

# Trustee Handbook

## Chapter Six: Evaluating the Director

### Evaluating the Director

- There are several good reasons for carrying out a review of your library director:
- A review provides the director with formal feedback on his/her job performance.
- A review can be a tool for motivation, encouragement, and direction.
- A review can provide the board with valuable information about the operations and performance of the library.
- A review can help to establish a record of unsatisfactory performance if there is ever cause to discipline the director or terminate employment.
- A review can give the board and the director a formal opportunity to evaluate the job description and adjust it as necessary.

### Who should carry out the review?

- Though it is the board as a whole that is responsible for oversight of library operations and the activities of the library director, often boards decide to delegate the task of developing a preliminary evaluation of the director to a personnel committee.
- The key here is consistency and deciding ahead of time who will take part. At any rate, the entire board should review, discuss, and approve the final written evaluation.

### Who should carry out the review?

- Those charged with carrying out the evaluation should avoid relying on chance comments from library employees. Comments solicited from employees with the knowledge of the director can be helpful when solicited in a formal, organized fashion.
- Board members should bear in mind that the director is hired to manage the daily operations of the library on behalf of the board and community. The chain of communications should always flow from library employees through the director to the board.

### Basis for Review

- The performance review should be based on three factors:
- 1. The director's performance as it relates to a written job description (see attached sample form, which incorporates points from the sample job description furnished with Trustee Essential #5).
- 2. A list of objectives for the preceding year jointly written and agreed upon by the director and the board.
- 3. The success of the library in carrying out service programs, as well as the director's contribution to that success.

### Basis for Review

- The director's job description should be kept up to date and be a realistic statement of the work that needs to be done. The director needs to know what is expected.
- A director should not be faulted for failing to do something that was never officially decided at the time of hire or at a later board meeting.
- Including a discussion of the director's job description at the time of hire and during the annual performance review provides an opportunity to change the job description as the needs of the organization change. Job descriptions need to change as technology and environmental factors affect them.

### Basis for Review

- The library director is the resident authority on what is new at the library and how tasks change in light of new priorities. Board members can learn a lot about the library by discussing changes in staff job descriptions with the director.
- Establishing a list of objectives for the director is important to assure continued growth for the director as an individual as well as for the organization. Some objectives may be project oriented, such as completing a weeding of the collection in the coming year, or upgrading the automation system.

### Basis for Review

- Though the director should be the one primarily responsible for suggesting his or her objectives for the coming year, they should be discussed and agreed upon by the board.
- The objectives of the director should be closely related to the strategic plan of the library. Establishing objectives can be an exercise in creativity in searching for new ways to improve the library.

### Basis for Review

- Failure to attain some objectives does not necessarily indicate poor job performance. Many times, outside factors may have prevented success or a director may simply have been too ambitious in the number of projects planned for a year.
- Some objectives may not be reached because they were experimental in nature.
- The important factors to remember when evaluating objectives are progress, initiative, and the willingness of the director to expand the limits of his or her work and understanding. A director who accomplishes all of his/her objectives may be an exceptional employee or may simply have been quite conservative in what he or she set out to do.

### Basis for Review

- Library board members are continually viewing the library from the outside, since they do not participate in the daily management of the organization. Good board members are library users who experience library services first hand.
- As community leaders, they are aware of the image of the library within the community. The library board needs to be able to examine the resources of the library and the resourcefulness of the director and see how these have been utilized to manage library services successfully.

### How to Conduct a Review

- When conducting the annual formal performance review, it is very helpful to have the director fill out review forms as a self-assessment. The board, or review committee, should fill out a second set of forms. By comparing assessments, the director and board can easily establish areas of agreement and work to resolve disagreements.
- The director's self-assessments may or may not be considered part of the permanent record; however, the director should have the opportunity to respond in writing to reviews placed in his or her permanent file.

### How to Conduct a Review

- No performance review should ever be placed in a personnel file without the knowledge of the director. The director should sign the review indicating that he or she has been given the opportunity to read and discuss the evaluation. Signing a review should not be construed as agreement.
- The basis of the evaluation should be the up-to-date job description and the annual performance objectives agreed to by the director and board.

### Key Questions

- How well has the director utilized the resources available to him/her? Is library service provided efficiently and effectively at your public library?
- Does the community like and respect the director? Is he/she accessible? Do people enjoy coming to the library?
- Is the library in good financial shape? Does the director stay within the budget and provide clear and timely reports to the board? Does the annual budget, as initially drafted by the director, adequately reflect the needs for library service in the community? Is the director successful in obtaining necessary funding (with the help and involvement of the board)?

### Key Questions

- Does the director communicate effectively to staff? Is he/she a good supervisor?
- Is use of the library increasing? If not, why not? (Success is not strictly the responsibility of the director, but of course he/she has much direct influence.)
- Is the director creative, willing to try new things, and does he or she give considerable effort to making programs work?

### Key Questions

- ☒ Does the director accurately and fully provide the board with the information you need to do your job? Does the director provide the board with well-considered advice?
- Has the director put appropriate effort into achievement of the annual objectives agreed to between the board and director? Is the director striving to accomplish the goals and objectives of the library's strategic plan?

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- <https://dpi.wi.gov/pld/boards-directors/trustee-essentials-handbook>