

Evaluating the Library Director

State Library of Iowa

April 21, 2009
5:30 to 7:00 p.m.

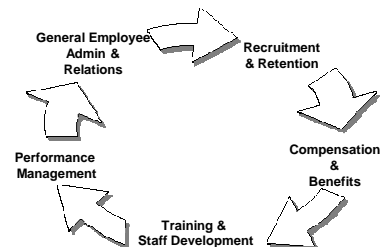
Presenters

- Bonnie McKewon, Northwest Library Services
- Sandy Dixon, State Library of Iowa

Learning Objectives At the end of the program...

- Feel more confident about conducting an evaluation of the library director
- Be able to discuss some steps for planning an evaluation
- Be familiar with several evaluation formats
- Give some ideas for addressing poor performance

5 Major Functions of Human Resources ...



Why Is an Annual Evaluation Important?

- Director has a clear explanation of the board's expectations
- Director receives feedback on how well she or he are meeting the expectations
- Opportunity to acknowledge the director's accomplishments
- Opportunity to make improvements

What Needs to Be in Place

- Written job description
- Board has met with the director to discuss expectations for the coming year
- Board and director have agreed on an evaluation method

Always Look For Connections ☺ Connect Director Evaluation To...

- ⦿ Board Responsibilities
- ⦿ Library Standards (In Service to Iowa)
- ⦿ Policies
- ⦿ Customer Service
- ⦿ Job Description / Competencies

Board Responsibilities Connect to Director Evaluation

- ⦿ Hiring & evaluating the library director
- ⦿ Setting & overseeing the budget
- ⦿ Adopting policies
- ⦿ Planning for library advancements
- ⦿ Advocating for the library's success

From...The Library Trustees' Handbook, 2009
See Chapter 13

Library Standards Connect to Director Evaluation

- ⦿ In particular Standard #23: Each employee's performance, including the director, is evaluated at least annually (not required in any Tier...)
- ⦿ In addition to staffing, other standards address governance, administration and funding; collection; services; public/community relations; access and facilities.

From...In Service to Iowa, 2004

Policies Connect to Director Evaluation

Boards approve personnel policies for all staff

- ⦿ Include process for director evaluation
- ⦿ Ensure that director likewise evaluates staff
- ⦿ Include "relationship" statements and/or organizational chart



Customer Service Connects to Director Evaluation

Boards care about customer service

- ⦿ Staff training leads to efficiencies, proficiencies, greater understanding of new technologies
- ⦿ Evaluations leads to introspection, better communication, improved job performance
- ⦿ Top down vs. 360°

KSAs Connect to Director Evaluation... Knowledge, Skills, Abilities

Job descriptions should state what KSAs are required in each position

- ⦿ **Knowledge** = level of education, specific expertise, previous work experience
- ⦿ **Skills** = manual and mental capabilities acquired through training & experience
- ⦿ **Abilities** = innate qualities, personality traits, attributes
- ⦿ **Competencies** = ☺ All of the above ☺

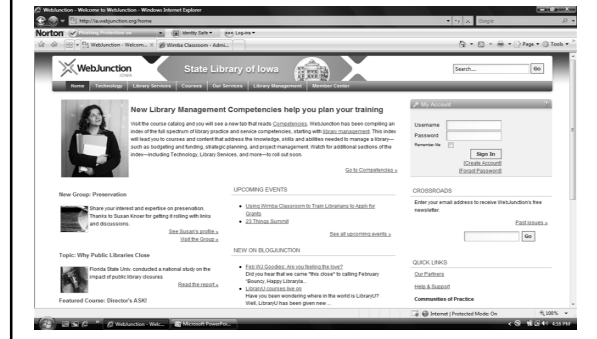
Let's Come Back to Director Competencies...

Adapted from WebJunction

- Personnel Management
- Planning
- Budget & Finance
- Policies & Procedures
- Facilities
- Marketing
- Relations



WebJunction / WebJunction Iowa



What's Been Your Experience with Performance Evaluations?

Performance Evaluations— What Should They Achieve ??

- Acknowledge accomplishments
- Set out management goals on both sides
- Demonstrate accountability / credibility
- Build communication



What About a Format?

Northwest Iowa Library Services Administrator Performance Evaluation

Position reports to: NWILS Board of Trustees
Position supervises: NWILS Staff and Consulting Team

Rating scale:
 1 = unsatisfactory; performance fails to meet most job expectations
 2 = need improvement; performance fails to meet several job expectations
 3 = satisfactory; performance is adequate; meeting expectations; developing within the position.
 4 = very good; performance generally meets or exceeds standards and expectations; attains all or nearly all of the position objectives.
 5 = excellent; performance is clearly outstanding; exceeds expectations; exceptional on a consistent basis.

Note: total weight for the first 4 grids should equal 100% of time spent.

GRID #1. PRIMARY AREA OF RESPONSIBILITY: SERVICE MANAGEMENT		
Estimated weight for this grid - 40%	Rating	Comments
Directs the planning and implementation of NWILS mandated Services to 115 public libraries in the areas of consulting, continuing education, interlibrary loan, and back-up reference.		
Acts as senior consultant for local library staff, trustees, and government officials in the scope of public library management, governance, and laws.		
Assists in developing and recommending policies for NWILS operations, programs, and services in cooperation with NWILS Board.		
Works with NWILS Board, Advisory Council, Consulting Team, and Back-Up Reference Team in strengthening existing services and in exploring new service opportunities.		

GRID #2. PRIMARY AREA OF RESPONSIBILITY: FINANCIAL MANAGEMENT
Estimated weight for this grid = 20%

	Rating	Comments
Works with NWILS Board in developing the annual budget and in managing the budget throughout the year.		
Serves as executive secretary to the Board, preparing agendas, transcribing minutes, gathering financial reports, and providing supporting documentation for Board packets and Board meetings.		
Prepares and/or oversees the preparation of all invoices for payment.		
Coordinates delivery and pickup of check packets to/from accountant's office.		
Coordinates check signing with board members.		
Oversees bank deposits and fund transfers.		
Works in cooperation with contracted accounting service.		
Works in cooperation with contracted auditing firm.		

GRID #3. PRIMARY AREA OF RESPONSIBILITY: PERSONNEL MANAGEMENT
Estimated weight for this grid = 10%

	Rating	Comments
Hires, supervises, and evaluates NWILS staff; contracts & facilitates evaluation of Consulting Team.		
Recommends staff salary adjustments in conjunction with annual budget development process.		
Drafts and revises job descriptions for all positions.		
Encourages and provides staff training and development opportunities.		
Monitors and evaluates office procedures.		
Promotes an atmosphere of mutual respect and teamwork amongst office staff and consulting team.		

GRID #4. ADDITIONAL AREAS OF RESPONSIBILITY:
Estimated weight for this grid = 40%

	Rating	Comments
Coordinates and promotes NWILS services with those of other LSA's, the State Library, IIA, etc.		
Advises local libraries in matters of regional, state, and federally initiatives in order to enhance local library service (WILSON, PLOW, ERSCO, FirstSearch, Gates Search, etc.)		
Plans continuing education workshops for local library staff and trustees, including teaching various workshops for NWILS and reciprocity for other LSA's, State Library, IIA, etc.		
Maintains frequent communication with member libraries by phone, electronically, and with web-based tools.		
Represents NWILS at meetings of county associations, roundtables, user groups, LSA/State Library meetings, etc.		
Coordinates writing and distributing NWILS weekly e-bulletin MONDAY MORNING EYE-OPENER; maintains NWILS website, wiki, and blog.		

GRID #5. KNOWLEDGE, SKILLS, and ABILITIES:
This grid is not included in the weighting.

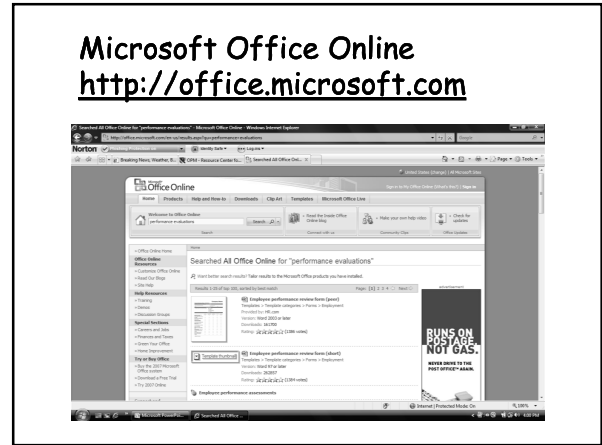
	Rating	Comments
Demonstrates written and verbal communication skills		
Exhibits public speaking skills and teaching abilities		
Proficient in software applications, internet applications, and web-based communication tools		
Demonstrates team building and leadership		
Capable of building and maintaining professional rapport and relationships with members, library staff, trustees, local governing officials, the State Library, other LSA's, and IIA		
Committed to providing consistent, quality customer service		
Advocates for public library service		
Committed to improving job skills and performance		

JOB PERFORMANCE NARRATIVE

- What are the administrator's outstanding abilities and strongest attributes?
- In what area(s) does the administrator need to strengthen skills or show improvement?
- Highlight specific job accomplishments or challenges since the last performance review.
- NWILS Administrator:** List your service / management goals for 2008-2009
- NWILS Board:** List your service / management goals for the administrator in 2008-2009.
- List mutually agreed-upon goals
- Additional comments

Board member(s) signature _____
 Administrator's signature _____
 Date completed _____

adminperform08



Sample Evaluation from Trustee Handbook

Responsibilities	Expectations and Goals	Comments
Overall Performance Comments	<input type="checkbox"/> Exceeds expectations <input type="checkbox"/> Meets expectations <input type="checkbox"/> Does not meet expectations Employee: ___ Agree ___ Disagree Signature _____ Date _____ Board Signature _____ Date _____	

State of Iowa "Position Description"

% of Time	Work Performed
30%	Manages, directs coordinates and markets Library Development (LD) programs and services.
25%	Manages the LSTA program.
20%	Supervises LD staff.
15%	Participates in overall division management, decision-making including planning, budget and personnel
10%	Coordinates LD activities and planning with other State Library units and other organizations.

State of Iowa Performance Plan & Evaluation

Goal	Action Steps	Performance Criteria	Timetable
Monitor implementation of 2008-2012 LSTA Plan	<ul style="list-style-type: none"> •Review plan quarterly with staff •Review plan with Commission annually 	<ul style="list-style-type: none"> •Measurable progress is made toward accomplishing objectives •Data is collected 	Evaluation period
Results: Summary			
<input type="checkbox"/> Exceeds expectations <input type="checkbox"/> Meets expectations <input type="checkbox"/> Does not meet expectations			

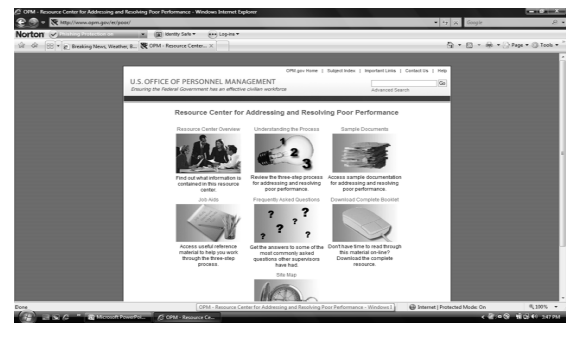
Evaluating the Director is Most Effective When...

- ⊙ It's based on identified KSAs
- ⊙ It's based on a solid format and process
- ⊙ It's thoughtful—no hurries, no surprises
- ⊙ It's honest



Have you had to deal with poor job performance?

U.S Office of Personnel Management www.opm.gov/er/poor



Dealing with Poor Job Performance

Legal violations, ethical violations, insubordination,
unresponsive to change

OPM Offers a 3-Step Process

1. Communicate expectations
2. Provide opportunities to improve
3. Take action

Also...seek legal advice



Let's Go There...OPM

Management for the Rest of Us www.mftrou.com



Background Resources...

- © Goodrich, Jeanne & Paula Singer. Human Resources For Results. ALA, c2007
- © Houghton-Jan, Sarah. Technology Competencies and Training for Libraries. ALA Tech Source, c2007
- © *Library Technology Reports*. "Changing the Way We Work." Michelle Boule, ALA Tech Source, 2008.
- © Singer, Paula. Developing a Compensation Plan for Your Library. ALA, c2006
- © State Library of Iowa. In Service to Iowa: Public Library Measures of Quality, 2004.
- © State Library of Iowa. Iowa Library Trustees' Handbook, 2009

Resources cont...

- © Fair Labor Standards Act (FLSA)
www.dol.gov
- © Iowa League of Cities
www.iowaleague.org
- © Iowa Workforce Development
www.iowaworkforce.org
- © Management for the Rest of Us
www.mftrou.com
- © Microsoft Office Online
<http://office.microsoft.com>

Resources cont...

- © Iowa Public Library Statistics (State Library)
- © Pay Equity Toolkit
www.statelibraryofiowa.org/ld/librarians/pay-equity
- © Tech Atlas via WebJunction
<http://ia.webjunction.org/techatlas>
- © U.S. Office of Personnel Management
www.opm.gov/er/poor
- © Sample documents available @ LSA / State Library