Chapter 13: Evaluating the Library Director

Just as the library director regularly evaluates the staff, it is the responsibility of the board to regularly evaluate the library director. Trustees evaluate the director all of the time–by what they see in the library, what they hear form the public and what they perceive as the library's reputation in the community. But that informal consideration does not take the place of a formal review of the director's performance. The best way to evaluate and monitor director effectiveness is by providing a good job description for the director and then doing a formal, annual evaluation to determine how well the director is meeting the job description and accomplishing library goals.

An annual evaluation:

❑   Provides the director with a clear understanding of the board's expectations
❑   Ensures the director is aware of how well the expectations are being met
❑   Serves as a formal vehicle of communication between the board and director
❑   Identifies the board's actual concerns so that appropriate action can be taken
❑   Creates an opportunity to review and acknowledge the director's accomplishments
❑   Documents annual accomplishments of the library
❑   Demonstrates sound management practices and accountability to municipal officials and the community.

The format and procedure for director evaluation must be worked out by each board, but it is important for each board member to understand what is appropriate and inappropriate for the evaluation. The method used should be agreed upon by the board and director at the beginning of the evaluation period so it is clear to both the board and director what the basis for the evaluation will be.

Make the evaluation a positive effort to communicate better with the director. A written evaluation allows the board and the director a system to communicate about how to make the library better. Look as much for what the director does well as for areas that need improvement. Then, the cycle starts again by deciding the basis of the evaluation for the coming year's performance.

Acknowledge and reward good performance; work with the director to correct inadequate areas of performance. If problems arise with the director's performance during the year, the board should discuss these problems with the director at that time, along with possible solutions. **At the time of the annual evaluation, there should be no surprises.**

Evaluation Criteria

Your community, the library and the board's priorities will determine what factors to consider when evaluating the performance of the director. The following list gives you some points to consider.

Preparing and managing the budget
❑   Is the preparation work completed in a timely manner for the Board?
❑   Does the budget cover all necessary expenses?
❑   Are funds allocated or reserved for unanticipated contingencies?
❑   Are the funds allocated effectively?
❑   Are major corrections to the budget during the fiscal year avoided?

Managing the staff
- ❑ Are positive management/staff relations maintained?
- ❑ Are fair and equitable policies proposed for Board adoption and then fairly administered?
- ❑ Have grievances been filed? If so, what is their nature?

Keeping current
- ❑ Are innovations in service delivery and technology studied thoroughly and implemented if they fit the needs of the library and are proven to be cost effective?
- ❑ Does the director maintain current knowledge of best library practice?
- ❑ Is the staff encouraged and assisted in learning about best library practice?

Collection management
- ❑ How adequately does the library identify needs and interests in the community and translate these into the library's collection and services?
- ❑ Have priorities been established to enable the library to respond to a potential budget cut?

Implementation of board decisions
- ❑ Are board decisions implemented on a timely basis?
- ❑ Once board decisions have been made, does the director support and not undermine them?

Use of the library
- ❑ How effectively are the current and new services of the library communicated to the public?
- ❑ Are circulation trends, program attendance, reference questions, Internet use and other uses of the library analyzed with appropriate action taken?

Staff selection
- ❑ Is the selection process designed to ensure that the best person is hired?
- ❑ Is the selection process consistent with legal requirements?

Development of staff
- ❑ Does staff receive training adequate to perform their jobs?
- ❑ Is staff encouraged to develop career goals and/or goals for learning new skills?
- ❑ Does the director promote staff development and support it with funding?

Use of staff
- ❑ Have peak service hours been identified and staff assigned accordingly?
- ❑ Are staff functions analyzed periodically with the objective of combining or eliminating tasks or creating new assignments?
- ❑ Are staff workloads equitable?
- ❑ Are job descriptions current?
- ❑ Does the director conduct regular performance evaluations?

Planning
- ❑ Does the library have a current plan and does the plan reflect board priorities?
- ❑ Is the plan updated to reflect changing circumstances?
- ❑ Are the director's activities and accomplishments consistent with the plan?
- ❑ Is the plan flexible enough to allow for changing circumstances?
- ❑ Does the director provide enough information to the board about implementing the plan?

Miscellaneous rating factors
- ❑ Are "hard decisions" made and implemented or are they deferred or ignored?

- ❑ Does the director display initiative?
- ❑ Does the director make decisions objectively or do personal biases intrude?
- ❑ Is the director open with the board about both accomplishments and problems?
- ❑ Does the director set an example for other staff through professional conduct, high principles, good work habits, etc.?

As stated earlier, the format and procedure for director evaluation must be worked out by each board and should be agreed upon by the board and director at the beginning of the evaluation period. On the next page is a sample form to give boards a starting point.

Dismissing the Library Director

Probably the most painful situation a public library board can face is the dismissal of the library director. Boards that hire carefully, communicate well, nurture positive working relationships, and evaluate effectively should not have to experience this unpleasant task. When all potential solutions have been tried and the problems still cannot be resolved, dismissal is a last resort.

Directors are usually dismissed only after serious infractions of board policy, violation of the law, or very poor performance coupled with unwillingness or inability to improve. <u>It is important that reasons for dismissal are carefully documented</u>. The board has a responsibility to ensure that personalities and biases are not factors in any dismissal decision. The dismissal and/or appeals procedure should be described explicitly in board policy and allow the director a full hearing to discuss specific charges. A board should not begin a dismissal process unless it understands the implications, has consulted with the appropriate local government officials, believe its position is defensible, and has obtained appropriate legal advice from an attorney.

The following factors should be considered prior to making a final decision to dismiss a library director:

- ❑ Was there notice given to the employee?

- ❑ Was the reason for termination reasonably related to library employment?

- ❑ Was there an investigation and documentation?

- ❑ Was the investigation fair and objective?

- ❑ Was there proof of a violation?

- ❑ Is there equal treatment of other library employees in similar situations?

- ❑ Is termination of the library director an appropriate disciplinary action? Even if the library director has done something wrong, has been given notice, and has not ceased the activity, is termination too harsh a penalty? Or would some other consequence be more reasonable?

Sample Evaluation Form

Name:	Evaluation Period:

Responsibilities	Expectations and Goals	Comments

Overall Performance

Comments:	Performance Rating:
	_____ Exceeds expectations _____ Meets expectations _____ Does not meet expectations Employee: ___ Agree ___ Disagree Signature _____ Date _____ Board Signature _____ Date _____