

Chapter 16: Monitoring and Evaluating Library Success

Board members monitor and evaluate overall results. For example, you should not be in the library every day monitoring the kind of service provided by library staff. But the board can survey the community to measure the satisfaction of those who use the library and to identify strengths and areas for improvement.

The very term “trustee” indicates what the community expects from you. The community puts its trust in you to make sure the library is operating the way it should. It’s your job to keep an eye on the progress of the library for the community.

Finance is one of the most difficult items you will have to monitor and evaluate, but it doesn’t have to be an overwhelming task. Begin your monitoring with careful attention to the budget, the board’s financial plan for the library. The budget will be prepared by the director and staff and presented to the board for approval. When the budget is presented, ask whatever questions necessary to gain a reasonable understanding of this financial plan—basically, where the money is coming from and where it will be spent.

Monthly financial reports to the board are the tools used to monitor how well the director and staff are following the financial plan the board approved when they voted on the budget. If you don’t understand the reports, ask the director for an explanation. You don’t have to know everything about the finances, just enough to feel comfortable that the money is coming in and going out according to your budget plan.

Financial reports will cover both the revenue side and the expense side of the budget. On the expense side, you should understand what was budgeted, what has been expended to this point, the difference between the spending plan and what is actually being spent, and the reasons for the differences. The same is true for the revenue side. How much money did you anticipate at this point? What has actually come in? What’s the difference and why is there a difference?

New board members should receive a good orientation about library finance and how to monitor financial status. **Ask questions if the:**

- budget is not clear to you
- financial report is not clear to you
- audit report is not clear to you

See Chapter 9 for a more complete discussion of library finance.