

# Board Evaluation

A key to your library's success

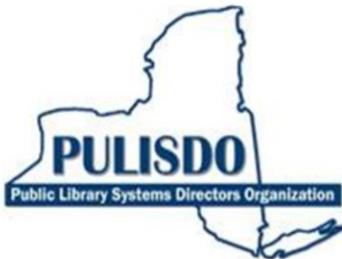
Helping All Trustees Succeed | Mini-Webinar Series | New York State Library | Rebekkah Smith Aldrich

Hello! Thank you for joining us for this installment of the Helping All Trustees Succeed Mini-Webinar series which is focused on evaluating your board.

My name is Rebekkah Smith Aldrich, I am the Coordinator for Library Sustainability for the Mid-Hudson Library System and co-author of the Handbook for Library Trustees of New York State.

Thank you to New York State Library for partnering with us in providing this educational opportunity for public library trustees.

This is a “mini-webinar”: our goal is to give you an introduction to the topic in less than 15 minutes.



New  
York State  
Library



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*Connecting trustees through advocacy, recognition and education*

NEW YORK LIBRARY ASSOCIATION  
*The Voice of the Library Community*

## Project Partners

The Helping All Trustees Succeed program, often referred to as “HATS,” was made possible thanks to the collaborative efforts of the library community of New York State.

The State Library, Directors of Public Library Systems, the Library Trustee Association and the New York Library Association were joined by hundreds of trustees from around New York State to help shape the content and delivery of the HATS mini-webinar series.

Another great example of how we are stronger when we work together.



Library Leadership

Why Evaluation Matters

What To Evaluate

Process Tips

# FOCUS AREAS

In this webinar we will provide an introduction to board evaluation:

- Who is involved
- Why this process will improve your experience on the board and create a stronger library
- What you are actually evaluating and
- How you might go about conducting the evaluation

Director + Board  
=  
Co-Leaders

**See Also:** *The Critical Partnership: Public Library Trustees and Directors Webinar*

The management and operation of a library are accomplished through a partnership among trustees, the library director, staff and volunteers. The library director and board act as co-leaders of the library, working in partnership to create a viable, visible and vibrant library for the community. One cannot do their job without the other. Therefore it is critical that both sides of the equation evaluate their effectiveness in their role.

# The Why Behind the What

- Clear Communication
- Goals & Objectives
- Motivation, Direction & Encouragement
- Identify Areas for Development

A healthy board will make the time to evaluate their own performance, not just the performance of their library director.

This process is an opportunity to celebrate what is going well and to find ways to course correct when something could be going better.

Done well, the process can spark necessary conversation, result in clear goals for the coming year and provide a platform to identify where the board has opportunities to strengthen group dynamics through education and team building.

# Key Documents

- Handbook for Library Trustees of New York State
- Long-Range Plan & Annual Goals
- Committee Descriptions
- Bylaws

The board should evaluate themselves against the duties and responsibilities found in the Handbook for Library Trustees of New York State as well as the library's strategic plan, bylaws, policies and procedures.

Your goal is to assess whether or not the board is moving the library forward effectively for the maximum benefit of the community and these documents provides guidance and benchmarks against which to evaluate the board's performance.

# Areas for Consideration

- Do all trustees understand their responsibilities?
- Is the organization advancing in the direction set out in the plan?
- Does the library have a good reputation in the community?
- Are stakeholders inspired to invest in your library?
- Is the board governing or managing?
- Are your meetings well run?

Let's take a closer look at the types of question you might ask during your board's evaluation.

to tackle this issue if necessary.

- Are stakeholders inspired to invest in your library? Are you winning at the polls? Are private donations coming in? Are grant makers responding to your requests? If not, you've got some strategic thinking to do to reposition the library as a great investment.
- Is the board governing or managing? Role clarity is key. If your board is slipping into managing, which is the library director's job, you are likely neglecting your true role which is to govern the library.
- Are your meetings well run? Efficient and effective meetings can make or break a board and are key to future trustee recruitment and volunteer satisfaction.

# Process

- Discuss & Agree
- Full Involvement of the Board
- Form Examples

How you conduct the board evaluation is up to your board.

But all boards should begin by discussing the purpose of the evaluation and agree on the process that will be used.

The evaluation can be organized by the library's executive committee, or if you have one, the board development committee. All trustees should participate.

There are lots of models out there, you can check out samples from the National Council of Nonprofits and the Mid-Hudson Library System.

Refer to the Handbook for Library Trustees of New York State for links to these resources.

# Goal Identification

Your process should result in goals for your board for the coming year that all agree on.

Maybe you've identified the need for education for the board. Set a goal to ask your public library system for assistance or to provide a travel stipend for trustees to attend regional workshop and conference opportunities. .

Maybe you've discovered that the board isn't quite sure if you have a good reputation or not. Set a goal to do some community outreach and engagement work over the next 12 months.

Maybe your win margin at the polls has been slipping. Set a goal to increase the number of yes votes you get the next time you go out for a vote.

What ever you decide to do, make sure it is a good use of trustee time and will, at the end of the day, result in a stronger, more sustainable library for your community.

# Handbook for Library Trustees of New York State



For more information on the topics touched on in this mini-webinar please consult the Handbook for Library Trustees of New York State

# Questions?

**Contact your public library system**  
<http://tiny.cc/PULISDO>

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Got questions? Hungry to learn more?

Your public library system is your best source of local help.

If you have questions about any of the issues presented in this mini-webinar please reach out to your System.

Thank you for taking the time to learn more about your role as a public library trustee. We hope this mini-webinar has helped to increase your confidence and comfort level.

Thank you for volunteering to make your community a better place through your public library.