



A Library Board's

Practical Guide to

Evaluating the Library Director

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March 2016

PREFACE

An important way to ensure and support a highly effective library director is to commit to meaningful performance appraisals at least annually. It's surprising how often this very important duty gets short shrift or even overlooked altogether. Even if you are having problems with your director (perhaps *especially* if you are having problems with your director), the evaluation process should be a positive and highly productive way of ensuring that your director is meeting his or her goals and that, as a result, the library is moving forward.

THE EVALUATION PROCESS

Ideally, what is outlined in a performance review should not come as a surprise to anyone involved. This is because the board or its executive committee should have had a discussion at the beginning of each year to set goals for achievement and professional growth with the director. These should be goals that are negotiated with the expected outcomes that clearly state how this will help move the library forward in fulfilling its mission. If you've completed a strategic plan, the goals should be linked to the plan.

By linking evaluation to goal completion, the board can be assured that the director and the board are heading in the same direction and have identified the same priorities. In addition, this link keeps the evaluation as objective as any evaluation can ever be and, therefore, it should be an honest assessment that leads to the groundwork of setting the next year's goals. By negotiating goals for achievement ahead of time, the director and the board know what is expected thereby avoiding any "gotchas" in the process.

Whatever method you use for evaluating performance, it is critical to do so in writing. The director deserves a written evaluation and a copy should also be placed in his or her personnel file. In addition, if you are in the process of working with a director who is not fully meeting expectations these evaluations will be evidence of your expectations and the director's performance – at least as you see it and have articulated it to him or her.

When determining with the director what performance goals to focus on for the coming year, a good place to start is with the director's job description and the most recent strategic plan. While the board oversees and often initiates the planning process, the director is ultimately responsible for its implementation. Therefore, this is a good document by which to assess where the library is currently and where it needs to go to meet the goals of the plan.

Though not necessarily a comprehensive list of focus areas, generally the library director should be evaluated on the following:

Staff Relationships and Management

If a staff suffers from low morale or a lack of leadership, service delivery will suffer. It's important to assess whether a director is interacting in a positive way with staff. This can be a tricky area for assessment. On the one hand, you do not want to have staff members coming to you to report on negative aspects of a director's performance. This is an area ripe for a disgruntled employee to exact revenge and is a highly dysfunctional course of action. There should, instead, be a written grievance policy and all employees should be compelled to follow it if they have concerns. If you've had several grievances, this should be of concern and should be discussed with the director as soon as they come in to try to ascertain the legitimacy of the complaints.

Many boards struggle with the idea of having the staff evaluate the director. This can help to identify problems if you suspect they are there. In a library where staff is doing excellent work and there are no signs of low morale, however, staff evaluations of the director can end up causing problems where there were none. Again, these evaluations – often done with the promise of anonymity – are perfect tools for gripes of all stripes, whether legitimate or not, and create a situation where the director is, in a way, accountable to staff rather than the other way around.

It may be that the best way to evaluate this is for board members to look at the overall accomplishments of the director and the staff. If these are high, there is probably a high degree of mutual respect and cooperation in place. It also helps to talk to the director about the various teams that are in place, what their goals are, and what they've accomplished.

Certainly, trustees who visit and use the library should be able to see whether the quality of service is consistently high and friendly – if not, this could be another sign of trouble.

Library Goals as Stated in the Strategic Plan

Once goal are set, the library director and his or her staff will develop strategies to meet these goals. There will be tangible ways to measure and evaluate success. For example:

- Are efforts ongoing?
- Is the entire staff engaged?
- What outcomes are evident from the work of the staff and director that show achievement and continuous improvement?
- What specific goals have been accomplished and which ones will need added focus in the coming year?

Financial Responsibility and Oversight

The use of financial resources is another way to objectively evaluate performance. For example:

- Is the budget on target?
- Is the money well spent during the course of the year and in the “black”?
- Do the programs supported by the budget reflect the priorities set by the board and the strategic plan?
- What about financial development?
 - Does the library director work well with the Friends group and foundation?
 - Have there been efforts to reduce the costs of outside services to the library in order to maximize the collection and programs budgets?
 - Have grants been written?
 - Have partnerships been created with civic organizations to help fund special literacy projects?

Overall Quality of Library Services

Assessing the quality of library services is perhaps the most subjective area of the evaluation even though it may be the most important. Here are some ways to make the assessment:

- How innovative are your library services?
- Do you get feedback from the public about the quality and scope of the collection?
- Are your services highly used?
- What kind of media attention do library services get?
- Do the services delivered meet or attempt to meet the goal of reaching everyone in the community?
- How does the director determine the effectiveness of service design and delivery and in what ways does he or she make changes to continuously improve services?

Community Relations

Library services will depend a lot on how effective, visible and active the library director is in the community. This area should be included in the evaluation. For example:

- Is the library director identifiable as a leader in the community?
- Does he or she participate in task forces and committees within the community?

- Is the library regularly highlighted in the media?
- Does the director have the respect of community government leaders?
- Does the director foster a library volunteer program?
- Is he or she a high-profile library promoter?

Facilities Management

If the library is not a city or county department, it is likely that the library director is responsible for the upkeep of the library facilities. This is another area for evaluation. For T

- Does the director ensure that the library is always clean, safe and well maintained?
- If the budget is lacking for maintenance upkeep, what has the director done to try to address this issue?
- Is there a capital plan in place to address long-term facilities maintenance?
- Are marketing and merchandising techniques used to highlight the library's collections and services?
- Is there good signage within the library to help patrons access various areas of service?
- Are signs directing community members to the library facility clear and visible?
- Is the exterior of the library inviting?

Board Relationships

The best libraries have a great director/board partnership. This is a two-way street so be sure that when evaluating the director in this area, you're being fair about your own role in this area and that you are assessing your own performance here as well. Here are some questions to ask:

- How well is the director communicating with the board?
- Is the board kept up-to-date on all pertinent issues?
- Does the director take time to discuss national and statewide trends that may have an impact on local services?
- Do board packets contain meaningful information that helps members conduct their business, understand trends, set policy?

CONCLUSION

These are some broad areas for discussion both in setting goals at the beginning of the year and assessing their accomplishment during the evaluation process. The board should be very careful to stay away from “objectives” or dictating exactly *how* the goals should be achieved. Remember, the director is the one with the professional education and experience. He or she will be evaluated on outcomes. If the methods for obtaining those outcomes (assuming they are safe and legal!) aren’t within the director’s authority, it will be unfair to judge him or her on the performance of those outcomes.

The process of the evaluation differs with every board. A small board might act as a committee of the whole for evaluating the director. Other boards will delegate this responsibility to its executive committee or a special board task force. All board members should have an opportunity to give input, however, even if not directly involved in the performance evaluation itself. This input should include how well goals have been met, how well the library is doing in its performance measures, and how effective each board member believes the director to be.

Using both quantifiable measures of library performance (such as circulation statistics, visits per year, etc.), the perceptions of board members, and the negotiated goal areas from the previous year, the board or its committee has a very good basis for discussion and evaluation.