

## Director Evaluation 101

By Lisa Peet

A well-organized Board of Trustees works as a team with its library director. At the same time, it is also the board's responsibility to evaluate its director on a regular basis—most often annually—whether that director has been serving for one year, five, or 20. This review can present itself as a disruption of a well-established balance, or a diplomatic challenge when problems need to be addressed.

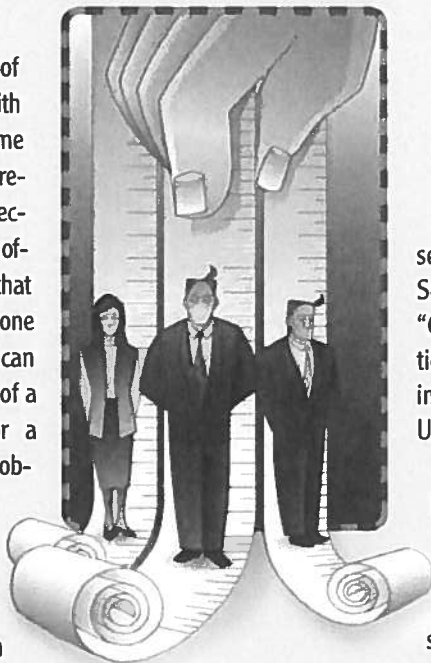
While such an appraisal can feel worryingly subjective, it doesn't need to be. A board that follows an organized evaluation process, using well-thought-out criteria, will provide the director with useful feedback and can also offer valuable insight into the library's operations and performance. If a director's evaluation is unsatisfactory, the review can motivate a course of improvement or, in the worst case, build a clear paper trail if there is cause for discipline or termination.

As with many other trustee activities, there are plenty of guidelines available for evaluating a director constructively and for anticipating issues before they become problems. The following is taken in part from the *Across the Board* newsletter for trustees from the Mid-Hudson Library System (MHLS), Poughkeepsie, NY, but it can be altered to fit nearly any library.

MHLS notes first and foremost that the relationship between board and director is not the same as that of a manager and employee. Rather, it is a partnership formed for the purpose of running the library. "Rather than evaluating the director," the guidelines state, "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."

### FOCUSING ON THE LIBRARY

MHLS points out that focusing on the library, rather than on the director, keeps the evaluation performance-driven as opposed to personality-driven. The first step is to assess the state of the library, identifying key operations. MHLS suggests:



- Customer Service and Community Relations
- Organizational Growth
- Administration and Human Resource Management
- Financial Management and Legal Compliance
- Relationship with the Board of Trustees

A form can then be structured to assess the items on the list, separating each into relevant components; for instance, Customer Service can be broken out into "Levels of patron satisfaction," "Customer service received by patrons," and "Consistent application of policies that affect the public." Every line is then given a rating (e.g., E=excellent; S=satisfactory; N=needs improvement; U=unknown).

Each board member should then fill out a copy as completely as possible, also referencing, if appropriate, the library's plan of service, board minutes, usage statistics, program results, the previous year's evaluation goals, and any other pertinent data.

Once all the forms have been completed, the board should summarize the results (a sample summation form can be found at [ow.ly/TWSwt](http://ow.ly/TWSwt)). This will offer a snapshot of how the library is functioning as a whole, which can then be implemented as follows:

- If the summation shows that the library is doing well, the evaluation should focus on supporting and motivating the director to keep everything moving forward.
- If there are items that need addressing, the board should use the evaluation process to offer support and motivation to the director, as well as to clarify expectations going forward.
- If the results are unsatisfactory, the board should clearly identify the issues, determine what is needed to get operations on track, and create a time line for progress reports.

### REVIEWING THE RESULTS

Once the board has reviewed the results and agreed on a plan of action, it should then meet with the director—either as a full board in executive session, a committee, or one or two delegated members. The board should use the time to discuss areas of strength and weakness within the library as a whole and then, working with the director, develop goals for the organization's improvement.

Most important, the board's review should not be a reaction to a problem situation but should be a regular form of maintenance for a good working partnership. As the guidelines point out, "The director evaluation should be an annual event and the best and easiest time to begin this schedule is when things are going well."

*Lisa Peet is Associate News Editor, Library Journal*