
Personality Driven	Performance Driven
Focus on what is wrong	Focus on Success
Develops methods for improving Director	Develops methods for improving Library
Corrects past problems	Builds future development

WORST CASE SCENARIO: DISMISSING THE DIRECTOR. Many boards feel the only time they need to evaluate the director is when things are going badly. By then it is too late. The director evaluation should be an annual event and the best and easiest time to begin this schedule is when things are going well.

“Ideally, evaluations are positive, developmental processes that include praise and constructive guidance. The board should review the library plan, job descriptions, goals and objectives and the annual report submitted by the director, documenting accomplishments of the library. Other relevant information should be obtained as needed.”

—Massachusetts Public Library Trustees Handbook

In the event that the library is not functioning well and the board feels the need to change directors, the evaluation process, although possibly the starting point, is not the best method for removing the director.

New York State is an “employment-at-will” state which means, barring a contract, the board can remove the director without cause. If you have an employment contract with the director, or the director is under Civil Service, you need to show cause. In any case to remove a director you need to build a clear paper trail documenting how you have communicated your dissatisfaction to the director, provided opportunities for improvement, and provided a warning notice if improvement has not happened. This process needs to be done through written communications with the director. Addressing this issue only during an annual evaluation could draw out the process by three years or more.

Governing an effective library is a complex job that takes hard work and dedication. Make your efforts count by regularly evaluating the state of the organization, this will help to make your job as a trustee more fulfilling and create the best possible library for your community.

 Stay tuned for PART 2 of “Evaluating the State of the Library” when we will discuss best practices for evaluating your board.

TRUSTEE INPUT WANTED for Next MHLS Five-Year Plan of Service

MHLS IS ASKING FOR TRUSTEE INPUT for our next five-year Plan of Service. We have scheduled a series of focus groups to facilitate this portion of the planning process. Issues to be discussed include:

- Current library needs
- What MHLS services you use
- How do you define quality library service
- What your library needs for the future

We hope to hear from all types of libraries, all sizes of libraries and libraries from each county. Staff, trustees and Friends should register at <http://www.midhudson.org/evanced/lib/eventcalendar.asp> if planning to attend or call 845.471.6060 x46.

If you cannot attend the meeting closest to your library, you are welcome to attend another scheduled session in your area of interest. If that isn't possible, please call or e-mail your comments. This is a great opportunity to help shape the future of MHLS, and we hope you can find the time to be part of this process.

All meetings will be held from 6:30 P.M. to 8:00 P.M.; dinner will be served.

Below is the schedule for the MHLS five-county region:

- **MONDAY GREENE COUNTY TRUSTEES**
MARCH 6 Catskill Public Library, 1 Franklin Street, Catskill
- **TUESDAY ULSTER COUNTY TRUSTEES**
MARCH 7 Kingston Library, 55 Franklin Street, Kingston
- **THURSDAY PUTNAM COUNTY TRUSTEES**
MARCH 16 Mahopac Library, 668 Route 6, Mahopac
- **MONDAY COLUMBIA COUNTY TRUSTEES**
MARCH 20 Kinderhook Library, 18 Hudson Street, Kinderhook
- **THURSDAY DUTCHESS COUNTY TRUSTEES**
MARCH 23 Starr Library, 68 West Market Street, Rhinebeck

LIBRARY LOBBY DAY IS MARCH 14TH. Join MHLS area library supporters in making the case for better library funding. For more information, visit MHLS Advocacy Central at <http://midhudson.org/funding/advocacy/main.htm> or contact Rebekkah Smith Aldrich at 845.471.6060 x39 or rsmith@midhudson.org.

NEW CONSULTATIONS AVAILABLE FOR TRUSTEES

FOCUS GROUP FACILITATION. Learning what your community wants from your library is a vital component to the planning process. If you would like to do a focus group MHLS staff can help.

CONTACT: Josh Cohen jcohen@midhudson.org | 845.471.6060 x17

YOUR LIBRARY'S MESSAGE. Communicating effectively with your community is essential. Learn how to create the right message for the right audience along with techniques for getting your message out. Time: 1.5 hours.

CONTACT: Rebekkah Smith Aldrich rsmith@midhudson.org | 845.471.6060 x39

For the full menu of consultations available to your board, visit the Trustee Resources section of the MHLS web site at <http://midhudson.org/trustee/main.htm> and look under "Orientation for New Trustees" where you will find MHLS Consultations. Offerings include *sustainable funding, long-range planning, roles and responsibilities of trustees, policies and personnel.*

NEW TRUSTEE HANDBOOK AVAILABLE

The **2005 edition of the Handbook for Public Library Trustees of New York State** is now available. Visit the Trustee Resources section of the MHLS web site to access an online version of the handbook, or contact Rebekkah Smith Aldrich at 845.471.6060 x39 or rsmith@midhudson.org to obtain a print copy.

SPRING 2006: TRUSTEE EDUCATION SCHEDULE

TRUSTEE ESSENTIALS. Essential sessions are designed to provide public library trustees with information about the following areas: *Background & Structure of Libraries in New York State, Roles & Functions of a Board, Running Effective Meetings.* Essential sessions will be held on:

- **Monday, April 3** at the Starr Library, Rhinebeck, 6-8 p.m.
- **Saturday, April 22** at the Catskill Library, 10 a.m.-12 p.m.
- **Monday, April 24** at the Mahopac Library, 6-8 p.m.

ADVANCED TRUSTEE EDUCATION: *Building Community Support for your Library*

- **WEDNESDAY, MAY 10** Mid-Hudson Library System Auditorium, 6-8 p.m.
- **SATURDAY, MAY 20** Hudson Area Association Library, 10 a.m.-12 p.m.