

# Director Evaluation

A key to your library's success

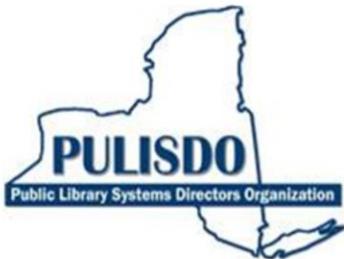
Helping All Trustees Succeed | Mini-WebinarSeries | New York State Library | Rebekkah Smith Aldrich

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

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.



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# 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.



In this webinar we will provide an introduction to conducting an evaluation of your director:

- . Who is involved
- . Why this process will improve your experience on the board and create a stronger library
- . What you are actually evaluating
- . How you might go about conducting the evaluation and
- . The importance of a companion plan for board 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
- Compensation Decisions
- Motivation, Direction & Encouragement
- Documentation of Unsatisfactory Performance

A review provides the director with formal feedback on their job performance and is part of the two-sided coin of evaluation of the library's leadership performance, the other side being the board's performance;

The director evaluation process provides the board with critical information about the operations and performance of the library and should be conducted in such a way to inform the evaluation of progress on the library's long-range plan;

The evaluation process can be used to establish the short-term goals and objectives of the library, as well as a performance plan for the coming year for the director

A meaningful evaluation process can link compensation to job performance;

A thoughtful evaluation can improve communication and provide motivation, direction and encouragement to maximize what is going well;

The formal evaluation process is necessary to properly document unsatisfactory performance in the unfortunate event that mid-year course correction is not effective.

# Evaluation Models

## Traditional

Focus on Director

Assumes Hierarchical Manager-Employee Relationship

Personality Driven

Focus on What is Wrong

Develops Methods for Improving Director

Corrects Past Problems

## Recommended

Focus on Library

Assumes Governance-Executive Partnership

Performance Driven

Focus on Success

Develops Methods for Improving Library

Builds Future Development

*Source: "Evaluating the State of the Library - Director Evaluation," Mid-Hudson Library System*

Key to your process will be the acknowledgement of the unique nature of the board-director relationship. While the board has the authority to hire and fire the director, in between the arrival and departure of your director you are partners. Your process should respect this relationship and the role of the director.

As this relationship is not a typical hierarchical management relationship a typical employee evaluation method is not ideal. Your job as a trustee is to ensure high quality library service for the residents of your community, the evaluation process should focus on the library and how well the director's performance is contributing to the successful delivery of services.

Focus on success and the future, encourage your director, note things they have done that are making your library and board a success. Make sure expectations are clear and the director understands what you need from them as you move forward into the coming year. Remember, you're a team. This is an opportunity to solidify that relationship, continue what should be an ongoing dialog with the director and provide a pivot point from which to advance the library's strategic plan.

# Key Documents

- Job Description
- Contract
- Long-Range Plan & Annual Goals

It is essential that a written, reasonable and up-to-date job description be in place as a benchmark. Have a written agreement or contract stating the director's conditions of employment, salary and benefits, and the evaluation methodology; this ensures both the director and board know what to expect.

It is also important to mutually develop an annual performance plan with the director. The annual evaluation is the time when members of the board and their chief executive focus on the important issues facing the library and evaluate how the director and the Board are performing as a team.

# Process

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

There are many sample evaluation forms available, but it is the process itself that is most important, not the form.

In order to make the process more effective consider the following tips:

- Conduct a written evaluation of the critical aspects of the job by all members of the board or have the director provide a detailed self-evaluation for board review and discussion;
- Evaluate the director's performance against the goals and objectives of the director's performance plan, the library's long range and strategic plans;
- Make sure the entire board participates in the evaluation process;
- Be open and honest and do it face to face.
- Use the opportunity to evaluate the board's performance as well

Sample evaluation forms are linked within the Handbook for Library Trustees of New York State.

# Board Self-Evaluation

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.

Check out the companion mini-webinar on Board Evaluation for more information.

# Handbook for Library Trustees of New York State



For links to sample forms and 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 topics 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.