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WARRENVILLE PUBLIC LIBRARY DISTRICT
Personnel Committee Meeting
Thursday, January 4, 2018, 11:00 a.m.
Location: Library Meeting Room

AGENDA

Visitors are welcome to all meetings of the Board of Trustees and its committees. Anyone who wishes to address the Board during Public Comments must fill out a sign up sheet prior to the start of the meeting. Speakers are limited to three (3) minutes. The Board requests that a group appoint one (1) speaker to present the views of the entire group. Speakers will state name and address before addressing the Board. While the Board appreciates all questions and comments, they will not respond at the meeting, but may choose to do so at a later time.

1. Call to order
2. Roll Call (Trustees DuRocher, Warren)
3. Approval of the agenda (**ACTION**)
Trustees may request to remove any items from the agenda at this time. Discussion only items may also be added to the agenda at this time.
4. Public comments
5. New Business
 - a. Director's Evaluation Process
 - b. Director's Job Description
6. Adjournment (**ACTION**)

PERSONNEL COMMITTEE PACKET – JANUARY 4, 2018

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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 from 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.

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TRUSTEE FACTS FILE

FOURTH EDITION

Robert P. Doyle and Robert N. Knight, editors

Illinois Library Association

Chapter 8

HUMAN RESOURCES



On par with a library's holdings are its human resources. Without appropriately trained staff, library resources would be inaccessible and useless to the community. Trustees on the library board hire and evaluate the library director, who has the major responsibility for library operations and oversight of library staff. The trustees, in turn, set policies to govern human resources issues affecting all staff.

The single most important decision a library board makes is to hire a library director. The success of the library's mission—its programs and services—depends upon the competence and commitment of that one professional more than any other factor.

Obtaining—and keeping—a successful library director must be a top priority for the library board. Along the same lines, the board must ensure that salary and benefits remain competitive, within the library's means. The familiar adage, "you get what you pay for," is as applicable to library management as to any other field requiring advanced education and high professional standards.

The issue of benefits looms especially large these days. With the health insurance industry in a state of high fluidity and under intense cost pressures, providing solid, satisfactory health coverage poses a major challenge to all employers. Moreover, Illinois requires that a retirement plan be provided for full-time municipal employees. Some plans may include some part-time staff as well. In addition, many employees wish to participate in tax deferred compensation programs that can be authorized by the library board as an attractive, virtually no-cost benefit. Library boards must take all these expectations into account when designing benefit plans.

Maintaining open, positive relations with staff also must be a high priority for library boards. Regular performance reviews for the library director, maintaining proper relations with subordinate staff, and handling grievances all fall under this broad umbrella.

Note: The Illinois Open Meeting Law, 5 ILCS 120, mandates that meetings of library boards be open to the public. However, the law does allow for closed meetings for discussion of sensitive topics such as interviewing of candidates, performance evaluations, hearing of grievances, and union negotiations. See the section, "Board Meetings the the Open Meetings Act," in Chapter 3 for the circumstances under which a closed meeting may be called.

Hiring a Library Director

Before any recruiting begins, the library board must draft a comprehensive and accurate job description.

Job Description

The table on page 33 summarizes the type of information that a job description for library director should contain. The job description must be kept current, as it is the basis not only for hiring but also for performance evaluations.

Prioritizing Goals

Before recruiting begins, the board should revisit the long-range, strategic plan for the library. (See Chapter 7, "Planning.") What are the main goals in the plan? What activities do they emphasize? Perhaps a goal calls for expanding inadequate facilities. Or perhaps the library board has embraced a long-term objective of reaching out to a growing and underserved minority in the community.

Make a one-page bullet list to emphasize the major goals that the board has endorsed for future direction. This information will be useful in the recruiting process and in interviews.

Recruiting

For larger libraries, one of the most effective ways to advertise availability of a library director position is to place ads in professional journals such as the *Library Journal* and *American Libraries*. Joblines—online job-search resources—are also available and can be used effectively by libraries of all sizes. Both the ALA and the ILA websites have joblines. Regional library systems also post position vacancies on their websites, which draw a great number of local inquiries.

Joblines

Online Job-Search Resources

- | | |
|-----|--|
| ALA | joblist.ala.org |
| ILA | http://www.ila.org |
| | Select Jobline |

A job ad should include statistics indicating the scope of the job and salary information. A salary figure may be "ballparked" if the board wishes to leave room for negotiation. The ad might also highlight one or two major goals in the board's strategic plan for the library. The following is a sample job ad.

Legal Requirements

Library trustees, like other employers, must comply with state and federal laws that prohibit discrimination in hiring. It is illegal to discriminate on the basis of sex, race, creed, color, religion, age, country of national origin, individual lifestyle, or physical disability. If possible, have a legal advisor preview questions for and written communications to candidates.

Interviewing candidates

Interviewing is an art, as many people intuitively realize. There are library consulting firms that specialize in recruiting and advising institutions on effective and recommended recruitment practices. The process generally follows the steps below.

A library board should delegate interviewing tasks to a committee of the board. The same individuals should participate in all the interviews. Before any interview is conducted, the

committee should draft a list of questions that will be asked of each interviewee. Some of the questions should pertain to the long-range goals that the board has previously identified.

The committee should provide time after each interview for interviewers to make written notes of their impressions.

The committee submits its recommendation to the whole board. Final candidates should meet with the full board, and if possible, with key staff members. When the board has reached consensus on a candidate, references should be checked. The job offer should specify salary and benefits along with the preferred starting date. There may be some flexibility involved, but a deadline should be clear. The other candidates should be notified of the selection only after the chosen candidate has accepted.

Job Title: Library Director

I. Job Responsibilities

Note: Depending on the size of the library, some of the duties may be delegated to the staff, but the responsibility for the successful completion of the work remains with the library director.

- Administrative role: Hire and supervise library staff; implement policies as established by the board; receive and expend funds according to budget; oversee services.
- General advisory role: Advise the board on issues from policymaking to budget preparation; inform the board about developments in the library field.
- Financial role: Prepare draft budget for consideration by the board; participate in presentation of the annual budget to municipal officials; prepare grant applications.
- Reportorial role: Prepare periodic budget reports and reports on circulation statistics or other relevant data; prepare annual report for ultimate submission to state library.
- Collection management role: Oversee selection of all materials; catalogue and process materials according to accepted standards; weed materials in accordance with policies established by the library board; advise the board on collection development issues.
- Facilities management role: Oversee maintenance of grounds and buildings; oversee custodial staff; oversee safety programs and state and federal regulations.
- Public relations role: Interface with community members and groups to develop support for the library; prepare publicity plans and handle media relations.

II. Qualities the Board is Seeking

- Excellent interpersonal skills, with the ability to facilitate discussion and build consensus.
- Excellent communications skills, including public speaking ability.
- Administrative skill, especially the ability to supervise staff and delegate responsibility, fairly and in accordance with board policies and state and federal laws.
- Ability to work well within lines of authority and to accept decisions made by the board.
- Excellent analytical skills. Ability to work with and manipulate statistical data.
- Ability to work with electronic media, including computers and the Internet.
- Ability to handle complaints and controversy with objectivity.
- Ability to plan and handle multiple, competing priorities, and accommodate deadlines.

III. Education and Experience

- Bachelor's degree; Master of Library Science degree preferred.

Performance Evaluations

Evaluation of the library director is an ongoing process, as is evaluation of the library's total

offering of programs and services. The board should conduct such evaluations on at least an annual basis. The first such evaluation for a new director might occur at the end of a probationary period of several months.

The evaluation can be guided by a standard checklist of performance criteria. At least a couple of the performance criteria should be tied to goals in the library's long-range plan. The board and the library director should review the performance criteria at the beginning of the year so the basis of the future review is clear to all parties.

Setting Goals

No performance evaluation is complete without an eye to the future. The trustees and director should identify several objectives, based on goals in the long-range plan, for the director to work on in the coming months. These objectives then become inputs for future performance reviews.

Evaluation of the library director's performance should be based broadly on the following three factors.

Factors for Performance Evaluation

Job Description: Performance of the director as evaluated according to the written job description

Objectives: The director's progress carrying out previously identified objectives, in conjunction with specific long-range goals

Leadership: The success of the library in carrying out service programs, under the leadership of the director

Written Components

For reasons of consistency and legal viability, a formal performance evaluation should generate written records. These records should consist of

- a formal written evaluation by the board, signed by a representative of the board.
- a signed self-assessment submitted by the library director.

The written records are legal protection for both parties in the event that a disagreement involving the director's performance of duties should arise. They also provide a baseline for future performance evaluations.

Records Confidentiality

Human resources records require sensitive handling. Personal details of an employee's record are private and confidential in nature. Medical information is especially sensitive and should be kept separately from general personnel records. Management and use of human resources records are governed by the Personnel Record Review Act: 820 ILCS 40. For a sample personnel records request form, go to the Illinois State Library Administrative Ready Reference, <http://www.webjunction.org/partners/Illinois/il-topics/readyref.html>: select **Policy Model**. Then select **Personnel Policies**; select **Model Library Personnel Record Policy**.

Terminating Employment

For any number of reasons, the board and/or the director may decide that it is time for the director to go. Though the director may have been hired under contract, that contract may not be legally enforceable. If the director wants to resign, it is probably best for the board to accept that decision, even if there was a written or oral agreement about a longer period of employment.

If the board faces the delicate task of terminating the director's employment, it is highly advisable for the board to consult a legal advisor before firing a director. Illinois is an "at will"

"employment" state, and most directors serve at the pleasure of the board. To avoid the possibility of litigation, a legal advisor will advise the board whether to document cause for termination of an employee or terminate the director "at will."

Whatever the cause of the parting, the board should conduct an exit interview with the director. A frank and open discussion of differences can identify problem areas that the board may want to remedy in future director relationships, or at the least, pitfalls to avoid in the next round of hiring.

Trustee Relationships with Subordinate Staff

The library board works directly with the library director in the administration of the library, and the director is directly answerable to the board. However, the situation with subordinate staff is quite different. These staff members will have been hired by the library director (past or present) and report directly to her or him. Therefore it is important that trustees avoid interference in the lines of authority between director and subordinate staff.

Occasionally, an aggrieved employee may approach a trustee with a complaint. The proper response on the trustee's part is to direct the employee to take up the problem with the library director.

The board should have a clearcut, written policy for handling staff grievances. If the problem cannot be solved at the director's level, then it may have to come before the board—but only according to an established, written policy.

For a sample grievance policy, go to the Illinois State Library Administrative Ready Reference: <http://www.webjunction.org/partners/illinois/il-topics/readyref.html>: select Policy Model. Then select Personnel Policies; select Grievance Procedure Policy.

Salary and Benefits

Determining appropriate salary levels involves two hard realities of economics: available resources and supply-and-demand competition among the available pool of personnel. To attract good people, the board of trustees should offer a competitive salary for the range of duties each position entails. The board sets the compensation structures and the level of each job with a minimum and maximum salary for the position; the director administers the salary and benefit program for the other employees, according to the board's policies. The board confirms new hires and salaries.

The Illinois Library Association advocates fair compensation for library employees within these guidelines:

- A qualified, entry-level librarian should be compensated at no less than the same rate as an entry-level public school teacher with a master's degree, with adjustment to reflect a librarian's 12-month (rather than teacher's 10-month) work year.
- All other library staff should be compensated at levels that are competitive with salaries paid for equivalent positions in other public agencies within the same or approximately the same service area.

For additional help in setting appropriate salary for staff positions:

- confer with other comparable libraries in your library system or region and other local governmental agencies.
- seek input from other libraries of similar size, from school districts, or from the municipality.

Benefits are becoming an ever bigger part of the total rewards package. The cost of health insurance continues to rise at rates far ahead of annual inflation. If possible, the board should consult with a benefits specialist to find the best, most cost-effective combination of benefits. Some certified public accountants (CPA's) now offer benefits consulting as part of their ser-

vices. Also seek options to join cooperatives to get good benefits at a more competitive price.

Human Resources Policy Manual

A necessary tool for employer and employees alike is a human resources policy manual. Such a manual might be prepared and maintained by a board committee in close consultation with the library director.

Document salary grades, benefits, paid holidays, vacation, and any other information relevant to staff in the manual. Distribute the manual to all staff members and have them sign a statement indicating that they received a copy. The manual is a guide to the policies of the library. Do not consider it or imply that it is a contract.

Union Negotiations

Public employees in Illinois have the right to join unions to bargain collectively for salary, benefits, and working conditions. In libraries in which staff members are unionized, it is the board's responsibility to negotiate terms of employment with union representatives. The library director should, of course, have input to these negotiations. In the final event, however, it is the board that will have to reach agreement in collective bargaining.

It is critically important that trustees adhere to state and federal laws governing labor relations when negotiating with union representatives. It is equally important that the board observe legally proper conduct during union organization and election activities.

It is highly recommended that the board may consult with an attorney with expertise in labor relations. The following resources may also be useful.

National Labor Relations Board: <http://www.nlrb.gov/>

American Arbitration Association: <http://www.adr.org>

Resources

Baldwin, David A. *The Library Compensation Handbook: A Guide for Administrators, Librarians and Staff*. Westport, Conn.: Libraries Unlimited, 2003.

Cole, Jack and Suzanne Mahmoodi. *Selecting a Library Director: A Workbook for Members of a Selection Committee*, revised 1998. St. Paul, Minn.: Friends of the Library Development and Services, the Minnesota State Library Agency, a unit of the Minnesota Department of Education, 1998.

Cravey, Pamela. *Protecting Library Staff, Users, Collections and Facilities: A How-to-Do-It Manual*. New York: Neal-Schuman Publishers, 2001.

Evans, G. Edward. *Performance Management and Appraisal: A How-To-Do-it Manual for Trustees and Librarians*. New York: Neal-Schuman Publishers, 2004.

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The Successful Library Trustee Handbook

Second Edition

Mary Y. Moore

American Library Association
Chicago 2010

authorize funding for training, intervention, or incentives such as Customer Service Employee of the Month. The most important thing to remember is that you don't want your library to go the way of the Automat!

EVALUATING THE DIRECTOR

As a trustee of a governing board, you are responsible for hiring and, if necessary, firing the library director. The library director is an employee of the board. There are cases in which, as a member of an advisory board, the library director is an employee of the city, but you may have a good deal to say about his or her employment nonetheless. There are also cases where the library director may be considered an employee of the funding authority, but the board has governing powers. No matter what the employment structure is, you will be asked to evaluate the library director's performance.

Why Is This Evaluation So Important?

There are good reasons for evaluating your library director on a regular basis. Periodic evaluation

- establishes a line of communication between the director and the board
- ensures that the goals and strategies of the strategic plan are being met
- identifies concerns of the board or the director
- demonstrates sound leadership, accountability, and governance on the part of the board
- provides a sound basis for merit raises or corrective action

How Is This Done?

Good evaluation methodology can consist of both subjective and objective measures. However, keep these three caveats in mind:

1. The purpose of any performance evaluation is to encourage strengths and discuss areas for improvement.
2. There should be no surprises in a formal performance evaluation.
3. The person being evaluated should understand the basis of the evaluation.

The first step is to sit down with the other board members and the library director and determine the criteria on which the evaluation will be based, the format, and the process by which it is to be carried out. If you are a member of an advisory board and the library director is an employee of a city or county, the evaluation method will probably already be in place. It will be developed by the human resources department of whoever formally employs the director. You, as an advisory board member, may be asked to provide input. If this is not happening, you and other members of the board should ask to be included.

There are three types of criteria used for performance evaluations: library goals, the job description, and behavioral traits. I recommend using all three as long as there is a rating system on which to base an objective score. And if a low rating is given, suggestions for improvement must be provided. Board members need to agree upon the definitions of the ratings so that they are all on the same page.

Using Library Goals as a Factor

Library goals are probably the easiest yardstick to use in evaluating the director. The question could be: Are the goals as set forth in the strategic plan being met according to the time line stipulated for them? (1—no progress; 2—some progress; 3—time line being met in majority of goals; 4—time line being met in all goals; 5—all goals achieved) Or the goals can be taken individually and achievement can be rated on each one.

To determine the ongoing achievement of goals, board members should be receiving regular monthly reports from the director. Those reports need to include the progress made on the goals set forth in the current strategic plan.

Using the Job Description as a Factor

There are some constants in job descriptions for library directors. They are such things as "prepares and manages the budget in a professional manner," "is aware of current library practices," "maintains good relationships with funding authorities," "is familiar with and utilizes technology wisely," "works closely with the board of trustees in pursuing a successful library program," "illustrates sound staff development practices," etc. All of these aspects of the library director's job description can be used as criteria in a performance evaluation. You hired the library director based on these performance expectations and you have every right to be assured that they are being carried out.

Following are specific criteria that could be included in a performance evaluation based on the director's job description:

Monthly budget reports are completed in a timely manner.

Innovative library practices are considered on a regular basis.

The collection is up to date and well used.

Relationships between staff and management are positive.

Library director meets regularly with members of the funding authority.

Staff development is pursued vigorously.

Board decisions are implemented in a timely fashion.

These statements would then be rated and recommendations for improvement would be made.

Using Behavioral Characteristics as a Factor

Using behavioral characteristics as a factor in a performance evaluation can be tricky but also very helpful. The normal behavioral characteristics considered would be such things as decision-making ability, communication skills, cooperation, dependability, creativity, leadership skills, risk taking, initiative, listening skills, etc. Sometimes these traits are listed in the job description and sometimes they are just expectations of the board. However, if the board members have not communicated these expectations to the director, they can't be included in a performance evaluation. Be very careful when including

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subjective factors in your evaluation; when you do include them, make sure the traits are being evaluated on the basis of firsthand observation.

Who Performs the Evaluation and Who Has Input?

The people taking part in the formal evaluation process differ from library to library. Advisory board members may have input, but only sometimes do they get to take part in the performance appraisal interview. The interview is usually handled by the director of the human resources department in these cases. Some governing boards may decide that everyone wants to be part of the process. Others may decide that only the chair of the board and one other member will perform the evaluation with input from the entire board. Whatever the process, it is important that the situation be businesslike but not intimidating. Performance evaluations should be an ongoing part of a person's job, with the intent of helping that person to develop.

Board members are not the only ones who should have a chance to voice their opinions on the library director's performance. The director is also accountable to staff members, elected officials, people he or she works with in the city or county, members of the general public, Friends of the Library, and others. Input from a representative sample of those folks is very helpful, bearing in mind that the process of getting their opinions must be the same as that for gathering board members' input. It may seem easier just to ask someone what he thinks of the director, but the answer to an open-ended inquiry may have nothing to do with the director's performance. The fairest approach is to ask these people to respond to the evaluative instrument you have developed.

The Performance Appraisal Interview

Once the board chair receives all the input, you are ready to write up the formal evaluation. Allow enough space in the written document for notes on improvements that need to be made and deadlines for completion. Distribute copies of the evaluation to the library director and all board members.

The evaluation interview should take place at a regularly scheduled board meeting. Since personnel matters are not usually discussed in open sessions, you will need to conduct the interview in an executive session before or after the business meeting. Don't forget to check your Open Public Meetings Act to make sure you are performing the interview within the laws of your state.

When going through the evaluation, try to provide specific examples wherever possible to clarify your expectations of the director. Encourage free discussion so that all the issues can be explored thoroughly. Honesty and candor should be the rules of the interview, and there should be no interruptions. When improvement is called for, ask the library director what he or she expects to do about the problem and when it will be corrected. Include that information in the written notes of the interview. The library director should then be held to account by the board. This is referred to as corrective action. It is also important to provide praise and support when it is merited.

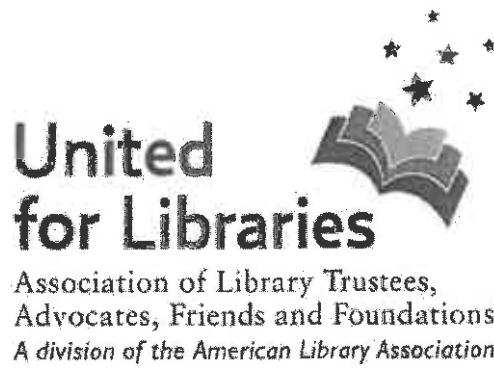
This is not an easy process, but evaluating the library director is one of the most important things that you can do for the success of the library and for the director's professional development.

EVALUATING YOURSELVES

You probably thought you were through with all the evaluating you have to do. But is it fair not to evaluate yourselves? Aren't you interested in seeing how well you are doing as a board? You may be a wonderful trustee in a group with other wonderful trustees, but how well do you do together? Finding out isn't all that hard. It's what you do about it that counts.

How Is It Done?

There are two main ways to evaluate the board. You can hire someone from the outside to do it, or you can do it yourself as a board. Most board members who are smart enough to collectively evaluate themselves at all think it is easier and less expensive to self-evaluate. But there are pitfalls in this method that you need to be aware of before using just any board self-evaluation checklist.



**United
for Libraries**

Association of Library Trustees,
Advocates, Friends and Foundations
A division of the American Library Association

***A Library Board's
Practical Guide to
Evaluating the Library Director***

Sally G. Reed, Executive Director, United for Libraries

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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 goals 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.

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RESOURCE: “Evaluating the Library Director” in Short Takes for Trustees

A short video from ALA’s United for Libraries (Association of Library Trustees, Advocates, Friends and Foundations)

From (Reaching Across Illinois Library System)

Our member libraries have access to these trustee training resources from United for Libraries:

Trustee Academy is a series of online courses to help trustees become exceptionally proficient in their roles on behalf of their libraries. All of the online courses are taught by a professional in the field.

Short Takes for Trustees is a series of 10 short videos (8-10 minutes each) that can be shown during Trustee meetings to stimulate discussion about the important role that Trustees play in the governance of their libraries.

Access Trustee Academy and Short Takes for Trustees at:

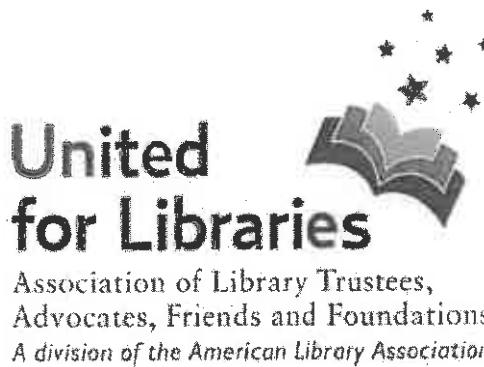
<http://www.ala.org/united/training/rails>

Your login for Trustee Academy and Short Takes for Trustees is:

Login: short-takes

Password: rails2965

Resource guide and sample forms are attached



Short Takes for Trustees

Evaluating the Library Director

Resource Guide

© United for Libraries: The Association of Library Trustees, Advocates, Friends and Foundations. This resource guide is for use by libraries that have purchased access to the Short Takes for Trustees video series, or by libraries included as part of a region or statewide purchase of the Short Takes for Trustees video series. No portion of this resource guide may be copied or distributed.

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November 2014

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Evaluating the Library Director

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.

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 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:

- 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.

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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. 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. 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?

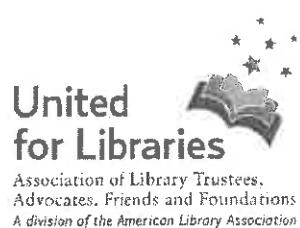
- Overall quality of library services. How innovative are your library services? Do you get feedback from the public about the quality and scope of the collection? Are your services highly used? What kind of media attention do library services get? Do the services delivered meet or attempt to meet the 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 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. 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? 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. 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?¹

¹ Reed, Sally Gardner, and Jillian Kalonick. *The Complete Library Trustee Handbook*. New York: Neal-Schuman, 2010.

tip sheet #6

Tools for Trustees



EVALUATING THE LIBRARY DIRECTOR

One of the most important roles the Board of Trustees has is to hire the very best library director possible, and then work with him or her to ensure that goals for service are consistently and exceptionally well met. This means that evaluation of the director is critical. Without a formal evaluation process, there is no concrete way for the director to know if he or she is meeting or exceeding expectations. Similarly, without the formal evaluation process, the board may be letting troublesome issues become worse, and the board also loses an important opportunity to put their appreciation of performance in writing.

At the beginning of each fiscal year, the board and director should set goals for performance and areas for evaluation. The performance goals should be achievable and should be determined in consultation with the director.

Areas to be addressed in setting goals should include:

- Staff relationships and management.
- Board relationship.
- Accomplishment of objectives set forth in the library's strategic plan.
- Financial responsibility and oversight.
- Overall quality of library services.
- Community relations.
- Facilities management.

Within each of these areas, determine how success will be measured. This is important because it will eliminate any hard feelings if the board feels the director has fallen short, but the director feels he or she is right on target. By setting the goals and performance measures at the beginning of the year, you will have inserted objective standards into the process, making the evaluation itself more meaningful and less personal.

The evaluation process at the end of the fiscal year should be a negotiated process. Even if you've agreed that circulation will increase 5%, for example, there should be an opportunity to discuss any unforeseen factors that made meeting this target impossible. Use this opportunity to coach the director in areas that need improvement and to praise the director for successes.

The end of the year evaluation process is the perfect time to set new goals for the coming year based on what's been accomplished, and what goals can make the library even better in the coming year.

continued on reverse

Important Note: While it is sometimes difficult to give constructive criticism, it's important to let the director know during the year if you have any performance concerns. It's not good for the library and not fair to the director if you see areas of concern but wait until the formal evaluation to address them.

In the end, the best thing you can do to ensure that you have a high performing director is to provide constant and constructive feedback on how the library is doing, and to engage in a formal evaluation process at the end of each year.

For more detailed information on director evaluations, see *The Complete Library Trustee Handbook* by Sally Gardner Reed and Jillian Kalonick (Neal-Shuman, 2009). This book is available at a significant discount to all United for Libraries members. For more information, visit http://www.ala.org/united/products_services/publications.

updated 5/13

United for Libraries

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www.ala.org/united

Sample Evaluation Forms

United for Libraries has provided a variety of organizational tools on our website at <http://www.ala.org/united/trustees/orgtools> to help your Board of Trustees be more effective. Included are links to four sample evaluation forms:

- Board of Trustees of the Hatfield (Mass.) Public Library Director Evaluation
- Rochester Hills Public Library Board Evaluation of the Library Director
- Mid-Hudson Library Director Evaluation Part I
- Mid-Hudson Library Director Evaluation Part II

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**Hatfield Public Library
Board of Trustees
39 Main Street
Hatfield, MA 01039**

Library Director Evaluation

The Hatfield Public Library Board of Trustees will conduct a formal, written evaluation of the Library Director at the end of each fiscal year.

Purposes of the Performance Evaluation

- To provide the director with clear understanding of the board's expectations.
- To ensure the director and the board are aware of how well the expectations are being met.
- To serve as a formal vehicle of primary communication between the board and director.
- To identify the board's actual concerns so that appropriate action can be taken.
- To demonstrate sound management practices and accountability to municipal officials and the community.

Expectations and Evaluation

Directors are held accountable to many varied and sometimes conflicting constituencies. The board and the director must recognize these groups and acknowledge the relationship with each one:

- The general public
- Elected officials and the appointed governing officer who supervises other municipal departments
- The library staff members who have diverse personal expectations for their director
- Public pressure groups who exert pressure on the director to respond to their concerns
- Friends of the Library groups
- Individual members of the board of trustees who have personal priorities for the library and the director.

Good communication, public relations, a written plan and clear policies will all help the board and director to deal with any conflicting expectations. The evaluation method and process can be designed to include input from all these groups, but the final responsibility rests with the board.

Definition of Rating Terms:

5: Outstanding: The Director's performance is exceptional in comparison to expectations.

4: Highly Effective: The Director always meets and frequently exceeds performance expectations.

3: Effective: The Director consistently meets performance expectations and performs in a professional and competent manner.

2: Needs Improvement: The Director meets only minimally acceptable levels of performance; the Director requires extra direction from the Library Trustees.

1: Unacceptable/Needs Substantial Improvement: The Director does not meet performance expectations, even at a minimally acceptable level; the Director requires significant extra direction and/or constant supervision from the Library Trustees. Need for immediate and significant improvement.

0: N/A: Not applicable to this situation.

Please rate the Library Director in the following areas using the above scale 5 (highest) to 1 (lowest) or N/A (Not Applicable) where appropriate:

1. Preparing and Managing the Budget

Necessary work is completed in a timely manner prior to present to the Board.

The budget covers all necessary expenses.

Funds are allocated or reserved for unanticipated contingencies.

Funds are effectively allocated.

Mid-course corrections are minimized.

ARIS (August) and State Aid (October) reports are accurate and complete and submitted to the MBLC in a timely manner.

Other funding sources are explored and applied for as appropriate.

| Comments |
|----------|
| |

2. Managing the Staff

Positive management/staff relations are maintained.

Fair and equitable policies are proposed for board adoption and then fairly administered.

When grievances are filed they are justified.

| Comments |
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3. Professional Awareness

Innovative methods of service delivery and technical processes are studied thoroughly.

Innovations are implemented only after they fit the needs of the institution and are proven to be cost effective.

The director maintains an adequate knowledge of current library science practices.

Staff are encouraged to maintain an awareness of technological advances in the profession.

| Comments |
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4. Collection development

Collection development policy is up-to-date.

Selection and weeding are policies systematically implemented.

Director determine's user needs/wants and translates these into appropriate acquisitions and services.

Selection criteria have been established to enable the library to react systematically to changes in the budget.

The collection is current and reflects present community needs and interests.

Comments

5. Implementation of Board Decisions

Board decisions are implemented on a timely basis.

Director displays initiative.

Director is objective in making the necessary decisions.

Director is consistent in decisions that affect the staff and/or public.

Director fully and enthusiastically supports board decisions.

Director sets an example for the staff through professional conduct, high principles, and a business-like approach.

Comments

6. Use of the Library

Effectively communicates library services to the public.

A proper and realistic balance is maintained between promotion of services and budget constraints.

Circulation trends and in-house use are adequately analyzed.

Information about new services that are effectively communicated to the public.

| Comments |
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7. Development of Staff

Potential managers are identified, encouraged to develop and assisted in their pursuit of career goals.

Internal candidates for promotion are competitive with outside candidates for management positions.

Director adequately justifies the need for staff development funds, actively campaigns for such funds, and adequately account for the use of such funds.

Cross-training is utilized to provide adequate service to the public.

| Comments |
|----------|
| |

8. Utilization of Staff

Staff are aware of the separation of professional and clerical tasks and responsibilities.

Peak service hours have been identified and staff deployed accordingly.

Functions are analyzed periodically with the objective of combining, eliminating and/or creating new positions.

| Comments |
|----------|
| |

9. Community Development

- Director is active in the community.
- The Director is "visible" to large segments of the population.
- The Director is available for speaking engagements in the community

Comments

10. Activity in Professional Organizations

- Director participates and holds office in professional organizations as appropriate.

Comments

11. Policy Recommendations to Board

- Adequate staff research is completed prior to presentation to the board.
- Policy recommendations are necessary and appropriate to the efficient operation of the library.
- Trustees are informed of new developments and important news reported in library correspondence and literature to provide them with the necessary background to make informed policy decisions.

Comments

12. Friends of The Library

- Director actively promotes the maintenance of a Friends group.
- Director and staff provide adequate support to the Friends organization.

- Director delineates and/or helps define the role of the Friends group.
- Friends group has adequate explanation of its role in relationship to the role of the board.

| Comments |
|----------|
| |

13. Maintenance and Construction of Physical Plants

- Buildings and grounds are adequately maintained within the imposed budgetary constraints.
- Director has an ongoing program that provides adequate information on the need for new and/or remodeled facilities.
- New and/or remodeled facilities are functionally appropriate and aesthetically pleasing.
- New and/or remodeled facilities are constructed within budget allocations.

| Comments |
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| |

14. Establishing Priorities

- Director's recommended priorities are in concert with the library's plan as defined by the board.
- Priorities appropriately reflect community needs.
- Priorities reflect advanced planning.
- Director's accomplishments reflect and relate to the short and long range plans.
- Plans are updated on a continuous basis to reflect changing circumstances.
- Director provides adequate information to the board on the implementation and revision of short and long term planning.

| Comments |
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| |

15. Staff Selection

- Staff selection is accomplished at appropriate supervisory levels and with adequate use of staff resources.
- Adequate emphasis is placed on Equal Opportunity Employment/Affirmative Action.
- Selection process is designed to insure the selection of the best person for the job.

| Comments |
|----------|
| |

Approved by the Board of Trustees on June 1, 2011.

Dodie Gaudet, Chair

Marsha Humphrey

Nancy Little, Recording Secretary

Wolfe, Elizabeth Marus, ed.; MBLC Public Library Advisory Unit. "Massachusetts Public Library Trustees Handbook". Boston, MA: Commonwealth of Massachusetts Board of Library Commissioners. 2000. Print.

EVALUATION OF LIBRARY DIRECTOR
Rochester Hills Public Library
September 2010

Use the numerical scale below to evaluate the performance of the Library Director this past year. Select the number that best indicates your perception of the Director's performance for each of the criteria listed.

POINTS

| | |
|--------------------|---|
| 5 - Outstanding | far exceeding performance criteria |
| 4 - Above average | exceeds normal expectations |
| 3 - Average | generally meets expectations |
| 2 - Weak | erratic performance, falls short of normal expectations, requires remedial action |
| 1 - Unsatisfactory | unacceptable performance, which must receive immediate attention |

Rating

A. Relationships with Board

- _____ 1. Keeps the Board informed on issues, needs and operations of library
- _____ 2. Offers professional advice to the Board on items requiring Board action, with appropriate recommendations based on thorough study and analysis.
- _____ 3. Supports and executes Board policy and intent to public and staff.
- _____ 4. Seeks and accepts constructive criticism of work.
- _____ 5. Seriously considers, and/or acts on individual Board member's suggestions.

Comments

B. Goals and Objectives

- _____ 6. Provides leadership in developing long and short term goals to accomplish mission of library.
- _____ 7. Keeps the Board updated on implementation of library goals and objectives.

Comments

C. Community and Professional Relationships

- _____ 8. Gains respect and support of the total community on the operation of library.
- _____ 9. Maintains an effective press and media campaign.
- _____ 10. Keeps abreast of local, state and national library issues.
- _____ 11. Participates in local, state and national library associations.

Comments

D. Staff and Personnel Relationships

- _____
- _____
- _____
- _____
- _____
- 12. Develops and executes sound personnel procedures and practices.
- 13. Develops good staff morale and loyalty to the organization.
- 14. Delegates authority to members appropriate to the positions each holds.
- 15. Recruits and assigns the best available personnel in terms of their competencies.
- 16. Evaluates performance of staff members, giving commendation for good work as well as constructive suggestions for improvement.

Comments

E. Business and Finance

- _____
- _____
- _____
- _____
- 17. Keeps informed on needs of the library -- plant, facilities, equipment and supplies.
- 18. Evaluates financial needs and makes recommendations for adequate financing.
- 19. Determines that funds are wisely spent and within budget limitations.
- 20. Supervises operations, insisting on competent and efficient performance.

Comments

F. Personal Qualities

- _____
- 21. Maintains high standards of ethics, honesty and integrity in all professional matters.

Comments

Comment and Discussion

What are the three major strengths of the Director?

Are there limitations in the Director's performance?

In the past year, what difficult issues have faced the library and how did the Director bring them to resolution?

What should be the organizational goals and/or personal development goals for the Director for the coming year?

Overall Performance Rating

Based upon the preceding comments and evaluations, check the term which best describes the Director's overall performance for the evaluation period. This may not necessarily be an "average" of your criteria ratings, since some criteria are more important than others. Use the back of this page (or make another one) for further comments and recommendations.

- | | |
|-------|----------------|
| _____ | Outstanding |
| _____ | Above average |
| _____ | Average |
| _____ | Weak |
| _____ | Unsatisfactory |

Thank you for your participation.

The 2010 Director's Evaluation Committee – Madge, Ann and Doug

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FOR YEARS library boards have asked us how they should evaluate the library director. We have responded by offering links on our web site and tools that we considered adequate, but we have never found a method that is superior. Now, after researching (using the excellent tools available through our HOMEACCESS databases), we have synthesized ideas and developed our own model. We think you will find it an effective process for improving the health of your library.

ACROSS THE

BOARD

EVALUATING THE STATE OF THE LIBRARY ■ PART 1: DIRECTOR EVALUATION

WHAT IS BEING EVALUATED? The board-director relationship is not a manager-employee relationship. It is a partnership for the purpose of running a highly important community organization: a public library. Rather than evaluating the director, 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.

THE PROCESS. Areas to be evaluated should provide a comprehensive view of the library's operations. We have identified five areas, you may come up with others if you have specific local conditions such as a building project:

- Customer Service and Community Relations
- Organizational Growth
- Administration and Human Resource Management
- Financial Management and Legal Compliance
- Board of Trustee relationship

Use a form to assess the state of your library. The form should be based on the five areas above. Structure the form more tightly by adding questions under each area. For example, in the area of *Customer Service and Community Relations*:

| | |
|---|---------|
| Level of patron satisfaction | E S N U |
| Customer service received by patrons | E S N U |
| Consistent application of policies that affect the public | E S N U |
| Comments: | |

(E = excellent; S = satisfactory; N = needs improvement; U = unknown)

View our suggested evaluation form that encompasses all five areas on the *Trustee Resources* section of the MHLS web site: <http://midhudson.org/trustee/main.htm>.

Each member of the board should individually respond to the form. In responding to the form, board members could refer to the plan of service, board minutes, usage statistics, program results or other information sources from the year. Once all forms have been submitted, summarize the results. A sample summation form is available on the MHLS site. This will provide the board with a picture of how the organization is functioning and will shape the evaluation process. If the summation shows:

- the organization is functioning well, your evaluation process should focus on motivating and supporting the director.
- everything is basically OK, but some specific things need to be addressed, then clarify the board's expectations through the evaluation process, and also offer support and motivation.
- the organization is functioning unsatisfactorily, identify the issues, determine what is needed to get the organization on track, and create a timeline for progress reports.

Once the board has developed some agreement on the functioning of the organization, they should meet with the director, either as a full board in executive session, a committee, or one or two board members. The discussion should use the summation as an outline. Take this opportunity to discuss areas of weakness within the organization, then, with the director, develop goals to improve the organization. Also use this opportunity to tell your director if they are doing well in areas, no one likes their successes to go unnoticed. The summation, with the issues to be addressed written in, should be signed by both the board president and the director.

Some might object that this model does not evaluate the director, but earlier models tend to separate the performance of the organization from the performance of the director. You could conceivably have situations where the library is failing, but the director is receiving a good evaluation. This model ties the responsibility for the performance of the organization to the director.

COMPARISON OF MODELS

| TRADITIONAL | MHLS |
|--|--|
| Focus on Director | Focus on Library |
| Assumes Hierarchical Manager-Employee Relationship | Assumes Governance-Executive Partnership |
| Personality Driven | Performance Driven |
| Focus on what is wrong | Focus on Success |
| Develops methods for improving Director | Develops methods for improving Library |
| Corrects past problems | Builds future development |

WORST CASE SCENARIO: DISMISSING THE DIRECTOR. Many boards feel the only time they need to evaluate the director is when things are going badly. By then it is too late. The director evaluation should be an annual event and the best and easiest time to begin this schedule is when things are going well.

"Ideally, evaluations are positive, developmental processes that include praise and constructive guidance. The board should review the library plan, job descriptions, goals and objectives and the annual report submitted by the director, documenting accomplishments of the library. Other relevant information should be obtained as needed."

—Massachusetts Public Library Trustees Handbook

In the event that the library is not functioning well and the board feels the need to change directors, the evaluation process, although possibly the starting point, is not the best method for removing the director.

New York State is an "employment-at-will" state which means, barring a contract, the board can remove the director without cause. If you have an employment contract with the director, or the director is under Civil Service, you need to show cause. In any case to remove a director you need to build a clear paper trail documenting how you have communicated your dissatisfaction to the director, provided opportunities for improvement, and provided a warning notice if improvement has not happened. This process needs to be done through written communications with the director. Addressing this issue only during an annual evaluation could draw out the process by three years or more.

Governing an effective library is a complex job that takes hard work and dedication. Make your efforts count by regularly evaluating the state of the organization, this will help to make your job as a trustee more fulfilling and create the best possible library for your community.

 Stay tuned for PART 2 of "Evaluating the State of the Library" when we will discuss best practices for evaluating your board.

TRUSTEE INPUT WANTED for Next MHLS Five-Year Plan of Service

MHLS IS ASKING FOR TRUSTEE INPUT for our next five-year Plan of Service. We have scheduled a series of focus groups to facilitate this portion of the planning process. Issues to be discussed include:

- Current library needs
- What MHLS services you use
- How do you define quality library service
- What your library needs for the future

We hope to hear from all types of libraries, all sizes of libraries and libraries from each county. Staff, trustees and Friends should register at <http://www.midhudson.org/evenue/d/lib/eventcalendar.asp> if planning to attend or call 845.471.6060 x46.

If you cannot attend the meeting closest to your library, you are welcome to attend another scheduled session in your area of interest. If that isn't possible, please call or e-mail your comments. This is a great opportunity to help shape the future of MHLS, and we hope you can find the time to be part of this process.

All meetings will be held from 6:30 P.M. to 8:00 P.M.; dinner will be served.

Below is the schedule for the MHLS five-county region:

| | |
|------------|--|
| ■ MONDAY | GREENE COUNTY TRUSTEES |
| MARCH 6 | Catskill Public Library, 1 Franklin Street, Catskill |
| ■ TUESDAY | ULSTER COUNTY TRUSTEES |
| MARCH 7 | Kingston Library, 55 Franklin Street, Kingston |
| ■ THURSDAY | PUTNAM COUNTY TRUSTEES |
| MARCH 16 | Mahopac Library, 668 Route 6, Mahopac |
| ■ MONDAY | COLUMBIA COUNTY TRUSTEES |
| MARCH 20 | Kinderhook Library, 18 Hudson Street, Kinderhook |
| ■ THURSDAY | DUTCHESS COUNTY TRUSTEES |
| MARCH 23 | Starr Library, 68 West Market Street, Rhinebeck |

LIBRARY LOBBY DAY IS MARCH 14TH. Join MHLS area library supporters in making the case for better library funding. For more information, visit MHLS Advocacy Central at <http://midhudson.org/funding/advocacy/main.htm> or contact Rebekkah Smith Aldrich at 845.471.6060 x39 or rsmith@midhudson.org.

NEW CONSULTATIONS AVAILABLE FOR TRUSTEES

FOCUS GROUP FACILITATION. Learning what your community wants from your library is a vital component to the planning process. If you would like to do a focus group MHLS staff can help.

CONTACT: Josh Cohen jcohen@midhudson.org | 845.471.6060 x17

YOUR LIBRARY'S MESSAGE. Communicating effectively with your community is essential. Learn how to create the right message for the right audience along with techniques for getting your message out. Time: 1.5 hours.

CONTACT: Rebekkah Smith Aldrich rsmith@midhudson.org | 845.471.6060 x39

For the full menu of consultations available to your board, visit the Trustee Resources section of the MHLS web site at <http://midhudson.org/trustees/main.htm> and look under "Orientation for New Trustees" where you will find MHLS Consultations. Offerings include *sustainable funding, long-range planning, roles and responsibilities of trustees, policies and personnel*.

NEW TRUSTEE HANDBOOK AVAILABLE

The 2005 edition of the Handbook for Public Library Trustees of New York State is now available. Visit the Trustee Resources section of the MHLS web site to access an online version of the handbook, or contact Rebekkah Smith Aldrich at 845.471.6060 x39 or rsmith@midhudson.org to obtain a print copy.

SPRING 2006: TRUSTEE EDUCATION SCHEDULE

TRUSTEE ESSENTIALS. Essential sessions are designed to provide public library trustees with information about the following areas: *Background & Structure of Libraries in New York State, Roles & Functions of a Board, Running Effective Meetings*. Essential sessions will be held on:

- Monday, April 3 at the Starr Library, Rhinebeck, 6-8 p.m.
- Saturday, April 22 at the Catskill Library, 10 a.m.-12 p.m.
- Monday, April 24 at the Mahopac Library, 6-8 p.m.

ADVANCED TRUSTEE EDUCATION: *Building Community Support for your Library*

- WEDNESDAY, MAY 10 Mid-Hudson Library System Auditorium, 6-8 p.m.
- SATURDAY, MAY 20 Hudson Area Association Library, 10 a.m.-12 p.m.

ADVOCACY NOW
Tell Your Stories in Albany on March 14th

BOARD

ACROSS THE

A Mid-Hudson Library System Publication for Trustees

103 Market Street • Poughkeepsie, NY 12601

CHANGE SERVICE REQUESTED

Sample Director Evaluation Form for Trustees

Executive Director's Annual Evaluation

Date:

Form Instructions:

- 1) each board member should individually respond to this form.
- 2) In responding to the form, board members could refer to the plan of service, board minutes, usage statistics, program results or other information sources from the year.
- 3) Submit this form to the Board President for inclusion in the Summation Form that will be used during the face-to-face appointment with the director.

Scale: E = excellent S = satisfactory N = needs improvement U = unknown

Area of Organizational Health

Rating

Customer Service & Community Relations

| | | | | |
|--|---|---|---|---|
| • Level of patron satisfaction | E | S | N | U |
| • Customer service received by patrons | E | S | N | U |
| • Consistent application of policies that affect the public | E | S | N | U |
| • Services are communicated to the public effectively | E | S | N | U |
| • Working relationships and cooperative arrangements with government officials, community groups and organizations | E | S | N | U |
| • Awareness of community needs | E | S | N | U |
| • Mechanisms are in place to hear from patrons and the community-at-large | E | S | N | U |
| • Library is being marketed to the community | E | S | N | U |

Comments:

CS & CR totals: E ____ S ____ N ____ U ____

Organizational Growth

| | | | | |
|---|---|---|---|---|
| • The library is making progress on its long-range plan (LRP) | E | S | N | U |
| • Services to meet the goals and objectives of the LRP are carried out with staff and trustee involvement | E | S | N | U |
| • Goals and objectives are evaluated regularly | E | S | N | U |
| • Creativity and initiative are demonstrated in creating new services/programs | E | S | N | U |
| • Collection is responsive to community needs | E | S | N | U |
| • The library is responsive to changes in the community | E | S | N | U |
| • Staff are aware of library's long-range plan, policies and activities | E | S | N | U |
| • There is a working knowledge of significant developments and trends in the field | E | S | N | U |
| • Building and grounds are kept up and needed repairs and maintenance are done on a timely basis | E | S | N | U |

Comments:

OG totals: E ____ S ____ N ____ U ____

Administration & Human Resource Management

- | | | | | |
|---|---|---|---|---|
| • Work is effectively assigned, appropriate levels of freedom and authority are delegated | E | S | N | U |
| • Job descriptions are developed; regular performance evaluations are held and documented | E | S | N | U |
| • Personnel policies and state and federal regulations on workplaces and employment are effectively implemented | E | S | N | U |
| • Policies and procedures are in place to maximize volunteer involvement | E | S | N | U |
| • Staff development and education is encouraged; | E | S | N | U |
| • Staff understand how their role at the library relates to the mission | E | S | N | U |
| • Library climate attracts, keeps, and motivates a diverse staff of top quality people | E | S | N | U |

Comments:

A&HRM totals: E ____ S ____ N ____ U ____

Financial Management / Legal Compliance / Fundraising

- | | | | | |
|---|---|---|---|---|
| • Adequate control and accounting of all funds takes place; library uses sound financial practices | E | S | N | U |
| • Budget is prepared with input from staff and trustees; the library operates within budget guidelines | E | S | N | U |
| • Official records and documents are maintained, library is in compliance with federal, state and local regulations and reporting requirements (such as annual report, payroll withholding and reporting, etc.) | E | S | N | U |
| • Positive relationships with government, foundation and corporate funders are in place | E | S | N | U |
| • Positive relationships with individual donors is established | E | S | N | U |
| • Funds are disbursed in accordance with budget, contract/grant requirements and donor designations | E | S | N | U |

Comments:

FM/LC/F totals: E ____ S ____ N ____ U ____

Board of Trustee relationship

- | | | | | |
|---|---|---|---|---|
| • Appropriate, adequate, and timely information is provided to the board | E | S | N | U |
| • Support is provided to board committees | E | S | N | U |
| • The board is informed on the condition of the organization and all important factors influencing it | E | S | N | U |
| • The board works effectively | E | S | N | U |

Comments:

BTR totals: E ____ S ____ N ____ U ____

Additional Comments:

[Return this form to the Board President for inclusion in the Summation Form that will be used during the face-to-face appointment with the director.]

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Illinois Public Library Trustee Manual

2016



Library Trustees and Personnel Practices

Understand how the board's role and the library director's role differ

The board of trustees and the library director are both involved in library governance and policy development, financial management, and personnel administration. However, the type and level of involvement must be clearly differentiated in order to avoid conflict and for the library to operate professionally and effectively.

Typically the board establishes overall personnel policies such as guidelines for salary and benefits, hiring practices, and other personnel actions unless the library is part of a town/city and must follow municipal policy. If the library is part of a municipal system that maintains authority to hire the director, the board hires the library director and sets salary and benefits.

Your public library director is an administrator and is responsible for the day-to-day management of the library. The director acts as the professional/technical adviser to the library board on policy, finances, planning, library performance and more.

Some of the ways the roles of the library director and the board differ are:

- The library director may suggest or draft policies. It is the board that actually adopts the policies. Once a policy is adopted, the director and staff carry it out as they operate the library.
- The board hires and evaluates the library director while the director hires and evaluates other staff.
- The library director may draft a budget request; the board officially adopts the budget.

Use the chart below to openly discuss the board's role and the director's role. Most conflicts can be avoided if the board and director understand and respect each other's roles.

Duties and Responsibilities of the Board and Library Director

| Library Board | Library Director |
|---|---|
| Staff: Employ a competent and qualified librarian. Includes recruiting, hiring and annually evaluating the director based upon a well-defined job description and expectations. Adopt personnel policy and set adequate salary and benefits for all staff. | Staff: Recruit, hire and annually evaluate library staff based upon well-defined job descriptions and expectations. Suggest improvements needed in salaries, working conditions and personnel policy. |
| Policy: Determine and adopt written policies to govern the operation of the library. | Policy: Carry out the policies of the library as adopted by the board. Recommend policies to library board. |
| Planning: Determine the direction of the library by studying community needs. See that a plan is developed for meeting needs and that the plan is carried out. | Planning/Management: Suggest and carry out plans for library services. Manage day-to-day operation of library. Design library services to meet community needs and interests. Report library's progress and future needs to the board. |
| Budget: Examine budget proposed by the director; make revisions as needed; officially adopt the budget; present library budget to mayor/city council. Review expenditures in accord with budget, amending line items within the budget if needed. | Budget: Prepare and submit to library board a budget request based on present and anticipated needs. Maintain complete and accurate records of finances. Expend funds based on approved budget. |

| Library Board | Library Director |
|---|---|
| Advocacy: Advocate for library through contacts with general public, civic organizations and public officials. Attend city council meetings to keep council informed on library activities. Work to secure adequate funds to carry out the library's services. | Advocacy: Advocate for library through contacts with general public, civic organizations and public officials. Attend city council and/or county supervisor meetings. Work to secure adequate funds to carry out the library's services. |
| Legal Issues: Be familiar with library ordinance as well as state and federal laws affecting the library. | Legal Issues: Be familiar with library ordinance and keep board informed on laws affecting library. |
| Continuing Education: Participate in continuing education activities and encourages library director to do the same. Provide and/or see that new trustees receive an orientation to the library. | Continuing Education: Participate in continuing education activities and professional organizations; encourage continuing education for library staff. Participate in orientation of new trustees. |
| Communicate with the library director | Communicate with the library board |
| Collection Development: Adopt collection development policy. | Collection Development: Select and order all books and other library materials and resources. |
| Board Meetings: Regularly attend board meetings; conduct affairs of board at regularly scheduled meetings. | Board Meetings: Attend board meetings; prepare written progress report; provide information as needed/requested by board. |
| Board Member Recruitment: Recommend qualifications and candidates for board to mayor/city council. Notify city of board vacancies. | Board Member Recruitment: Assist in developing qualifications for new trustees. |

Working with the Library Director

Human relationships determine the inner climate of the library. Every effort should be made to maintain cordially cooperative and mutually productive relationships. Chief among these relationships, because of its effect on the overall library administration, is that between the library board and the library director. The working relationships that prevail within the library determine the attitudes of librarians and staff, which in turn determine the quality of service offered to the public.

The board delegates all library management responsibility to the director. The board's job is monitoring the director's effectiveness in providing library service to the community. This system is effective because it has a board of trustees who represent the interests of the community and a qualified director who has the skills to make the library run efficiently within the parameters set by the board. How much does the board do and what are the responsibilities of the library director? There are several ways to clarify responsibilities:

- Look at the relationship with the director as a partnership between the board and the director in providing the best library service to the community.
- The board members' duties can be defined loosely as dealing with issues that affect the whole library and its position in the community. The board sets parameters of how the library will operate. Then the director's duty is to carry out the day-to-day functions (procedures) of running the library within the parameters (policies) set by the board.
- Open communication prevents confusion and conflict. Board members and the director must feel free to discuss their respective roles.

The director is a valuable resource to the board on all issues and often the leader on many issues that come before the board. The director should attend all board meetings and be encouraged and expected to make well-supported recommendations on all issues that come before the board. The director should be expected to take part in deliberations to help the board make decisions in the best interests of the library service to the community.

Although the director is responsible for the management of the library, the board retains ultimate responsibility. It is the right and responsibility of the board to request from the director all information necessary to fulfill the board's governing responsibility. It is the director's obligation to report to the board accurately and completely about how the library is being managed including problems, plans, progress.

The director is responsible to the board as a whole, but not responsible to each board member individually. Individual board members, including the board president, have no power to make demands or give orders to the director. This does not rule out individual board members asking the director for clarification about issues facing the board or discussing with the director concerns that individual board members may have. The board must speak with one voice when delegating to the director, when giving direction to the director, when requesting information. The director must serve the board as a whole in order to manage the library efficiently.

→ 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 from 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.

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.*

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.

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.

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. It is important that reasons for dismissal are carefully documented. 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. Working with the community's HR staff is very helpful in this process to ensure all procedures are followed correctly.

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?

Trustee Essentials

A Handbook for Wisconsin

Public Library Trustees

Developed by
Public Library Development Team



Wisconsin Department of Public Instruction
Tony Evers, PhD, State Superintendent
Madison, Wisconsin

6

Evaluating the Director

Evaluating the library director is often one of the more difficult tasks faced by a public library board of trustees, but it doesn't need to be. It is only difficult when a board is unsure of the process to follow or the criteria to be used to evaluate the job performance of their director. The following is a discussion of the methodology and criteria a board may use to carry out the review. Though this *Essential* is a discussion of evaluating the director, some of these methods may be used by the director to evaluate other staff.

There are several good reasons for carrying out a review of your library director:

- A review provides the director with formal feedback on his/her job performance.
- A review can be a tool for motivation, encouragement, and direction.
- A review can provide the board with valuable information about the operations and performance of the library.
- A review can help to establish a record of unsatisfactory performance if there is ever cause to discipline the director or terminate employment.
- A review can give the board and the director a formal opportunity to evaluate the job description and adjust it as necessary.

A well-executed performance review is the culmination of formal and informal communication carried out throughout the year regarding the activities of the director. Problems are best brought to the attention of the director as they occur, rather than stored up for the annual review. Success, accomplishment, and simple hard work or dedication should be acknowledged as it is observed, as well as at the annual review.

Who Should Carry Out the Review?

Though it is the board as a whole that is responsible for oversight of library operations and the activities of the library director, often boards decide to delegate the task of developing a preliminary evaluation of the director to a personnel committee or specially appointed committee of the board. Whether the whole board takes part or a committee does the work depends on the makeup of the board and the time available to board members. Often a board may have experienced managers or human resource professionals among its members. Other board members may be less experienced in personnel management. The key here is consistency and deciding ahead of time who will take part. At any rate, the *entire* board should review, discuss, and approve the final written evaluation.

Those charged with carrying out the evaluation should avoid relying on chance comments from library employees. Comments solicited from employees *with the knowledge of the director* can be helpful when solicited in a formal, organized

In This Trustee Essential

- Reasons for evaluating the director
- Who should carry out the review
- The basis and criteria for the review
- Methods and questions to consider

fashion. Board members should bear in mind that the director is hired to manage the daily operations of the library on behalf of the board and community. The chain of communications should always flow from library employees through the director to the board.

The Basis for the Review

The performance review should be based on three factors:

1. The director's performance as it relates to a written job description (see attached sample form, which incorporates points from the sample job description furnished with *Trustee Essential #5*).
2. A list of objectives for the preceding year jointly written and agreed upon by the director and the board.
3. The success of the library in carrying out service programs, as well as the director's contribution to that success.

The director's job description should be kept up to date and be a realistic statement of the work that needs to be done. The director needs to know what is expected. For example, what role will the director play in fundraising? Is the director the primary fundraiser, or is a volunteer or member of the board the primary fundraiser? Is the director expected to work a service desk? Is the director expected to attend every city council meeting? A director should not be faulted for failing to do something that was never officially decided at the time of hire or at a later board meeting.

Including a discussion of the director's job description at the time of hire and during the annual performance review provides an opportunity to change the job description as the needs of the organization change. Job descriptions need to change as technology and environmental factors affect them. The library director is the resident authority on what is new at the library and how tasks change in light of new priorities. Board members can learn a lot about the library by discussing changes in staff job descriptions with the director.

Establishing a list of objectives for the director is important to assure continued growth for the director as an individual as well as for the organization. Some objectives may be project oriented, such as completing a weeding of the collection in the coming year, or upgrading the automation system. Other objectives may be more personal, such as those contributing to professional development. Though the director should be the one primarily responsible for suggesting his or her objectives for the coming year, they should be discussed and agreed upon by the board.

The objectives of the director should be closely related to the strategic plan of the library. Establishing objectives can be an exercise in creativity in searching for new ways to improve the library. Failure to attain some objectives does not necessarily indicate poor job performance. Many times, outside factors may have prevented success or a director may simply have been too ambitious in the number of projects planned for a year. Some objectives may not be reached because they were experimental in nature. The important factors to remember when evaluating

objectives are progress, initiative, and the willingness of the director to expand the limits of his or her work and understanding. A director who accomplishes all of his/her objectives may be an exceptional employee or may simply have been quite conservative in what he or she set out to do.

Assessing the degree to which the director contributes to the success of the organization can be especially helpful to library boards as they evaluate the director. Library board members are continually viewing the library from the outside, since they do not participate in the daily management of the organization. Good board members are library users who experience library services first hand. As community leaders, they are aware of the image of the library within the community. The library board needs to be able to examine the resources of the library and the resourcefulness of the director and see how these have been utilized to manage library services successfully.

Examining resource management is a far more reliable tool for reviewing the library director than relying on subjective comments from individuals. The board has a variety of resources at its disposal by which to evaluate resource management. The monthly financial statement and statistical reports are good examples. Your library system office can also suggest a variety of output measures by which the board may judge the success of the library and, by extension, the success of the director.

How to Conduct the Review

When conducting the annual formal performance review, it is very helpful to have the director fill out review forms as a self-assessment. The board, or review committee, should fill out a second set of forms. By comparing assessments, the director and board can easily establish areas of agreement and work to resolve disagreements. All discussions of the director's job performance should be carried out in legally posted closed session meetings. (See *Trustee Essential #14: The Library Board and the Open Meetings Law*.)

The director's self-assessments may or may not be considered part of the permanent record; however, the director should have the opportunity to respond in writing to reviews placed in his or her permanent file. Written comments should always be part of the permanent record with one copy kept at the library and a second copy kept at city hall. No performance review should ever be placed in a personnel file without the knowledge of the director. The director should sign the review indicating that he or she has been given the opportunity to read and discuss the evaluation. Signing a review should not be construed as agreement.

The basis of the evaluation should be the up-to-date job description and the annual performance objectives agreed to by the director and board. See the *Sample Annual Library Board Calendar* (attached to *Trustee Essential #4: Effective Board Meetings and Trustee Participation*) for a possible evaluation timetable. There are many forms available for your adaptation and use when evaluating a director. Your library system office should be able to furnish you with some samples. (See also the attached *Sample Performance Appraisal Form*.) Here are some key questions to consider in the evaluation process:

- How well has the director utilized the resources available to him/her? Is library service provided efficiently and effectively at your public library?
- Does the community like and respect the director? Is he/she accessible? Do people enjoy coming to the library?
- Is the library in good financial shape? Does the director stay within the budget and provide clear and timely reports to the board? Does the annual budget, as initially drafted by the director, adequately reflect the needs for library service in the community? Is the director successful in obtaining necessary funding (with the help and involvement of the board)?
- Does the director communicate effectively to staff? Is he/she a good supervisor?
- Is use of the library increasing? If not, why not? (Success is not strictly the responsibility of the director, but of course he/she has much direct influence.)
- Is the director creative, willing to try new things, and does he or she give considerable effort to making programs work?
- Does the director accurately and fully provide the board with the information you need to do your job? Does the director provide the board with well-considered advice?
- Has the director put appropriate effort into achievement of the annual objectives agreed to between the board and director? Is the director striving to accomplish the goals and objectives of the library's strategic plan?

This *Trustee Essential* was written to give library trustees a brief overview of the general performance evaluation process. Those boards contemplating establishing a review process, or trustees taking part for the first time, are well advised to contact their system office for assistance.

Trustee Essentials: A Handbook for Wisconsin Public Library Trustees was prepared by the DLT with the assistance of the Trustee Handbook Revision Task Force.

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Sources of Additional Information

- Attached Sample Performance Appraisal Form
- Your regional library system staff (See *Trustee Tool B: Library System Map and Contact Information*.)

Sample Performance Appraisal Form

[Note: This sample should be adapted to reflect the job description of your director and the needs of your local library.]

Job Title: LIBRARY DIRECTOR

Name: _____ Date: _____

Reason for Appraisal: End of Probation Annual Final Other

Administrative Services

Specific Duties:

1. Act as the library board's executive officer.
2. Serve as the technical adviser to the board.
3. Implement the policies of the library as established by the board.
4. Prepare the draft of the annual library budget for board discussion and approval.
5. Participate in the presentation of the adopted budget to local officials.
6. Receive and expend library funds according to established guidelines, and maintain accurate and up-to-date records showing the status of library finances.
7. Recruit, select, hire, supervise, evaluate, and terminate if necessary, library staff in conformity with library policy and state and federal law (and any applicable local civil service regulations and/or union contracts).
8. Prepare library board meeting agendas and necessary reports in cooperation with the library board president, and notify board members of scheduled meetings.
9. Prepare state annual report for review and approval by the library board.
10. Inform and advise the library board as to local, regional, state, and national developments in the library field and work to maintain communication with other area libraries and the library system.

Rating: Excellent < 6 5 4 3 2 1 > Poor

Narrative evaluation and assessment of effort in achievement of annual objectives:

Collection Management

Specific Duties:

1. Select or direct the selection of materials for all media and all age groups, based on the library's approved collection development policy.
2. Catalog and classify library materials according to accepted standards and maintain the public catalog.
3. Process materials to provide appeal, protection, and control.
4. Develop and maintain a regular weeding schedule.
5. Periodically review the collection development policy and make recommendations to the library board for revisions.
6. Oversee the shelving and organization of materials.
7. Prepare and distribute overdue notices to users with overdue or lost materials.
8. Maintain an accurate and up-to-date database of user registrations and activities, including information adequate to support reimbursement requests for nonresident borrowing.

Rating: Excellent < 6 5 4 3 2 1 > Poor

Narrative evaluation and assessment of effort in achievement of annual objectives:

Service and Service Promotion:

Specific Duties:

1. Develop and execute an array of service programs to address the various needs of users and to make the library more accessible to all. These might include: preparation and dissemination of bibliographies of popular topics and genre collections; tours of the library for school, daycare, and homeschooling groups; inclusion of interesting displays of an educational or cultural nature; presentations to local organizations or groups on the benefits offered by the library; provision of story time sessions for small children, and teen and adult book discussion sessions; support of a summer reading program; acquisition of special materials and provision of accommodations to encourage use of the library by individuals with special needs; development of a homebound service for residents unable to visit the library.
2. Provide friendly and efficient direct assistance to users checking out materials, requesting directional or community information, or seeking materials or information on specific topics.

3. Prepare news releases and submissions to the media to announce new or special services and events that spotlight the library.
4. Assist and guide local volunteer groups (e.g., Library Friends) who wish to help with library promotion, fundraising, and enhancement of services.
5. Prepare grant applications, when grant opportunities are offered, in order to supplement local funding of library operations and development.
6. Maintain records showing all programs offered and number of attendees at each program.
7. Continually investigate the value, costs, and logistics of adding library services, new media, and new technologies in order to keep the library current and proactive in its service provision to the public.
8. Conduct ongoing evaluations of existing library programs, services, policies, and procedures, and submit recommendations for improvements to the library board.

Rating: Excellent < 6 5 4 3 2 1 > Poor

Narrative evaluation and assessment of effort in achievement of annual objectives:

Facilities Management

Specific Duties:

1. Oversee care and maintenance of the library building and grounds.
2. Oversee the work of custodial staff.
3. Regularly review building needs and advise the board in its planning for future expansion or development.
4. Assess the adequacy of existing facilities in regard to the provision of automated services.

Rating: Excellent < 6 5 4 3 2 1 > Poor

Narrative evaluation and assessment of effort in achievement of annual objectives:

Certification:

Board President's Signature _____ Date _____

Library Director's Signature _____ Date _____

Trustee Essentials: A Handbook for Wisconsin Public Library Trustees was prepared by the DLT with the assistance of the Trustee Handbook Revision Task Force.

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DIRECTOR EVALUATION – Purpose

The primary purpose of the Director Evaluation process is to provide feedback so that the Director may better fulfill his/her responsibilities. This system promotes a two-way process that protects and promotes the relationships between the Director, his/her staff, and the Board of Trustees, as well as the Director's ability to accomplish the identified goals.

DIRECTOR EVALUATION – Process

In general, the process allows for a collaborative structure that includes goal setting (Strategic Plan, Professional, and Personal), and a triangulation of evaluation . . . the “sense of the Board” as established by individual trustee evaluations, the “sense of the Department Heads” as established by individual department head evaluations, and the self-evaluation of the director.

A Personnel Committee will be appointed by the Board to receive the anonymous individual evaluations and compile the information provided into “sense of the Board” and “sense of the Department Head” documents. Individual evaluations are to be completed anonymously, preferably on a computer, and independent of input from other individuals.

The ideal timeline for the process of evaluation is as follows:

June & July:

- Director and Personnel Committee agree to the Strategic Plan Goals, Professional Goals, and Personal Goals relative to the Director's Evaluation for the new fiscal year.

December:

- At least one week prior to the monthly Board of Trustee Meeting, the Director distributes a written up-date report concerning the established Strategic Plan Goals, Professional Goals, and Personal Goals relative to the Director's Evaluation.
- At the monthly Board of Trustee Meeting, the Board and Director will discuss the summary report in closed session.

March:

- Director distributes a written self-evaluation document to each trustee. The self-evaluation document includes her/his accomplishments, progress toward attaining the established goals, and any “issues” that need to be relayed to the Board of Trustees.
- Personnel Committee distributes the “Department Head Form” of the Director’s Evaluation to each Department Head and “Individual Trustee Form” to each Trustee.
- Personnel Committee collects individual forms from Department Heads and Trustees.
- Personnel Committee transfers the individual ratings and comments to the “Sense of the Department Head” and “Sense of the Board” documents.

April:

- Personnel Committee presents “Sense of the Department Heads” and “Sense of the Board” at a closed session of the Board for the purpose of evaluating the Director. Based on this discussion, the Board will direct the Personnel Committee to meet with the Director and share this information.

May:

- Director meets with Personnel Committee and participates in a dialogue relative to the “Sense of the Board of Trustees,” the “Sense of the Department Heads,” noted celebrations, and suggested areas for improvement.

DIRECTOR'S EVALUATION

Individual Trustee Form

FISCAL YEAR 2006-2007

The evaluation of the director is comprised of two parts: the evaluation of his/her performance of general administrative duties, and the evaluation of progress towards established goals.

This individual evaluation is to be completed independent of any other individual's input. To ensure anonymity, please place the completed evaluation form in the Personnel Committee mailbox on or before Monday, April 2, 2007. All information provided by you is considered confidential. The Personnel Committee will compile individual ratings and comments into a "Sense of the Board" document. While the "Sense of the Board" document will be shared with the entire Board and the Director, due to the anonymous completion of this individual evaluation specific ratings and comments will not be identified with any individual.

General Administration

Rate each item on a scale of 1 to 5, with 1 being the lowest and 5 being the highest. A rating of 3 is considered the competent achievement of the duty. (The rating scale is listed below.) Any rating other than "3 Meets expectations" MUST be accompanied by a comment. However, comments are encouraged on all items.

1 Well below expectations

2 Below expectations

3 Meets expectations

4 Above expectations

5 Well above expectations

| Rating | Item |
|---------------|--|
| 1. | <u>MANAGEMENT STYLE:</u> participative, receptive to input, empowering, fair, open to new ideas, displays a maturity of judgment, not invested in power, does not micro-manage... |

Comments:

- 2. **PROFESSIONAL KNOWLEDGE & SKILLS:** familiarity with all facets of library functions, familiarity with other governmental bodies, has financial knowledge and is budget conscious, guides staff in collection development and programming, understands and interprets day-to-day legal requirements. . .

Comments:

- 3. **INTERPERSONAL AND COMMUNICATION SKILLS:** committed to staff development, committed to personal development, listens, non-defensive, not easily upset, a “people person,” a “bridge-builder,” open to criticism. . .

Comments:

- 4. **WORK ETHIC:** ethical beyond legal requirement, has personal integrity, admits mistakes, is careful with the truth, enjoys her/his work. . .

Comments:

____ 5.

COMMUNITY INVOLVEMENT: actively involved in our community, pro-active, reaches out & initiates. . *

Comments:

____ 6.

RELATIONSHIP WITH BOARD: partners with the Board, responsive to Board directives, encourages mutual support, actively supports and promotes the Strategic Plan. . .

Comments:

____ 7.

PERSONAL AND PROFESSIONAL GROWTH: participates in conferences & training opportunities, sets and pursues goals, is intellectually curious, laughs, has fun. . .

Comments:

8. **VISION ORIENTED:** has imagination, a trend setter, not a trend follower, has common sense, creative, open. . .

Comments:

9. **STRATEGIC PLAN:** aggressively supports the Strategic Plan, aggressively promotes the Strategic Plan, initiates new ideas, encourages staff to support the Strategic Plan, encourages staff to initiate new ideas. . .

Comments:

Progress Towards Attainment of Goals

Rate the progress toward each goal using a scale of 1 to 5, with 1 being the lowest and 5 being the highest. A rating of 3 is considered the expected progress toward completion of the goal. (The rating scale is listed below.) *Any rating other than "3 Meets expectations" MUST be accompanied by a comment. However, comments are encouraged on all items.*

- 1 Well below expectations**
- 2 Below expectations**
- 3 Meets expectations**
- 4 Above expectations**
- 5 Well above expectations**

STRATEGIC PLAN GOALS:

| Rating | Goal | Comments: |
|---------------|-------------|------------------|
| _____ | _____ | _____ |

PROFESSIONAL GOALS: (at most 2 or 3)

These goals are “site specific” and pertain only to the Warrenville Public Library District.

| Rating | Goal | Comments: |
|---------------|-------------|------------------|
| _____ | _____ | _____ |

PERSONAL GOALS: (at most 2 or 3)

These goals are “director specific” and pertain only to our current director.

| Rating | Goal | Comments: |
|---------------|-------------|------------------|
| _____ | _____ | _____ |

OVERALL ACHIEVEMENT OF THE DIRECTOR:

Specific recommendations for improvement of performance.

Needs to be considered in establishing future professional goals.

Needs to be considered in establishing future personal goals.

Core & Elective Competencies

Definitions and Sample Behaviors

For each competency and definition, sample behaviors have been identified for three levels of performance:

- **Exceeds Expectations**

Results achieved exceed in most areas of job competencies and goals. Level of contribution and expertise is generally recognized within and beyond the immediate work group. Demonstrates better than planned progress toward many targeted results.

- **Meets Expectations**

Results achieved consistently meet and sometimes exceed performance expectations in all areas of job competencies and goals. Overall performance is thoroughly acceptable for the requirements of the position. Demonstrates progress as planned toward targeted results.

- **Needs Improvement**

Results achieved do not consistently meet and often fall below job competencies and goals. May achieve expectations in some categories, but overall level of achievement does not accomplish job responsibilities. Fails to demonstrate progress as planned toward targeted results. Improvement is needed so that all major job objectives are fulfilled. Close supervision is required.

Core competencies are critical to the success of the Library District and apply to all employees:

Teamwork

Job Knowledge & Application

Communication

Flexibility/Adaptability

Customer Service/Interaction with Others

Image/Integrity

Elective competencies are also critical to the success of the Library District, but may differ among individual employees. Employees will be evaluated on one-to-two elective competencies each year. In addition, those employees with supervisory/managerial responsibilities will be evaluated on *Leadership*.

Problem Solving & Decision Making

Self Development

Innovation

Leadership

Planning and Organizing

Warrenville Public Library District- Core Competencies

Teamwork (core competency)

Builds good working relationships with staff members across the library. Shows respect for others and values their contributions. Cooperates with others and works as part of a team to make valuable contributions toward achieving library goals.

- 1. Exceeds Expectations**
 - a. Volunteers for special assignments or committees
 - b. Exhibits leadership characteristics in team interactions
 - c. Takes on additional, possibly less desirable, project tasks outside of regular work assignments
 - d. Helps the team overcome obstacles and remain positive
 - e. Actively engages and encourages other team members to participate in and accomplish library objectives
 - f. Proactively utilizes individual strengths or the strengths of others to improve team dynamics, work processes, etc.
 - g. Helps and enables others to succeed
- 2. Meets Expectations**
 - a. Actively participates in meetings and/or committees
 - b. Comes prepared to meeting
 - c. Completes committee tasks as assigned
 - d. Considers different perspectives and the opinions of others
 - e. Treats other team members with respect
 - f. Willing to help others, as needed (across the library)
 - g. Develops positive working relationships with other staff members
 - h. Acknowledges the contributions of others
- 3. Needs Improvement**
 - a. Other team members need to cover this employee's work
 - b. May reference or convey that certain responsibilities are "not part of my job"
 - c. Fails to complete assignments
 - d. Fails to participate in meetings or projects
 - e. Hesitant to help others
 - f. Speaks negatively of others
 - g. Undermines team or library initiatives
 - h. Withholds work related/job specific information from the team
 - i. Complains about or has a negative demeanor toward the team

Warrenville Public Library District- Core Competencies (continued)

Communication (core competency)

Communicates clearly, effectively and concisely in both written and verbal forms. Actively listens to others' ideas and perspectives. Communicates with tact and diplomacy, and remains sensitive to the diverse communication styles of others. Presents a positive demeanor through tone and phrasing of messages.

1. Exceeds Expectations

- a. Proactively keeps others abreast of changes
- b. Communicates difficult information in a positive manner
- c. Anticipates communication needs
- d. Tailors message to the audience
- e. Seeks out new communication methods or vehicles
- f. Follows through to confirm receipt, confirm understanding and ensure action

2. Meets Expectations

- a. Willingly shares work information towards a positive end
- b. Actively listens; asks clarifying questions
- c. Provides timely information
- d. Shares the right amount of pertinent, relevant information
- e. Displays tact and diplomacy
- f. Uses appropriate communication method/medium (face to face, email, phone, etc.) for the message
- g. Flexes personal communication style to that of the receiver
- h. Presents appropriate, positive body language

3. Needs Improvement

- a. Uses poor grammar, spelling, syntax, etc.
- b. Non-communicative
- c. Communicates with a condescending or negative tone
- d. Fails to read and respond to emails and other correspondence
- e. Displays negative or inappropriate body language
- f. Relies on one (preferred) method of communication
- g. Displays a lack of tact and diplomacy

Warrenville Public Library District- Core Competencies (continued)

Customer Service/Interaction with Others (core competency)

Offers friendly, thorough and timely service to a diverse group of internal and external customers, including but not limited to library patrons and fellow staff. Takes time to fully explore customers' needs and tailors a response for each situation. Shares information openly to increase others' knowledge and ultimately improve the customers' experience.

1. Exceeds Expectations

- a. Anticipates the needs of others
- b. Actively offers assistance
- c. Offers additional assistance beyond what was originally requested
- d. When dealing with patrons, suggests appropriate (unsolicited) library programs/resources/services that might be of interest
- e. Diffuses difficult or potentially volatile situations gracefully
- f. Adds a personal touch to interactions with customers
- g. Becomes familiar with regular patrons
- h. Reaches out to new segments of the community

2. Meets Expectations

- a. Treats everyone with respect; behaves impartially, respects diversity (gender, age, etc.)
- b. Polite and courteous
- c. Attentive, responsive
- d. Friendly, patient
- e. Puts the patron first
- f. Acknowledges waiting customers (internal/external)
- g. Respectful of others' time
- h. Explores customers' needs
- i. Meets the expressed needs of the customer
- j. Enforces library rules and policies to enhance the customer experience
- k. Gives out accurate information

3. Needs Improvement

- a. Discourteous, disrespectful, argumentative or condescending
- b. Ignores internal and/or external customers
- c. Fails to listen to or address customer's need
- d. Consistently refers customer to others (passes them off)
- e. Treats customers unevenly; biased
- f. Impatient
- g. Untimely; slow to respond
- h. Gives out inaccurate information
- i. Ignores library policies and procedures

Warrenville Public Library District- Core Competencies (continued)

Job Knowledge & Application (core competency)

Applies knowledge to accomplish the primary responsibilities of the position and achieve results within established procedures, policies and timeframes. Maintains quality and performance standards in all situations, and accepts responsibility and accountability for all tasks performed. Utilizes resources (time, equipment, budget, etc.) to maximize efficiency and productivity.

1. Exceeds Expectations

- a. Exceeds productivity requirements for the job
- b. Actively searches for ways to increase efficiency
- c. Asks for and is willing to take on additional or more challenging work
- d. Looks for solutions, rather than problems
- e. Acts as a subject matter expert and resource for co-workers

2. Meets Expectations

- a. Understands and applies library policies and procedures
- b. Able to utilize available tools, resources and systems in performing job duties
- c. Seeks out information needed for job duties/project
- d. Accountable for own work
- e. Uses time effectively
- f. Makes minimal errors
- g. Consistently submits work on time; meets deadlines
- h. Communicates if deadlines/expectations cannot be met
- i. Alerts others of work/process changes

3. Needs Improvement

- a. Lacks understanding of or fails to apply policies and procedures
- b. Uses time or other resources ineffectively; disorganized
- c. Resists acquiring new knowledge or learning new applications or techniques
- d. Requires additional supervision
- e. Makes excessive or major errors
- f. Fails to complete work assignments or perform job duties
- g. Work must be completed by others
- h. Misses deadlines
- i. Lacks follow-through

Warrenville Public Library District- Core Competencies (continued)

Flexibility/Adaptability (core competency)

Modifies behaviors and work methods in response to new information, changing conditions or unexpected obstacles. Responds to and handles unexpected and/or difficult situations calmly and appropriately. Accepts, adapts to and encourages change as necessary to the library's growth.

1. Exceeds Expectations
 - a. Helps others to understand and/or accept change
 - b. Acts as a "champion" of change – outwardly, vocally supports new ideas
 - c. Offers to cross-train to better serve patrons
 - d. Volunteers for extra or "undesirable" shifts
 - e. Encourages and enthusiastically embraces change
 - f. Develops plans for change
 - g. Assumes the role of change agent - takes charge and sees ways to improve
2. Meets Expectations
 - a. Willing to try new things
 - b. Handles unexpected situations calmly and appropriately
 - c. Able to reprioritize and/or "switch gears"
 - d. Willing to change work schedules, as needed
 - e. Maintains composure in tense situations
 - f. Adapts and learns new procedures
 - g. Remains open to new ideas and continuous improvement
 - h. Supports new or modified policies or initiatives
3. Needs Improvement
 - a. Operates with tunnel vision
 - b. Actively resists change; undermines new initiatives
 - c. Criticizes change or new ideas; makes inappropriate or negative comments
 - d. Refuses to accept new work methods
 - e. Deflects new or challenging work
 - f. Displays frustration
 - g. Unwilling to compromise, change schedules, cover shifts, etc.

Warrenville Public Library District- Core Competencies (continued)

Image/Integrity (core competency)

Ensures all interactions are conducted with genuine honesty, dignity, and openness.

Demonstrates behaviors that reflect positively on the library and uphold the library values and image. Exhibits energy and enthusiasm for the job and the organization.

1. Exceeds Expectations

- a. Acts as an ambassador of the library at non-library locations/functions
- b. Advocates the positive image of the library in the community
- c. Actively seeks out opportunities and/or avenues to promote or improve the library
- d. Exhibits optimism, even in negative situations
- e. Addresses unethical behavior in others

2. Meets Expectations

- a. Ensures that personal appearance reflects a positive and appropriate image of library personnel
- b. Portrays a positive image of the library by acting professionally
- c. Speaks positively of library matters
- d. Displays enthusiasm for their job and the library
- e. Enthusiastically shares information about library programs and resources
- f. Follows confidentiality policy
- g. Honest in work and interactions with others
- h. Follows Principles of Professionalism
- i. Displays pride in the library; maintains neat, clean work environment

3. Needs Improvement

- a. Fails to display common courtesies
- b. Voices grievances about library matters and/or employees outside of problem solving procedure
- c. Uses a negative tone
- d. Makes disparaging remarks about library business; airs “dirty laundry”
- e. Engages in unethical or unlawful behaviors
- f. Negative about the job or about the library
- g. Inappropriately uses resources
- h. Abuses privileges
- i. Ignores or contributes to unsightly conditions

Warrenville Public Library District- Elective Competencies

Problem Solving & Decision Making (elective competency)

Recognizes and fully identifies problems. Gathers and analyzes data, evaluates a variety of options, and determines the best course of action. When appropriate, obtains necessary approvals, implements, and then ensures effectiveness of decisions.

1. Exceeds Expectations

- a. Proactively alerts others of potential problems before they create difficulties
- b. Re-evaluates decision if outcomes are undesirable
- c. Objectively analyzes data to develop the best solution for all involved
- d. Able to “think outside the box”; develops creative solutions
- e. Applies information from past situations to address similar future occurrences
- f. Sees opportunities for improvement; evaluates and suggests ways to improve or streamline processes or work flow to make it easier for internal/external customers

2. Meets Expectations

- a. Recognizes problems and proposes solutions
- b. Considers options prior to making a decision; seeks additional necessary information before making conclusions
- c. Asks the right questions
- d. Considers the needs of others when proposing solutions
- e. Solicits feedback from others
- f. Takes responsibility for decisions
- g. Implements appropriate course of action for resolution to problem

3. Needs Improvement

- a. Ignores problems
- b. Finds fault with others’ work or ideas rather than approaching the situation as an opportunity for improvement
- c. Identifies problems, but fails to act or suggest solutions
- d. Fails to alert others of problem situations
- e. Jumps to a conclusion or the first available solution
- f. Consistently relies on past solutions to problems, regardless of the situation
- g. Makes decisions at the expense of others

Warrenville Public Library District- Elective Competencies (continued)

Innovation (elective competency)

Generates new ideas, solutions, and challenges the status quo. Actively pursues new or improved ways of accomplishing tasks or supporting library objectives. Stays abreast of trends, remains open to new ideas, and focuses on continuous improvement.

1. Exceeds Expectations

- a. Seeks areas for improvement; encourages new initiatives
- b. Thinks "outside the box"
- c. Encourages and embraces innovation; outwardly, vocally supports creative ideas
- d. Develops plans to implement innovation based on information conveyed in meetings, at conferences, etc.
- e. Leads implementation of ideas
- f. Engages and encourages others throughout a new process
- g. Stays abreast of new technology/resources and proposes changes based on trends and best practices

2. Meets Expectations

- a. Supports innovation and change within the Library
- b. Generates new ideas and appreciates new perspectives
- c. Willing to learn new processes
- d. Identifies and communicates areas for improvement
- e. Reads magazines, journals, newspapers, to remain current on Library (and community) trends and issues
- f. Engages and networks with other library professionals
- g. Provides and shares ideas from meetings and conferences that could lead to Library improvement or new-expanded services
- h. Implements new ideas or initiatives

3. Needs Improvement

- a. Closed to new ideas/trends/technology
- b. Fails to implement new ideas or initiatives
- c. Resistant to innovative ideas or solutions
- d. Fails to participate in meetings to discuss improvements or new initiatives
- e. Criticizes the creativity or ideas of others
- f. Reacts unprofessionally to new initiatives or ideas
- g. Fails to act and implement ideas gained at conferences

Warrenville Public Library District- Elective Competencies (continued)

Planning and Organizing (elective competency)

Understands needs, establishes priorities and appropriately utilizes resources (time, technology, budgets) to proactively develop work plans. Monitors and adjusts ongoing plans to implement projects correctly and ensure they are completed in an effective and efficient manner.

1. Exceeds Expectations

- a. Anticipates needs
- b. Acts proactively, rather than reactively
- c. Has contingency plans in place
- d. Helps others to be more organized
- e. Able to direct or guide other staff through projects
- f. Seeks out tools and/or approaches to improve efficiency

2. Meets Expectations

- a. Develops measurable plans
- b. Identifies project components and steps
- c. Breaks down project into milestones
- d. Sets and sticks to timelines
- e. Focuses on priorities
- f. Knows when to reprioritize; adjusts plans as appropriate
- g. Keeps plans moving
- h. Uses time and other resources effectively
- i. Maintains an organized work system

3. Needs Improvement

- a. Fails to create or follow plans
- b. Fails to identify, address, or modify plans when faced with unexpected obstacles or outcomes
- c. Disorganization inhibits productivity
- d. Projects are often late/incomplete
- e. Wastes resources (time, money, etc.)

Warrenville Public Library District- Elective Competencies (continued)

Self Development (elective competency)

Pursues additional knowledge and skills to enhance personal growth and contribute to the success of the organization. Seeks opportunities for learning new areas and participates in new projects to keep skills current and broaden knowledge.

1. Exceeds Expectations

- a. Researches and looks for appropriate training and development opportunities beyond the normal scope of the job
- b. Seeks out leadership roles
- c. Self-identifies knowledge gaps and takes action to eliminate that gap
- d. Volunteers for committees outside of work group
- e. Willing to step outside their comfort zone

2. Meets Expectations

- a. Takes responsibility for personal career development; sets personal improvement goals
- b. Willing to learn and cross-train
- c. Acquires new knowledge and skills through training sessions, continuing education, workshops, meetings, professional reading
- d. Attends and participates in staff meetings
- e. Accepts and learns from constructive feedback
- f. Recognizes and addresses deficiencies or developmental needs (asks others, seeks information, etc.)

3. Needs Improvement

- a. Displays antiquated skills
- b. Doesn't accept or act on constructive feedback; sees it as criticism
- c. Blames others for the situation or for lack of personal growth
- d. Does not fulfill continuing education requirements
- e. Resistant or fearful of learning new things
- f. Fails to see relevance of new skills
- g. Complains about required participation in meetings, trainings, etc.

Warrenville Public Library District- Elective Competencies (continued)

Leadership (elective competency)

Encourages others to perform to the best of their ability. Communicates clear directions, defines realistic expectations, and appropriately delegates work. Provides ongoing guidance, meaningful feedback, and support by mentoring, developing, and motivating others in the execution of organizational goals and individual objectives.

1. Exceeds Expectations

- a. Proactively seeks projects to enhance employee skills and build on strengths
- b. Motivates employees to achieve their full potential
- c. Inspires employees to achieve excellence
- d. Respected; sought after as a mentor
- e. Able to engage employees to ensure support of library initiatives, even in difficult or challenging situations
- f. Sensitive to employees' individual needs
- g. Encourages employees' work/life balance

2. Meets Expectations

- a. Consistently and impartially applies and supports library policies and procedures
- b. Understands job duties of the entire department
- c. Recognizes support/staffing needs and appropriately delegates work
- d. Clearly communicates expectations and work assignments
- e. Provides structure to enable employees to work independently
- f. Explains decisions and the impact they will have on the department
- g. Consistently provides both positive and constructive feedback
- h. Actively listens and takes action on employees' behalf
- i. Models good behavior; leads by example
- j. Cultivates an environment of mutual respect and equality
- k. Builds a supportive and trusting relationship with staff
- l. Respects different work styles
- m. Uses mistakes as learning opportunities
- n. Supports the work/life balance of employees
- o. Documents employee performance, accomplishments, training, projects, etc.

3. Needs Improvement

- a. Fails to follow/implement policy
- b. Fails to promote interdepartmental coordination/communication
- c. Micromanages
- d. Fails to make necessary departmental decisions
- e. Delegates ineffectively or disproportionately
- f. Fails to explain work expectations/tasks
- g. Doesn't address performance issues
- h. Fails to provide positive or constructive feedback
- i. Addresses employees harshly, inappropriately or unprofessionally
- j. Treats staff unfairly; plays favorites
- k. Unavailable, unapproachable, unsupportive



28 W 751 Stafford Place • Warrenville, IL 60555 • 630/393-1171 • Fax 630/393-1688

Performance Management Evaluation

| | |
|----------------------------|----------------------|
| Employee Name | Department/Job Title |
| Length of Time in Position | Evaluation Period |

Signature

Date

| | |
|-----------------|--|
| Supervisor | |
| Department Head | |
| Director | |
| Employee | |

Teamwork- Builds good working relationships with staff members across the library. Shows respect for others and values their contributions. Cooperates with others and works as part of a team to make valuable contributions toward achieving library goals.

- Exceeds Expectations Meets Expectations Needs Improvement

Comments/Specific Behavioral Examples:

Communication- Communicates clearly, effectively and concisely in both written and verbal forms. Actively listens to others' ideas and perspectives. Communicates with tact and diplomacy, and remains sensitive to the diverse communication styles of others. Presents a positive demeanor through tone and phrasing of messages.

- Exceeds Expectations Meets Expectations Needs Improvement

Comments/Specific Behavioral Examples:

Customer Service/Interaction with Others- Offers friendly, thorough and timely service to a diverse group of internal and external customers, including but not limited to library patrons and fellow staff. Takes time to fully explore customers' needs and tailors a response for each situation. Shares information openly to increase others' knowledge and ultimately improve the customers' experience.

- Exceeds Expectations Meets Expectations Needs Improvement

Comments/Specific Behavioral Examples:

Job Knowledge & Application- Applies knowledge to accomplish the primary responsibilities of the position and achieve results within established procedures, policies and timeframes. Maintains quality and performance standards in all situations, and accepts responsibility and accountability for all tasks performed. Utilizes resources (time, equipment, budget, etc.) to maximize efficiency and productivity.

- Exceeds Expectations Meets Expectations Needs Improvement

Comments/Specific Behavioral Examples:

CORE COMPETENCIES- CONTINUED

SECTION 1

Flexibility/Adaptability- *Modifies behaviors and work methods in response to new information, changing conditions or unexpected obstacles. Responds to and handles unexpected and/or difficult situations calmly and appropriately. Accepts, adapts to and encourages change as necessary to the library's growth.*

- Exceeds Expectations Meets Expectations

- Needs Improvement

Comments/Specific Behavioral Examples:

Image/Integrity- *Ensures all interactions are conducted with genuine honesty, dignity, and openness. Demonstrates behaviors that reflect positively on the library and uphold the library values and image. Exhibits energy and enthusiasm for the job and the organization.*

- Exceeds Expectations Meets Expectations

- Needs Improvement

Comments/Specific Behavioral Examples:

ELECTIVE COMPETENCIES

SECTION 2

Problem Solving & Decision Making

Recognizes and fully identifies problems. Gathers and analyzes data, evaluates a variety of options, and determines the best course of action. When appropriate, obtains necessary approvals, implements, and then ensures effectiveness of decisions.

Exceeds Expectations Meets Expectations

Needs Improvement

Comments/Specific Behavioral Examples:

Innovation

Generates new ideas, solutions, and challenges the status quo. Actively pursues new or improved ways of accomplishing tasks or supporting library objectives. Stays abreast of trends, remains open to new ideas, and focuses on continuous improvement.

Exceeds Expectations Meets Expectations

Needs Improvement

Comments/Specific Behavioral Examples:

Planning and Organizing

Understands needs, establishes priorities and appropriately utilizes resources (time, technology, budgets) to proactively develop work plans. Monitors and adjusts ongoing plans to implement projects correctly and ensure they are completed in an effective and efficient manner.

Exceeds Expectations Meets Expectations

Needs Improvement

Comments/Specific Behavioral Examples:

Self Development

Pursues additional knowledge and skills to enhance personal growth and contribute to the success of the organization. Seeks opportunities for learning new areas and participates in new projects to keep skills current and broaden knowledge.

Exceeds Expectations Meets Expectations

Needs Improvement

Comments/Specific Behavioral Examples:

Leadership

Encourages others to perform to the best of their ability. Communicates clear directions, defines realistic expectations, and appropriately delegates work. Provides ongoing guidance, meaningful feedback, and support by mentoring, developing, and motivating others in the execution of organizational goals and individual objectives.

- Exceeds Expectations Meets Expectations Needs Improvement

Comments/Specific Behavioral Examples:

INDIVIDUAL GOALS AND DEVELOPMENT PLAN

SECTION 3

List up to three S.M.A.R.T. goals, responsibilities or tasks to be accomplished and indicate how these goals will be measured. Goals should support the Warrenville Public Library District's objectives. "Results" and achievements will be completed at the end of the evaluation period.

| Individual Goals | Measurement of Completion | Results |
|------------------|---------------------------|---------|
| 1. | | |
| 2. | | |
| 3. | | |

Warrenville Public Library District strongly supports the ongoing personal development of our employees. Training and development activities which focus on enhancing skills or job behaviors that are critical to the position are outlined below. Identify specific activities such as special projects, training, cross-training, seminars, certifications, etc., and how the successful completion of these development areas will be measured.

| Development Opportunity | Measurement of Completion | Results |
|-------------------------|---------------------------|---------|
| 1. | | |
| 2. | | |
| 3. | | |

OVERALL PERFORMANCE RATING

SECTION 4

On the basis of the employee's total performance during the rating period, mark the definition which best describes the employee's overall performance. Consider all factors evaluated, as well as the importance of each to the employee's job.

| | |
|-----------------------------|---|
| Exceeds Expectations | Results achieved exceed in most areas of job competencies and goals. Level of contribution and expertise is generally recognized within and beyond the immediate work group. Demonstrates better than planned progress toward many targeted results. |
| Meets Expectations | Results achieved consistently meet and sometimes exceed performance expectations in all areas of job competencies and goals. Overall performance is thoroughly acceptable for the requirements of the position. Demonstrates progress as planned toward targeted results. |
| Needs Improvement | Results achieved do not consistently meet and often fall below basic competencies and goals. May achieve expectations in some categories, but overall level of achievement does not accomplish job responsibilities. Fails to demonstrate progress as planned toward targeted results. Improvement is needed so that all major job objectives are fulfilled. Close supervision is required. |

Overall Performance Rating:

- Exceeds Expectations Meets Expectations Needs Improvement

Supervisor Comments: _____

Employee Comments: _____

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Evaluation Process Goals

- To formulate and articulate the Board's expectations of the Library Director and to communicate these to her in a constructive manner;
- To review and evaluate the Library Director's performance during a set period of time (i.e., the evaluation period);
- To help the Library Board determine whether or not the Library Director will receive increased remuneration as a result of his job performance during the evaluation period, as well as the nature and scope of any such increased remuneration; and
- To help the Library Director establish performance objectives for the next evaluation period.

The Evaluation Process

Each library trustee shall individually complete the accompanying Performance Evaluation Form and submit it to the Chairperson of the Library Board's Staffing and Personnel Committee by the deadline listed below. The Committee shall then compile the results into a single document that both summarizes the responses and articulates the Board's **consensus** regarding the Library Director's performance.

This document will be shared with the Library Director, who will then meet with the Committee to review and discuss the results. At this session, the Library Director shall be given the opportunity to ask questions about and respond to issues raised in the document. When formulating performance objectives for the ensuing evaluation period, the Library Director should address issues highlighted by the Board in the evaluation document as well as the mission, goals, objectives, and action steps articulated in the library's current Strategic Plan.

The effectiveness of this evaluation process shall be reviewed annually to determine whether the process needs to be revised.

Evaluation Items and Rating System

The items to be evaluated in the accompanying form derive from the Library Director's Job Description and list of Major Performance Objectives for Twelve-month Period from February 6, 2013 through February 6, 2014.

- Items 1 — 8: **Job Description – Responsibilities – Primary and Additional Duties**
- Items 9— 17: **Job Description – General Performance Requirements**
- Items 18— 22: **Major Performance Objectives (Goals)**

When rating the Library Director on these items, you should enter:

5 = Exceeded All Position's Job Duty Requirements/Performance Objectives

4 = Met All and Exceeded Some Position's Job Duty Requirements/Performance Objectives

3 = Met All Position's Job Duty Requirements/Performance Objectives

2 = Met Most and Failed to Meet Some Position's Job Duty Requirements/Performance Objectives

1 = Did Not Meet Position's Job Duty Requirements/Performance Objectives.

Regarding items 1 through 15 below, if either a "2" or "1" are given, the trustee must document the reasons for this under "Comments," citing specific examples of output, activities, behavior, etc. For ratings of "3, 4, or 5" comments are not required, but are appreciated. Comments are required from trustees for items 16-19 below.

Please return your completed Library Director Performance Evaluation Form to Staffing & Personnel Committee Chairperson **xxx** by **xxx**.

Name of Evaluating Trustee: _____

Date: _____

Ratings:

- 5 = Exceeded Position's Job Duty Requirements/Designated Performance Objectives
4 = Somewhat Exceeded Position's Job Duty Requirements/Designated Performance Objectives
3 = Met Position's Job Duty Requirements/Designated Performance Objectives
2 = Somewhat Met Position's Job Duty Requirements/Designated Performance Objectives
1 = Did Not Meet Position's Job Duty Requirements/Designated Performance Objectives.
- =====

Responsibilities – Primary and Additional Duties

Item No. **Description**

1. **Ongoing Library Operations.** Coordinate and oversee day-to-day library operations, including the delivery of library services and facility management.

Rating: _____ Category: Primary Duties

Comments:

2. **Short and Long-range Planning.** Coordinate all planning efforts of the staff and library board, to include: developing, implementing and evaluating library services; building and maintaining a strong, balanced, up-to-date and useful collection of library materials and resources; and developing and implementing strategic planning cycles.

Rating: _____ Category: Primary Duties

Comments:

LINCOLNWOOD PUBLIC LIBRARY DISTRICT
Library Director Evaluation
Director Name, Evaluation Period xxx - xxx

3. **Fiscal Management.** Develop and prepare the annual budget and related fiscal documents for the library board. Implement and manage the approved budget, and monitor and control expenditures. Oversee the ongoing business operations of the library.

Rating: _____

Category: Primary Duties

Comments:

4. **Board Relations and Policy Development.** Provide regular reports to the board about the status of the library and its services, resources and usage. Attend—and prepare background materials for—board and board committee meetings, and provide information, counsel and advice on all matters that are considered. Recommend and help formulate policies and policy changes. Execute decisions of the board.

Rating: _____

Category: Primary Duties

Comments:

5. **Personnel Management.** Provide for recruitment, training, supervision, evaluation, motivation and ongoing development of a highly effective, responsive and service-oriented staff. Directly supervise and evaluate the performance of the assistant library director, department heads and other administrative staff. Direct and coordinate the efforts of the staff management team.

Rating: _____

Category: Primary Duties

Comments:

LINCOLNWOOD PUBLIC LIBRARY DISTRICT
Library Director Evaluation
Director Name, Evaluation Period xxx - xxx

6. ***Public Awareness and Relations.*** Develop and sustain a public information program that effectively informs the community about library services and promotes a strong library presence in Lincolnwood. Represent the library on occasions that require professional competence for promoting library services, programs and goals, and for explaining policies, procedures and operations. Pursue and maintain contact with other community organizations, including the *Friends of the Library*, and develop methods of cooperation. Establish effective working relationships with community leaders and officials. Assist with development and fundraising efforts on behalf of the library, including the pursuit of appropriate grants. Serve on committees of library and community organizations whose efforts may affect the nature and quality of library service.

Rating: _____ Category: Primary Duties

Comments:

General Performance Requirements

7. **Competence** relates primarily to technical aspects of the job: the ability to learn various job functions, to perform them correctly and completely, and to understand why they are necessary and how they affect library operations and other staff members.

Rating: _____ Category: General Performance Requirements
Comments:

8. **Productivity** is the ability to function efficiently and purposefully so as to produce the expected volume of useful work in a timely manner.

Rating: _____ Category: General Performance Requirements
Comments:

9. **Initiative** is the capacity to view one's duties broadly rather than narrowly, to be a "self-starter", to anticipate problems or needs and be resourceful in handling them, to step forward to address issues without being specifically directed to do so and to take responsibility for thorough and effective follow-through.

Rating: _____ Category: General Performance Requirements
Comments:

LINCOLNWOOD PUBLIC LIBRARY DISTRICT
Library Director Evaluation
Director Name, Evaluation Period xxx - xxx

10. **Commitment** is characterized by dedication and a sense of responsibility to co-workers and the library as well as to the job. Committed employees can be relied on to set a good example for co-workers. They consistently fulfill their work schedules, exhibit good work habits, meet deadlines and give extra of themselves when necessary.

Rating: _____ Category: General Performance Requirements

Comments:

11. **Judgment** is the ability to make appropriate decisions given both the situation at hand and the employee's position at the library, to exercise discretion where needed and to correctly establish priorities between multiple responsibilities.

Rating: _____ Category: General Performance Requirements

Comments:

12. **Teamwork** is the capacity to interact and communicate effectively with co-workers for the common good of the staff and the library. A cooperative, non-competitive spirit, supportiveness, courtesy, and respect for the feelings, circumstances and perspectives of others all contribute to teamwork and staff cohesiveness. The library director must be able to inspire a team approach in others and thrive in such an environment. An ability to adapt to change and a willingness to accept direction and constructive criticism from the library board are also needed.

Rating: _____ Category: General Performance Requirements

Comments:

LINCOLNWOOD PUBLIC LIBRARY DISTRICT

Library Director Evaluation

Director Name, Evaluation Period xxx - xxx

13. **Effective Public Service and Interpersonal Contact** depends on attitude, demeanor and appearance as well as on specific skills. Responsiveness, courtesy, helpfulness, the ability to speak and write clearly and grammatically, a neat personal appearance and an orderly work space enhance customer satisfaction and project a positive image of the library with the public and others.

Rating: _____

Category: General Performance Requirements

Comments:

14. **Professionalism** includes bringing to the job a body of knowledge and expertise in the fields of library and information science and administration. This is characterized by a skillful implementation of library procedures, operations and services, as well as by a willingness to keep abreast of library trends, philosophies of service, and technology as part of one's own professional development. It entails attending workshops and conferences, reading professional literature and pursuing other methods of continuing education.

Rating: _____

Category: General Performance Requirements

Comments:

15. **Leadership** is characterized by the willingness and ability to assume responsibility. Employees who are leaders model the work habits, behaviors and attitudes expected of all library staff. Effective leaders exhibit creative problem solving skills and the ability to grow and develop in times of change. The library director, who sets both the tone for service delivery and the direction for library development, must have effective supervisory skills, including the capacity to motivate and guide staff to perform to the best of their abilities.

Rating: _____

Category: General Performance Requirements

Comments:

Major Performance Objectives

16. Goal #1: **xxx**

Rating: _____ Category: Performance Objectives
Comments:

17. Goal #2: **xxx**

Rating: _____ Category: Performance Objectives
Comments:

18. Goal #3: **xxx**

Rating: _____ Category: Performance Objectives
Comments:

19. Goal #4: **xxx**

Rating: _____ Category: Performance Objectives
Comments:

Evaluation Process – Cary Area Library

My Board uses the attached form that is from a PLA program one of them attended in the past. Blank copies are given to each board member with a stamped envelope that is addressed to the Board President. They fill out and send their responses anonymously. President tallies and presents the compiled results for discussion at the next meeting in closed session. The following week, the Board President and the Director have a one on one discussion regarding expectations for the following year.

Cary Area Library

Director 2015 Annual Evaluation

Using the following scale, please give your impression of the performance of the Executive Director during the past twelve-month period. Use the space provided under each item for any additional comments you choose to make.

Evaluation Scale

| | | |
|---|----------------|--|
| 9 | Outstanding | Far exceeds performance criteria |
| 7 | Excellent | Exceeds normal expectations |
| 5 | Average | Generally meets expectations |
| 3 | Weak | Erratic performance, falls short of expectations |
| 1 | Unsatisfactory | Unacceptable performance |

1. Relationship with Board _____

Keeps Board informed of issues, needs, and operations of the Library. Offers professional advice on issues requiring Board action. Supports and implements Board policy and communicates the Board's intentions to the staff and public. Sets specific goals for the Library and reports status of progress toward achieving these goals in measurable ways.

2. Staff and Personnel Relationships _____

Develops and implements sound personnel procedures and practices. Provides a good working environment within the Library which insures good staff morale and loyalty to the Library. Recruits and retains quality employees whenever possible. Delegates authority whenever appropriate. Anticipates problems with the staff and works to avoid conflict. Is fair and even handed when dealing with the staff.

3. Business and Finance _____

Evaluates and anticipates the financial needs of the Library and keeps within the budget approved by the Board. Supervises operations, uses good fiscal judgment and insists on competent and efficient performance from our bookkeeping professional. Maintains an open line of communication with our attorney and seeks council when appropriate.

4. Community Relationships _____

Is visible in the community and is respected by the public and other elected officials. Gains public support for the Library. Develops and encourages good staff/ community relationships. Deals well with the press. Is friendly, approachable, and fair when dealing with the public.

5. Overall Rating _____

Additional Comments:

President

This page intentionally blank

Evaluation Process - Genoa Public Library

I have attached the forms that we use. My Board and I created a new evaluation process and forms after doing some research a few years ago. The attached policy states the timeline that we use. There is also the eval form that every Board member and I fill out and send to the President. The President then compiles the ratings on the final eval form that is used in my evaluation meeting. There is also a document that the President fills out during the closed session the Board has to discuss my review before meeting with me. This form is used to document comments, concerns, etc and then is signed by all Board members and myself after meeting.

**Genoa Public Library
Board of Trustee Policy for
Annual Evaluation of Library Director**

The primary purpose of the Director Evaluation process is to provide the Director with a clear understanding of the Board's expectations; to ensure the Director is aware of how well the expectations are being met; to serve as a formal vehicle of communication between the Board and Director; to identify the Board's concerns, if any, so that appropriate action can be taken; and to demonstrate sound management practices and accountability to the community.

The Evaluation Calendar

The Board of Trustees will evaluate the Director annually. At the end of the previous evaluation, the Board will have approved the evaluation form for the next cycle. The evaluation will be based on the Director's job description, that year's Director goals, and/or other criteria decided by the Board in conjunction with the Director at the start of the year being evaluated. The evaluation process will consist of three parts: (1) a written evaluation, (2) a formal review session by the Board conducted at a regularly scheduled Board meeting in closed session, and (3) a performance review session between the Board President/designee and Director at a mutually agreed upon time before the end of the fiscal year.

The ideal timeline for the process of evaluation is as follows:

- 1) The Library Director will present the Working Budget for the next fiscal year at the May Board meeting. At the same meeting, the Library Director will prepare and hand out to the Board members a copy of the Library Director Evaluation form and a self-addressed stamped envelope for Board members to fill out and return to the Board President/designee by June 1.
- 2) Between the May and June Board meetings, the Library Director will conduct staff annual reviews and prepare a salary recommendations report.
- 3) The Board President/designee will compile Library Director Evaluation results for closed session discussion at June Board meeting.
- 4) At the June Board meeting, the Library Director will present staff salary recommendations to the Board for approval. At the same meeting, the Board will meet in closed session to discuss the Library Director evaluation and salary recommendation.
- 5) By June 30th, the Board President/designee will meet with the Library Director to review the Library Director Evaluation.

GENOA PUBLIC LIBRARY
DIRECTOR EVALUATION

| | <u>Rating Scale</u> | | | | |
|--|--------------------------|------------------------|----------------------------|------------------------|-------------------------|
| | Performs Unacceptably | Performs Marginally | Performs Satisfactorily | Performs High Level | Performs Outstanding |
| 1 | 2 | 3 | 4 | 5 | |
| 1) Provides Library Board Members with necessary information for decision making in the following areas: | 1 | 2 | 3 | 4 | 5 |
| a) Budget | 1 | 2 | 3 | 4 | 5 |
| b) Personnel | 1 | 2 | 3 | 4 | 5 |
| c) Facilities | 1 | 2 | 3 | 4 | 5 |
| d) Procedures/Policies | 1 | 2 | 3 | 4 | 5 |
| e) Technology | 1 | 2 | 3 | 4 | 5 |
| f) Contracts and Services | 1 | 2 | 3 | 4 | 5 |

Comments:

- 2) Promotes professional image to public.

| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|
|---|---|---|---|---|

Comments:

- 3) Works cooperatively with Library Board.

| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|
|---|---|---|---|---|

Comments:

- 4) Provides feedback to Library Board on areas of concern.

| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|
|---|---|---|---|---|

Comments:

- 5) Provides and promotes staff development.

| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|
|---|---|---|---|---|

Comments:

6) Takes initiative to identify new or expanded:

- a) Service needs
- b) Staff needs
- c) Facility needs

| | | | | |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
| 1 | 2 | 3 | 4 | 5 |
| 1 | 2 | 3 | 4 | 5 |

Comments:

7) Participates in meetings and continuing education opportunities.

| | | | | |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

Comments:

8) Personality and behavior traits:

- a) Cooperative attitude
- b) Communicates well
- c) Takes initiative
- d) Shows enthusiasm for work

| | | | | |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
| 1 | 2 | 3 | 4 | 5 |
| 1 | 2 | 3 | 4 | 5 |
| 1 | 2 | 3 | 4 | 5 |

Comments:

9) Has completed the responsibilities and duties as outlined in the Library Director's Position Description.

| | | | | |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

Comments:

Date: _____

Board President signature: _____

Director signature: _____

The signature of the employee may not indicate agreement; it only indicates that the evaluation was discussed with the employee.

Library Director Performance Review Form

Name: _____

Period of Review: From _____ To _____

Review of Position Description? Yes _____ No _____

Does the review result in revisions? Yes _____ No _____

Board's

Comments: _____

The Performance Review has been completed and will be reviewed with the Director.

Board President signature: _____ Date: _____

Vice-President signature: _____ Date: _____

Secretary signature: _____ Date: _____

Treasurer signature: _____ Date: _____

Trustee signature: _____ Date: _____

Trustee signature: _____ Date: _____

Trustee signature: _____ Date: _____

Date of Performance Review: _____

Director's

Comments: _____

This Performance Review Form has been reviewed with me and I have a copy. My signature may not indicate agreement; it only indicates that the review form was discussed with me.

Director signature: _____ Date: _____

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Evaluation Process - LaGrange Public Library

1 month prior to the review, board members are sent a form to complete evaluating the director. They get two weeks to complete it and send to the board president, who then compiles it and shares it with the director.

Meanwhile, the director writes up a self-evaluation and goals. She incorporates the feedback received from the board, and sends it to them with the monthly board packet, two days in advance of the meeting.

During the director's review (in executive session), the director presents accomplishments and goals. The board has an opportunity to ask questions and give feedback. They also discuss the goals and make sure that they are in agreement with the director, or make adjustments.

The director is then asked to leave the room while the board discusses compensation. (Other feedback is also sometimes discussed.)

The board president will orally share what was decided and any additional feedback with the director in the next few days. The president also writes this information up in a letter for the director's personnel file.



BOARD EVALUATION OF DIRECTOR **PART I**

- 3 Exceeds Expectations: Director has gone beyond what you would expect.
- 2 Meets Expectations: Director meets all or most of what you expect.
- 1 Does Not Meet Expectations: Director is not working at a level acceptable to you.
- 0 No Information: You have not had an opportunity to observe these behaviors.

Category 1: Organizational Leadership

| | | |
|-----------------------------|----------------------------|--|
| | | Competency Description <ul style="list-style-type: none">• Understands and implements the mission of the library.• Works as an advocate for the library before government, customers, the community and the general public.• Stays current with new ideas and trends among libraries.• Effective decision maker: gathers input, makes timely decisions and communicates results.• Proactive problem solver.• Articulates a guiding vision. |
| 3 | Exceeds Expectations | |
| 2 | Meets Expectations | |
| 1 | Does Not Meet Expectations | |
| 0 | No Information | |
| Behavioral Evidence: | | |

Category 2: Relationship with the Board

| | | |
|-----------------------------|----------------------------|--|
| | | Competency Description <ul style="list-style-type: none">• Keeps board members Informed about Issues, needs and operation of this library.• Offers direction to the board when needed on issues requiring board action and makes appropriate recommendations based on thorough study and analysis.• Interprets the intent of and executes board policy.• Seeks and accepts from the board, constructive criticism of work.• Supports board policy and actions to staff, customers and the public.• Understands his/her role in administration of board policy. |
| 3 | Exceeds Expectations | |
| 2 | Meets Expectations | |
| 1 | Does Not Meet Expectations | |
| 0 | No Information | |
| Behavioral Evidence: | | |



Category 3: Business and Financial Management

| | | |
|-----------------------------|----------------------------|--|
| 3 | Exceeds Expectations | Competency Description |
| 2 | Meets Expectations | <ul style="list-style-type: none">• Keeps informed about financial needs of the library. |
| 1 | Does Not Meet Expectations | <ul style="list-style-type: none">• Understands and supervises the financial accounting programs for the library. |
| 0 | No Information | <ul style="list-style-type: none">• Ensures that library funds are spent appropriately, always in the best interest of those we serve.• Provides the board accurate, understandable information about the financial status of the library through regular financial reports.• Makes well-supported budgeting recommendations to the board.• Assists the board in keeping the library financially sound.• Explores and proposes to the board new potential sources of finance for programs and services.• Plans and organizes work effectively.• Ensures that all governmental and legal requirements of the library are met. |
| Behavioral Evidence: | | |

Category 4: Customer Service

| | | |
|-----------------------------|----------------------------|---|
| 3 | Exceeds Expectations | Competency Description |
| 2 | Meets Expectations | <ul style="list-style-type: none">• Understands the needs of the library's customers and community and seeks to fill those needs with the organization's programs and community services. |
| 1 | Does Not Meet Expectations | <ul style="list-style-type: none">• Gains respect and support of other persons and organizations that come in contact with our library. |
| 0 | No Information | <ul style="list-style-type: none">• Articulates clear vision to staff about the paramount importance of customer service and models best practices behavior. |
| Behavioral Evidence: | | |



LAGRANGE
PUBLIC LIBRARY

Category 5: Personal Characteristics that Impact Job Performance

| | | |
|----------|----------------------------|--|
| 3 | Exceeds Expectations | Competency Description <ul style="list-style-type: none">Maintains high standards of ethics, honesty and integrity in personal and professional relationships.Works well with individuals and groups.Exercises good judgment in arriving at decisions.Maintains poise and emotional stability in the full range of professional activities.Writes clearly and concisely.Responds well when faced with unexpected/disturbing situations.Remains open to ideas, suggestions and criticism from the board. |
| 2 | Meets Expectations | |
| 1 | Does Not Meet Expectations | |
| 0 | No Information | |

Behavioral Evidence:

Category 6: Personnel Management and Development

| | | |
|----------|----------------------------|--|
| 3 | Exceeds Expectations | Competency Description <ul style="list-style-type: none">Justifies the need for staff development funds, actively campaigns for them and accounts for their use.Analyzes staff functioning periodically with the object of combining, eliminating and/or creating new positions.Emphasizes equal opportunity employment and affirmative action hiring practices.Delegates authority and efficiently organizes the work of personnel.Inspires staff to do their best work by acting as supporter and motivator; providing necessary resources, encouragement and appreciation.Addresses performance issues and takes actions necessary to correct problems, both with staff and his/herself.Willingness to assess and address poor and mediocre performance in a direct and fair manner. |
| 2 | Meets Expectations | |
| 1 | Does Not Meet Expectations | |
| 0 | No Information | |

Behavioral Evidence:



LA GRANGE
PUBLIC LIBRARY

Category 7: Planning and Problem Solving

| | | |
|----------|----------------------------|---|
| 3 | Exceeds Expectations | Competency Description <ul style="list-style-type: none">Establishes strategic goals that enable the library to better serve the community and anticipate future needs.Creates a vision that keeps the library on the cutting edge in technology, programming and services.Establishes clear long and short term objectives that are attainable and promote betterment of the library. |
| 2 | Meets Expectations | |
| 1 | Does Not Meet Expectations | |
| 0 | No Information | |

Behavioral Evidence:

Category 8: Interpersonal Effectiveness

| | | |
|----------|----------------------------|--|
| 3 | Exceeds Expectations | Competency Description <ul style="list-style-type: none">Establishes rapport and maintains productive relationships with subordinates, board, customers and community.Handles differences openly, candidly and constructively with the best interests of the library in mind.Seeks input from others; creates a collegial atmosphere where ideas and information are easily exchanged.Willingly accepts responsibility for actions and eagerly gives credit to staff.Creates strong, collaborative work groups focused on attaining superior results.Encourages a culture of open communication. |
| 2 | Meets Expectations | |
| 1 | Does Not Meet Expectations | |
| 0 | No Information | |

Behavioral Evidence:



LA GRANGE
PUBLIC LIBRARY

Category 9: Innovation/Improvement

| | | 3 Exceeds Expectations | Competency Description |
|-----------------------------|--|-------------------------------------|---|
| | | 2 Meets Expectations | <ul style="list-style-type: none">• Seeks out and promotes change that will better serve patrons and the community. |
| | | 1 Does Not Meet Expectations | <ul style="list-style-type: none">• Regularly proposes new ideas to the board for better service to customers and the community. |
| | | 0 No Information | <ul style="list-style-type: none">• Seeks advanced training to improve job skills.• Constantly pushes to improve efficiency & effectiveness.• Demonstrates concern about quality and getting better results.• Functions well in fast-paced, changing environment.• Anticipates change and develops appropriate coping strategies.• Actively works on personal development; seeks out feedback on how to improve.• Responds effectively and proactively to library/organizational changes.• Accomplishes responsibilities with superior outcomes.• Demonstrates resolve and urgency to get things done.• Commits to reach timely and successful closure on work.• Strong work ethic; does whatever it takes to get the job done.• Drives to excel in all matters. |
| Behavioral Evidence: | | | |



PART II

Describe 3-5 areas where performance is particularly effective:

- 1.
- 2.
- 3.
- 4.
- 5.

Describe 3-5 areas where performance could be more effective:

- 1.
- 2.
- 3.
- 4.
- 5.

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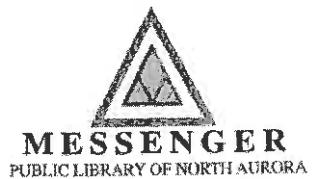
Messenger Library of North Aurora – Evaluation process

The Library Board President and Secretary distribute a copy of the form and the job description at the March Board meeting. Each Trustee then completes the form between the March and April Board Meeting.

The Board then meets in closed session in April to review each of the scores and comments and an average or consensus is formed on the numerical score for each area. An over all numerical score is compiled. Then a percentage salary increase is discussed during the Closed session and then voted upon in open session.

The Board Secretary and President then meet to compile the comments and record the score on to one form.

The Board President then meets with me toward the end of April / early May to go over the evaluation and to see if I have any questions.



Messenger Public Library of North Aurora

Library Administrator Evaluation

Date _____ Period Reviewed _____

Purpose: The primary purpose of the Administrator Evaluation process is to provide feedback so that the Administrator may better fulfill his/her responsibilities. This system promotes a two-way process that encourages stronger relationships between the Administrator, his/her staff, and the Board of Trustees, as well as the Administrator's ability to accomplish the identified goals.

Rating scale

Explanation of Ratings

1. Unacceptable/needs substantial improvement
2. Marginal/minimally acceptable
3. Competent/meets expectations
4. commendable/frequently exceeds expectations
5. Outstanding/far exceeds expectations
- U. Unknown/unable to evaluate

Administration/Priorities

Rating _____

- A. Plans and coordinates library services and operations
- B. Oversees the selection, ordering and maintenance of all library equipment
- C. Develops, implements and monitors library procedure
- D. Plans, implements and monitors the Library Long Range Plan

Kudos, comments, concerns, questions and/or suggested goals can be added to these boxes by Trustees.

Board Relations**Rating** _____

- A. Assists the Board in making and updating policies, plans and objectives
- B. Prepares appropriate reports for the Board meetings
- C. Apprises the Board of present and future needs
- D. Implements Board policies appropriately
- E. Conducts new member orientation and assists trustees in their growth and development
- F. Participates in all Board and Committee meetings
- G. Communicates effectively with Board Members

Kudos, comments, concerns, questions and/or suggested goals

Budget Management**Rating** _____

- A. Annual budget is well prepared
- B. Budget covers necessary expenses and funds are effectively allocated
- C. Funds are reserved for unanticipated contingencies and future needs
- D. Maintains accurate and up-to date records showing the status of library finances

Kudos, comments, concerns, questions and/or suggested goals

Collection Management**Rating** _____

- A. Maintains a timely and efficient collection development policy
- B. Selection and weeding policies are systematically implemented
- C. Oversees development of the library collection according to the needs and interests of the user
- D. Oversees the cataloging and classification of the collection

Kudos, comments, concerns, questions and/or suggested goals

Facilities Management**Rating** _____

- A. Oversees care and maintenance of the library building and grounds

Kudos, comments, concerns, questions and/or suggested goals

Professional Development, Management and Skills**Rating** _____

- A. Keeps current with knowledge, skills and trends relevant to public libraries and librarianship in general
- B. Ensures compliance with all laws relating to public libraries
- C. Displays initiative and leadership
- D. Implements change in an effective manner
- E. Demonstrates a strong personal commitment to public library services

Kudos, comments, concerns, questions and/or suggested goals

Public and Community Services/Relations**Rating** _____

- A. Serves as liaison to the community
- B. Effectively communicates library services to the public
- C. Responds to public inquiries and complaints

Kudos, comments, concerns, questions and/or suggested goals

Staff Management**Rating** _____

- A. Staffing vacancies and changes are resolved expediently
- B. Library staff is well qualified, effective and personable
- C. Positive management /staff relations are maintained
- D. Holds employees accountable to their job descriptions and goals
- E. Teamwork is utilized to provide adequate service to the public

Kudos, comments, concerns, questions and/or suggested goals

Overall Rating _____

I have reviewed the attached evaluation and discussed it with the Library Board President. My signature means that I have been advised of my performance status but does not necessarily imply that I agree or disagree with the evaluation.

Administrator's Comments (if any)

Salary Adjustment _____

Library Administrator's Signature _____

Board President's Signature _____

GRAYSLAKE AREA PUBLIC LIBRARY DISTRICT LIBRARY DIRECTOR EVALUATION FORM

| | | | |
|--------------------|--------|----------------|--------------|
| Name of Employee | | | |
| Title | | | |
| Period Covered | | | |
| Type of Evaluation | Annual | Initial 90 Day | Probationary |
| Date of Evaluation | | | |
| Name of Evaluator | | | |

| Rating Scale | Outstanding | Commendable | Satisfactory | Does Not Meet Expectations |
|--------------|-------------|--------------|--------------|----------------------------|
| Point Scale | 2.8-3.0 | 2.00 to 2.70 | 1.0 to 1.80 | .00 to 0.70 |

Points can be assigned in increments of one-tenth

| Library Director | |
|------------------|------|
| Total Points | 0.00 |
| Average Points | 0.00 |

| Final Rating | Outstanding | Commendable | Satisfactory | Does Not Meet Expectations |
|----------------|-------------|-------------|--------------|----------------------------|
| Average Points | 2.80-3.00 | 1.80-2.79 | 0.80-1.79 | 0.79 or under |
| | | | | 0 |

| Ethics - Meets Expectations | Ethics - Does Not Meet Expectations | Comments |
|---|---|----------|
| Performs job with integrity and in an ethical manner; follows all laws, policies and procedures relating to their position; avoids conflicts of interest or the appearance of conflict of interest; puts institutional values and goals ahead of personal ones while at work; exhibits intellectual honesty in all aspects of work including decision making, statistical reporting, and performance of all duties. | Knowingly fails to perform job with integrity and in an ethical manner; knowingly fails to follows laws, policies or procedures relating to their position; knowingly fails to avoid conflicts of interest or the appearance of conflict of interest; knowingly fails to put institutional values and goals ahead of personal ones while at work; knowingly fails to exhibit intellectual honesty in all aspects of work including decision making, statistical reporting, and performance of all duties. | |

| Library Director | Score | Comments |
|-----------------------------------|--------------|-----------------|
| Adaptability | 0.00 | 0 |
| Attendance / Punctuality | 0.00 | 0 |
| Service Focus | 0.00 | 0 |
| Communication With Staff | 0.00 | 0 |
| Communication From Board to Staff | 0.00 | 0 |
| Communication With Patrons | 0.00 | 0 |
| Communicatino with Community | 0.00 | 0 |
| Decision Making | 0.00 | 0 |
| Safety | 0.00 | 0 |
| Personal Appearance | 0.00 | 0 |
| Technology | 0.00 | 0 |
| Delegation | 0.00 | 0 |
| Supervision | 0.00 | 0 |
| Personnel Management (1) | 0.00 | 0 |
| Personnel Management (2) | 0.00 | 0 |
| Fiscal responsibility | 0.00 | 0 |
| Growth | 0.00 | 0 |
| Strategic Planning and Organizing | 0.00 | 0 |
| Leadership | 0.00 | 0 |
| Administration (1) | 0.00 | 0 |
| Administration (2) | 0.00 | 0 |
| Administration (3) | 0.00 | 0 |
| Employee Development (1) | 0.00 | 0 |
| Goal Attainment | 0.00 | 0 |
| Personnel Hiring | 0.00 | 0 |
| TOTAL POINTS | 0.00 | |
| AVERAGE | 0.00 | |

| | |
|--|--|
| Accomplishments Last Year | |
| Comments: | |
| Library Director's Strengths | |
| Comments: | |
| Opportunities for Development and Improvement | |
| Comments: | |
| Additional Trustee's Comments | |
| Comments: | |

| | | |
|---|--------------------------|-------------------------------------|
| Employee's Comments | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| I agree with this Rating | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Comments: | | |
| <p>I acknowledge that I have read this evaluation and have been given an opportunity to discuss it with my supervisor. My signature does not mean I agree with this evaluation.</p> | | |
| Library Director's Signature | Date | |
| Board President's Signature | Date | |

LIBRARY DIRECTOR

| | | | |
|---|--|---|---|
| Adaptability - Adjusts to changing situations, learns new and different techniques or positions, responds appropriately to suggestions for work improvement. | | | |
| Score | Outstanding (2.80-3.00) | Commendable (1.80-2.70) | Satisfactory (0.80-1.70) |
| | Embraces changing situations and encourages others; readily learns new and different techniques or positions and assists others in learning; seeks suggestions for work improvement. | Readily adjusts to changing situations; readily learns new and different techniques or positions, welcomes suggestions for work improvement. | Adjusts to changing situations, learns new and different techniques or positions; responds appropriately to suggestions for work improvement. |
| Attendance / Punctuality - Maintains acceptable attendance record, works as scheduled. | | | |
| Score | Outstanding (2.80-3.00) | Commendable (1.80-2.70) | Satisfactory (0.80-1.70) |
| | Is never late for desk coverage; is never late for shift; always notifies supervisor as soon as absences are planned, typically at least four weeks in advance. | Is never late for desk coverage; is never more than 10 minutes late for shift, always notifies supervisor at least two weeks before planned absences, calls in sick more than four hours before shift or calls their Department Head at home by 7:30 a.m. | Is rarely late for desk coverage; is rarely late for shift and calls to let supervisor know of late arrival; always notifies supervisor at least one week before planned absences, calls in sick at least four hours before shift or calls their Department Head at home by 7:30 a.m. |
| Does Not Meet Expectations (0-0.70) | | | |
| | | | Has difficulty adjusting to changing situations; resists learning new and different techniques or positions; responds negatively to suggestions for work improvement. |
| Does Not Meet Expectations (0-0.70) | | | |
| | | | Is generally late for desk coverage; is generally late for shift and does not call to let supervisor know of late arrival; generally does not notify supervisor at least one week before planned absences. |

| Service Focus - Values the importance of delivering high quality service to patrons; understands the needs of the patron; projects a courteous manner. | | | | |
|--|---|---|--|---|
| Score | Outstanding (2.80-3.00) | Commendable (1.80-2.70) | Satisfactory (0.80-1.70) | Does Not Meet Expectations (0-0.70) |
| | Exemplifies the importance of delivering high quality service to patrons; consistently suggests new ways to improve service and readily implements authorized service improvements; understands the needs of the patron; projects an unfailingly friendly and courteous manner. | Serves as an example of the importance of delivering high quality service to patrons; readily implements authorized service improvements; understands the needs of the patron; frequently projects a courteous manner. | Demonstrates the importance of delivering high quality service to patrons; implements authorized service improvements; makes an effort to understand the needs of the patron; generally projects a courteous manner. | Rarely appears to value the importance of delivering high quality service to patrons; rarely makes an effort to understand the needs of the patron; projects a less-than courteous manner. |
| Communication With Board - Expresses ideas clearly both orally and in writing; listens well and responds appropriately; provides relevant and timely information to staff; responds immediately to email and print communication. | | | | |
| Score | Outstanding (2.80-3.00) | Commendable (1.80-2.70) | Satisfactory (0.80-1.70) | Does Not Meet Expectations (0-0.70) |
| | Consistently expresses ideas clearly and succinctly both orally and in writing; listens well and responds appropriately; provides relevant and timely information to staff; responds immediately to email and print communication. | Frequently expresses ideas clearly and succinctly both orally and in writing; frequently listens well and responds appropriately; provides relevant and timely information to staff; responds by the end of the day to email and print communication. | Generally expresses ideas clearly and succinctly both orally and in writing; usually listens well and responds appropriately; generally provides relevant and timely information to staff; responds no later than their next shift to email and print communication. | Does not express ideas clearly or succinctly orally and/or in writing; given to frequent interruption, often jumps to conclusions; often fails to provide relevant and timely information to staff; needs to be prompted to check and respond to email and print communication. |

LIBRARY DIRECTOR

| Communication From Staff to Board - Expresses ideas clearly both orally and in writing; listens well and responds appropriately; provides relevant and timely information from the Staff to the Board of Trustees. | | | |
|---|--|--|---|
| Score | Outstanding (2.80-3.00) | Commendable (1.80-2.70) | Satisfactory (0.80-1.70) |
| | Consistently communicates appropriate staff ideas and concerns to the Board of Trustees in a timely manner; expresses ideas clearly and succinctly both orally and in writing; listens well and responds appropriately; responds immediately to email and print communication. | Frequently communicates appropriate staff ideas and concerns to the Board of Trustees in a timely manner; expresses ideas clearly and succinctly both orally and in writing; listens well and responds appropriately; responds by the end of the day to email and print communication. | Generally communicates appropriate staff ideas and concerns to the Board of Trustees in a timely manner; expresses ideas clearly and succinctly both orally and in writing; listens well and responds appropriately; responds no later than their next shift to email and print communication. |
| Score | Outstanding (2.80-3.00) | Commendable (1.80-2.70) | Does Not Meet Expectations (0-0.70) |
| | Consistently interacts with patrons in a respectful manner; listens well and responds appropriately; provides relevant and timely information to patrons; responds immediately to email and print communication. | Frequently interacts with patrons in a respectful manner; listens well and responds appropriately; provides relevant and timely information to patrons; responds by the end of the day to email and print communication. | Does not communicate appropriate staff ideas and concerns to the Board of Trustees in a timely manner; does not express ideas clearly or succinctly orally and/or in writing; given to frequent interruption, often jumps to conclusions; needs to be prompted to check and respond to email and print communication. |

| Communication With Patrons - Interacts with patrons in a respectful manner; listens well and responds appropriately; provides relevant and timely information to patrons; responds to email and print communication in a timely manner. | | | |
|--|--|--|--|
| Score | Outstanding (2.80-3.00) | Commendable (1.80-2.70) | Satisfactory (0.80-1.70) |
| | Consistently interacts with patrons in a respectful manner; listens well and responds appropriately; provides relevant and timely information to patrons; responds immediately to email and print communication. | Frequently interacts with patrons in a respectful manner; listens well and responds appropriately; provides relevant and timely information to patrons; responds by the end of the day to email and print communication. | Generally interacts with patrons in a respectful manner; listens well and responds appropriately; provides relevant and timely information to patrons; responds no later than their next shift to email and print communication. |
| Score | Outstanding (2.80-3.00) | Commendable (1.80-2.70) | Does Not Meet Expectations (0-0.70) |
| | Consistently interacts with patrons in a respectful manner; listens well and responds appropriately; provides relevant and timely information to patrons; responds immediately to email and print communication. | Frequently interacts with patrons in a respectful manner; listens well and responds appropriately; provides relevant and timely information to patrons; responds by the end of the day to email and print communication. | Does not interact with patrons in a respectful manner; listens well and responds appropriately; provides relevant and timely information to patrons; needs to be prompted to check and respond to email and print communication. |

LIBRARY DIRECTOR

| Communication With the Community - Effectively represents the Library to the community, communicates and interacts within the community on behalf of the library | | | | | |
|--|--|---|---|--|----------|
| Score | Outstanding (2.80-3.00) | Commendable (1.80-2.70) | Satisfactory (0.80-1.70) | Does Not Meet Expectations (0-0.70) | Comments |
| | Consistently represents and promotes the library effectively with community representatives; consistently communicates and interacts effectively within the community. | Frequently represents and promotes the library effectively with community representatives; frequently communicates and interacts effectively within the community. | Generally represents and promotes the library effectively with community representatives; generally communicates and interacts effectively within the community. | Does not represent and promote the library effectively with community representatives; does not communicate and interact effectively within the community. | |
| | Decision Making - Uses logic to distinguish relevant from irrelevant information; acts with integrity in decision-making; makes timely decisions and follows through appropriately. | | | | |
| Score | Outstanding (2.80-3.00) | Commendable (1.80-2.70) | Satisfactory (0.80-1.70) | Does Not Meet Expectations (0-0.70) | Comments |
| | Consistently uses logic to distinguish relevant from irrelevant information; consistently acts with integrity in decision-making; consistently makes clear and transparent decisions; consistently makes timely decisions and follows through appropriately. | Frequently uses logic to distinguish relevant from irrelevant information; frequently acts with integrity indecision-making; frequently makes clear and transparent decisions; frequently makes timely decisions and follows through appropriately. | Generally uses logic to distinguish relevant from irrelevant information; generally acts with integrity indecision-making; generally makes clear and transparent decisions; generally makes timely decisions and follows through appropriately. | Uses emotion to make decisions more often than uses logic, acts with little integrity in decision-making; generally does not distinguish relevant from irrelevant information; finds it difficult to make decisions. | |

| | | | |
|---|--|--|--|
| Safety - Work habits and attitudes show concern for safety; maintains awareness of surroundings and reports unsafe conditions immediately. | | | |
| Score | Outstanding (2.80-3.00) | Commendable (1.80-2.70) | Satisfactory (0.80-1.70) |
| | Consistently takes initiative to recommend safety and security improvements; work habits and attitudes show strong concern for safety; maintains awareness of surroundings; immediately reports potentially unsafe conditions. | frequently takes initiative to recommend safety and security improvements; work habits and attitudes show concern for safety; maintains awareness of surroundings and immediately reports potentially unsafe conditions. | Work habits and attitudes show concern for safety; maintains awareness of surroundings and immediately reports unsafe conditions and responds appropriately. |
| Personal Appearance - Is well-groomed; wears appropriate attire; presents a professional demeanor; maintains neat and clean appearance. | | | |
| Score | Outstanding (2.80-3.00) | Commendable (1.80-2.70) | Satisfactory (0.80-1.70) |
| | Is consistently exceptionally well-groomed; always wears appropriate workplace attire; always presents a professional demeanor. | Is consistently well-groomed; always wears appropriate workplace attire; always presents a professional demeanor. | Is generally well-groomed; wears appropriate workplace attire; generally presents a professional demeanor. |

LIBRARY DIRECTOR

| Technology - Maintains awareness of evolving technologies pertinent to Library operation; understands and knows how to effectively use the equipment and software required for the position; shows willingness to learn new equipment and software; can demonstrate and explain to others how to use the core equipment and software required for the position. | | | | |
|--|---|--|---|--|
| Score | Outstanding (2.80-3.00) | Commendable (1.80-2.70) | Satisfactory (0.80-1.70) | Does Not Meet Expectations (0-0.70) |
| | Consistently maintains awareness of evolving technologies pertinent to Library operation, thoroughly understands and knows how to effectively use equipment and software required for the position; investigates and recommends new technology to Department Head; offers to demonstrate and explain to others how to use the equipment and software required for the position. | Frequently maintains awareness of evolving technologies pertinent to Library operation; understands and knows how to effectively use all equipment and software required for the position; shows willingness to learn new equipment and software; can demonstrate and explain to others how to use all the equipment and software required for the position. | Generally maintains awareness of evolving technologies pertinent to Library operation; understands and knows how to effectively use the core equipment and software required for the position; shows willingness to learn new equipment and software; can demonstrate and explain to others how to use the core equipment and software required for the position. | Does not maintain awareness of evolving technologies pertinent to Library operation; does not understand or know how to effectively use the equipment and software required for the position; does not show willingness to learn new equipment and software; can not demonstrate and explain to others how to use the core equipment and software required for the position. |

LIBRARY DIRECTOR

| Delegation - Demonstrates ability to direct others in accomplishing work; clearly communicates expectations; develops and maintains knowledge of subordinates' strengths and weaknesses; assists subordinates in accomplishing work-related objectives. | | | |
|---|--|--|--|
| Score | Outstanding (2.80-3.00) | Commendable (1.80-2.70) | Satisfactory (0.80-1.70) |
| | | | Does Not Meet Expectations (0-0.70) |
| | Consistently demonstrates ability to direct others in accomplishing work; consistently clearly communicates expectations; consistently develops and maintains knowledge of subordinates' strengths and weaknesses; consistently provides subordinates with the resources needed to accomplish work-related objectives. | Frequently demonstrates ability to direct others in accomplishing work; frequently clearly communicates expectations; frequently develops and maintains knowledge of subordinates' strengths and weaknesses; frequently provides subordinates with the resources needed to accomplish work-related objectives. | Generally demonstrates ability to direct others in accomplishing work; generally clearly communicates expectations; generally develops and maintains knowledge of subordinates' strengths and weaknesses; generally provides subordinates with the resources needed to accomplish work-related objectives. |
| Personnel Management: Supervision - Requires performance of all duties; provides timely and appropriate feedback; applies personnel policies and procedures consistently; addresses personnel issues promptly and professionally. | | | |
| Score | Outstanding (3) | Commendable (2) | Satisfactory (1) |
| | Consistently requires performance of all duties; consistently provides timely and appropriate feedback; applies personnel policies and procedures consistently; consistently addresses personnel issues promptly and professionally. | Frequently requires performance of all duties; frequently provides timely and appropriate feedback; frequently applies personnel policies and procedures consistently; frequently addresses personnel issues promptly and professionally. | Generally requires performance of all duties; generally provides timely and appropriate feedback; generally applies personnel policies and procedures consistently; generally addresses personnel issues promptly and professionally. |
| | | | Does Not Meet Expectations (0) |
| | | | Fails to require performance of all duties; fails to provide timely and appropriate feedback; fails to apply personnel policies and procedures consistently; fails to address personnel issues promptly and professionally. |

LIBRARY DIRECTOR

Personnel Management: Performance Evaluations - Conducts performance evaluations in a fair and consistent manner; Is open-minded and considers comments during the performance evaluation process.

| Score | Outstanding (2.80-3.00) | Commendable (1.80-2.70) | Satisfactory (0.80-1.70) | Does Not Meet Expectations (0-0.70) | Comments |
|-------|--|--|--|--|----------|
| | Consistently conducts performance evaluations in a fair and consistent manner; frequently is open-minded and considers comments during the performance evaluation process. | Frequently conducts performance evaluations in a fair and consistent manner; frequently is open-minded and considers comments during the performance evaluation process. | Generally conducts performance evaluations in a fair and consistent manner; generally is open-minded and considers comments during the performance evaluation process. | Fails to conduct performance evaluations in a fair and consistent manner; fails to be open-minded and consider comments during the performance evaluation process. | |

LIBRARY DIRECTOR

| | | | | | |
|---|---|---|--|---|-----------------|
| Personnel Management: Staff Morale - Treats all staff fairly, without favoritism; fosters a positive work environment. | | | | | |
| Score | Outstanding (2.80-3.00) | Commendable (1.80-2.70) | Satisfactory (0.80-1.70) | Does Not Meet Expectations (0-0.70) | Comments |
| | Consistently treats all staff fairly, without favoritism; consistently fosters a positive work environment. | Frequently treats all staff fairly, without favoritism; frequently fosters a positive work environment. | Generally treats all staff fairly, without favoritism; generally fosters a positive work environment. | Fails to treat all staff fairly, without favoritism; fails to foster a positive work environment. | |
| Fiscal Responsibility - Prepares annual budget; plans appropriately for departmental needs; incorporating the Long Range Plan; controls costs and maximizes resources; manages spending patterns appropriately; tracks budget throughout the year. | | | | | |
| Score | Outstanding (3) | Commendable (2) | Satisfactory (1) | Does Not Meet Expectations (0) | Comments |
| | Consistently prepares annual budget; consistently plans appropriately for departmental needs, incorporating the Long Range Plan; consistently controls costs and maximizes resources; consistently manages spending patterns appropriately; consistently tracks budget throughout the year. | Frequently prepares annual budget; frequently plans appropriately for departmental needs, incorporating the Long Range Plan; frequently controls costs and maximizes resources; frequently manages spending patterns appropriately; frequently tracks budget throughout the year. | Generally prepares annual budget; generally plans appropriately for departmental needs, incorporating the Long Range Plan; generally controls costs and maximizes resources; generally manages spending patterns appropriately; generally tracks budget throughout the year. | Budget preparation requires excessive input by Library Director; does not plan appropriately for departmental needs, incorporating the Long Range Plan; does not effectively control cost and maximize resources; does not manage spending patterns appropriately; does not track budget throughout the year. | |

LIBRARY DIRECTOR

Growth - Fosters the innovation, development and implementation of new approaches; occasionally brings new ideas for library services in any department to Management Team for enlightenment and consideration.

| Score | Outstanding (2.80-3.00) | Commendable (1.80-2.70) | Satisfactory (0.80-1.70) | Does Not Meet Expectations (0-0.70) | Comments |
|-------|---|---|--|--|----------|
| | Consistently fosters the innovation, development and implementation of new approaches within the department and in collaboration with other departments; consistently brings new ideas for library services to Management Team for enlightenment and consideration. | Frequently fosters the innovation, development and implementation of new approaches within the department and in collaboration with other departments; frequently brings new ideas for library services to Management Team for enlightenment and consideration. | Generally fosters the innovation, development and implementation of new approaches in the department; occasionally brings new ideas for library services to Management Team for enlightenment and consideration. | Content with providing the same services year after year; rarely brings new ideas for library services to Management Team for enlightenment and consideration. | |
| | Strategic Planning and Organizing - evaluates all options; can see connections within complex issues; anticipates future needs. | | | | |
| Score | Outstanding (3) | Commendable (2) | Satisfactory (1) | Does Not Meet Expectations (0) | Comments |
| | Consistently understands the big picture and aligns priorities with broader goals; consistently solicits input from others for alternatives; consistently evaluates all options open-mindedly; consistently can see connections within complex issues; consistently anticipates future needs. | Frequently understands the big picture and aligns priorities with broader goals; frequently solicits input from others for alternatives; frequently evaluates all options open-mindedly; frequently can see connections within complex issues; frequently anticipates future needs. | Generally understands the big picture and aligns priorities with broader goals; generally solicits input from others for alternatives; generally evaluates all options open-mindedly; generally can see connections within complex issues; generally anticipates future needs. | Focuses on department and often fails to align departmental priorities with broader goals; superficially evaluates alternatives and input; often fails to see connections within complex issues; often fails to anticipate future needs. | |

LIBRARY DIRECTOR

| Leadership - Accepts responsibility for department's work; manager and their department gain respect and cooperation of department staff and other departments; inspires and motivates subordinates; effectively delegates and coordinates subordinates' work; directs departments toward common goal; promotes innovation and team effort throughout the library; conducts effective meetings. | | | |
|---|---|---|---|
| Score | Outstanding (2.80-3.00) | Commendable (1.80-2.70) | Satisfactory (0.80-1.70) |
| | | | Does Not Meet Expectations (0-0.70) |
| | Consistently accepts responsibility for department's work; manager and their department consistently gain respect and cooperation from department staff and other departments; consistently inspires and motivates subordinates; consistently effectively coordinates subordinates' work; directs department toward common goal; frequently promotes innovation and team effort throughout the library; frequently conducts effective meetings. | Frequently accepts responsibility for department's work; manager and their department frequently gain respect and cooperation of department staff and other departments; inspires and motivates subordinates; effectively coordinates subordinates' work; directs department toward common goal; frequently promotes innovation and team effort throughout the library; frequently conducts effective meetings. | Generally accepts responsibility for department's work; manager and their department generally gain respect and cooperation of department staff and other departments; inspires and motivates subordinates; effectively coordinates subordinates' work; directs department toward common goal; generally promotes innovation and team effort throughout the library; generally conducts effective meetings. |
| | | | Accepts insufficient responsibility for department's work; manager and their department gain insufficient respect and cooperation of department staff and other departments; fails to inspire and motivate subordinates; often fails to effectively coordinate subordinates' work; does not effectively direct department toward common goal; does not promote innovation and / or team effort throughout the library; fails to conduct effective meetings. |
| Administration - Manages time well; performs day-to-day administrative tasks in a timely manner; maintains appropriate contact with supervisor; effectively utilizes staff and other resources. | | | |
| Score | Outstanding (3) | Commendable (2) | Satisfactory (1) |
| | | | Does Not Meet Expectations (0) |
| | Consistently manages time well; consistently effectively utilizes staff and other resources; consistently ensures the physical facility is properly maintained. | Frequently manages time well; frequently effectively utilizes staff and other resources; frequently ensures the physical facility is properly maintained. | Generally manages time well; generally effectively utilizes staff and other resources; generally ensures the physical facility is properly maintained. |
| | | | Does not manage time well; often fails to effectively utilize staff and other resources fails to ensure the physical facility is properly maintained. |

LIBRARY DIRECTOR

| | | | | | |
|--|--------------------------------|--|---|--|-----------------|
| Administration: Collection Management - Ensures collection management adheres to the materials selection policy and meets the needs of our patrons. | | | | | |
| Score | Outstanding (2.80-3.00) | Commendable (1.80-2.70) | Satisfactory (0.80-1.70) | Does Not Meet Expectations (0-0.70) | Comments |
| Consistently ensures collection management adheres to the materials selection policy and meets the needs of our patrons. | | Generally ensures collection management adheres to the materials selection policy and meets the needs of our patrons. | Does not ensure collection management adheres to the materials selection policy and meets the needs of our patrons. | Does not ensure collection management adheres to the materials selection policy and meets the needs of our patrons. | |
| Administration: Legal Compliance - Maintains awareness of changes in laws and regulations affecting the Library; recommends policy changes to the Board; implements library policies. | | | | | |
| Score | Outstanding (2.80-3.00) | Commendable (1.80-2.70) | Satisfactory (0.80-1.70) | Does Not Meet Expectations (0-0.70) | Comments |
| Consistently maintains awareness of changes in laws and regulations affecting the Library; consistently recommends appropriate policy changes to the Board; consistently implements library policies. | | Frequently maintains awareness of changes in laws and regulations affecting the Library; frequently recommends appropriate policy changes to the Board; frequently implements library policies. | Generally maintains awareness of changes in laws and regulations affecting the Library; generally recommends appropriate policy changes to the Board; generally implements library policies. | Fails to maintain awareness of changes in laws and regulations affecting the Library; fails to recommend appropriate policy changes to the Board; fails to implement library policies. | |
| Employee Development - Provides employees with developmental opportunities through formal and informal training; instills, supports and encourages professional development; holds monthly all-staff meetings. | | | | | |
| Score | Outstanding (2.80-3.00) | Commendable (1.80-2.70) | Satisfactory (0.80-1.70) | Does Not Meet Expectations (0-0.70) | Comments |
| Consistently provides employees with developmental opportunities through formal and informal training and encourages them to seek out educational opportunities; consistently instills and supports professional development; consistently holds monthly all-staff meetings. | | Frequently provides employees with developmental opportunities through formal and informal training and encourages them to seek out educational opportunities; frequently instills and supports professional development; frequently holds monthly all-staff meetings. | Generally provides employees with developmental opportunities through formal and informal training; generally instills and supports professional development; generally holds monthly all-staff meetings. | Often fails to provide employees with developmental opportunities through formal and informal training; fails to instill and support professional development; fails to hold monthly all-staff meetings. | |

LIBRARY DIRECTOR

| Goal Attainment - Sets realistic and appropriate departmental goals based on the library's Long Range Plan; tracks progress towards goals; develops methods and manages resources to attain goals; deals effectively with unanticipated problems in attaining goals. | | | | | |
|--|--|--|--|---|----------|
| Score | Outstanding (2.80-3.00) | Commendable (1.80-2.70) | Satisfactory (0.80-1.70) | Does Not Meet Expectations (0-0.70) | Comments |
| | Consistently sets realistic and appropriate departmental goals based on the library's Long Range Plan; consistently tracks progress towards goals; consistently develops methods and manages resources to attain goals; consistently deals effectively with unanticipated problems in attaining goals. | Frequently sets realistic and appropriate departmental goals based on the library's Long Range Plan; frequently tracks progress towards goals; frequently develops methods and manages resources to attain goals; frequently deals effectively with unanticipated problems in attaining goals. | Generally sets realistic and appropriate departmental goals based on the library's Long Range Plan; generally tracks progress towards goals; generally develops methods and manages resources to attain goals; generally deals effectively with unanticipated problems in attaining goals. | Fails to set realistic and appropriate departmental goals based on the library's Long Range Plan; fails to track progress towards goals; fails to develop methods and manage resources to attain goals; fails to deal effectively with unanticipated problems in attaining goals. | |

LIBRARY DIRECTOR

| | | | |
|---|---|--|---|
| <p>Personnel Hiring - Implements the hiring process in a timely manner; Effectively selects and trains new staff; effectively determines status of employee prior to end of probationary period.</p> | | | |
| Score | Outstanding (2.80-3.00) | Commendable (1.80-2.70) | Satisfactory (0.80-1.70) |
| | <p>Posts job descriptions and ads within two weeks of written notification of an employee's termination; begins interviewing within a month of posting the position; completes preliminary interviews within three weeks; either makes an offer or re-advertises the position within a week of completing interviews; selects appropriate staff; provides excellent orientation and training of new staff by self or other staff; provides written feedback to employees at 30 and 60 days of probationary period; determines final status of employee one week prior to end of probationary period; discusses concerns with Library Director during probationary period.</p> | <p>Posts job descriptions and ads within two weeks of written notification of an employee's termination; begins interviewing within a month of posting the position; completes preliminary interviews within four weeks; either makes an offer or re-advertises the position within a week of completing interviews; selects appropriate staff; provides excellent orientation and training of new staff by self or other staff; provides verbal feedback to employees at 30 and 60 days of probationary period; determines final status of employee one week prior to end of probationary period; discusses concerns with Library Director during probationary period.</p> | <p>Posts job descriptions and ads within three weeks of written notification of an employee's termination; begins interviewing within four weeks of posting the position; completes preliminary interviews within four weeks; either makes an offer or re-advertises the position within a week of completing interviews; selects appropriate staff, provides adequate orientation and training of new staff by self or other staff; provides verbal feedback to employees at 45 and 60 days of probationary period; determines final status of employee one week prior to end of probationary period; discusses concerns with Library Director during probationary period.</p> |
| Does Not Meet Expectations (0-0.70) | | | |
| | | <p>Posts job descriptions and ads a month or more after written notification of an employee's termination; begins interviewing more than a month after posting position; takes a month or more to complete preliminary interviews; either makes an offer or re-advertises the position two weeks or more after completing interviews; selects appropriate staff, provides little orientation and training of new staff, relying heavily on other staff to do the training; provides little feedback to employees during the probationary period; determines final status of employee less than one week prior to end of probationary period; rarely discusses concerns with Library Director during probationary period.</p> | |
| TOTAL POINTS | #REF! | AVERAGE | #REF! |

Executive Director Performance Evaluation Form

As with any other employee evaluation, executive director evaluations should focus on both what the ED has achieved as well as how the ED operates. This sample evaluation form will help you do that.

The Executive Director Performance Review form consists of three parts:

1. The “what”: To what extent is the ED leading the organization to accomplish what it should be accomplishing? Is the ED leading the organization to deliver results in the short- and longer-term?
2. The “how”: To what extent is *how* the ED is leading consistent with our values, and our beliefs about what skills the ED needs in order to be effective?
3. The “what next”: Moving forward, what are the implications of this review in terms of ED tenure, areas in which the ED should continue performing well, and areas in which the ED should improve?

PART I: WHAT WAS ACHIEVED?

The board and ED should agree at the start of the year on the most important goals for the organization. The first section of the review focuses on the extent to which the organization achieved those goals. (In cases where unforeseen opportunities or challenges arose during the year that were not captured in the initial goals, they should be added here as well.)

PART II: HOW WAS IT ACHIEVED?

This section focuses on values that all employees are expected to demonstrate, and which the ED should model, as well as competencies that are key to the ED position in particular.

PART III: SUMMARY AND NEXT STEPS

This section summarizes performance for the year and identifies overall areas of strength, areas for improvement, and next steps.

The ED should fill this form out as a self-assessment, and then the board will use this form to complete the final evaluation, taking into account relevant data on the organization's progress against goals, as well input from the staff¹, fellow board members, and the ED's own self-evaluation.

¹ Often boards conduct surveys of staff, board members, and/or external constituents as part of the evaluation process. If you choose to do a survey, use that data as an important input to inform the evaluation, but do not substitute a survey for the evaluation itself.

TIMELINE

| Activity | Date | Notes |
|--|------|-------|
| ED drafts and submits self-evaluation, using attached form [Optional: Evaluation Committee solicits input from relevant stakeholders, via survey, confidential conversations, or other means] | | |
| Evaluation Committee ² considers inputs and drafts evaluation | | |
| Evaluation Committee sends draft evaluation to ED | | |
| ED and Evaluation Committee meet to discuss evaluation | | |
| Evaluation Committee makes any changes and submits evaluation to full board | | |
| Evaluation Committee discusses conclusions with board, which votes to approve (or, in rare cases, modify) and discusses any relevant next steps | | |

² Rather than using a separate Evaluation Committee, the board may instead wish to have the board chair and vice chair, or board Executive Committee, serve this role.

Evaluation

| | | | |
|-------------------------|-------------------------------|--------------------------------|--|
| Executive Director Name | | | |
| Review Period | | | |
| Date of Review | | | |
| Reviewed by | Self <input type="checkbox"/> | Board <input type="checkbox"/> | |

Use the following scale in completing the sections below:

Rating

- 4 Regularly exceeds expectations, exceptional, rare (**exemplary**)
- 3 Almost always meets expectations and sometimes exceeds them (**good**)
- 2 Sometimes meets expectations but needs improvement to fully satisfy them (**fair**)
- 1 Does not meet expectations, needs significant improvement (**unsatisfactory**)

PART I: ORGANIZATIONAL GOALS

In the space below, list the most important objectives for the organization for the period covered by the evaluation, and assess the extent to which the ED led the organization to meet those objectives.

| Goals | Result(s) | Rating |
|---|-----------|--------|
| <i>E.g., Increase public support for clean water bill to 55%.</i> ... | | |
| <i>Qualify three initiatives for state ballots, and win at least two.</i> | | |
| <i>Raise \$3,500,000.</i> | | |

| | | |
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| | | |

PART II: PERFORMANCE FACTORS

This section focuses on values that all employees are expected to demonstrate, and which the ED should model, as well as competencies and behaviors that are key to the ED position in particular.

| Core Values | Rating |
|---|--------|
| Persistence | |
| • Finds ways around obstacles and tries new approaches to get the job done | |
| Continuous improvement | |
| • Constantly learns from and improves in his or her work | |
| Decency | |
| • Treats others as he or she would want to be treated. | |
| Humility | |
| • Acknowledges what he or she does not know and approaches others with deep respect for the difficulty of their work. | |
| Integrity | |
| • Aligns his or her actions with his or her words and operates with transparency. | |
| Understanding of and commitment to [ORG's] mission | |
| • Strong commitment to organizational values and mission. | |
| ED-Specific Competencies | |
| Setting a vision for [ORG's] work | |
| • Ensures we adopt a clear, compelling vision for what the organization will accomplish and how. | |

| | |
|--|--|
| <ul style="list-style-type: none"> Builds commitment of board and staff to the vision. Ensures we adapt our vision to meet changing circumstances. | |
| Managing execution | |
| <ul style="list-style-type: none"> Spurs creation of well thought-through plans for implementing work. Ensures what happens on the ground actually reflects our plans. | |
| Building a strong organization | |
| <ul style="list-style-type: none"> Ensures [ORG] has the staffing it needs to reach its short- and longer-term goals. Ensures [ORG] works to retain top performers and is committed to letting low performers go quickly. Ensures [ORG] has a strong culture of performance and learning. | |
| External communication and relationship-building | |
| <ul style="list-style-type: none"> Builds and cultivates important high-level strategic relationships. Raises [ORG] visibility within our broader movement and elsewhere. Garners respect for [ORG] and our work (and not just for the ED personally). | |

Summary of strengths, areas needing improvement, and general comments on expectations and competencies:

PART III: SUMMARY OF PERFORMANCE

Overall rating (exemplary-4, good-3, fair-2, or unsatisfactory-1):

Summary of overall performance during the review period and next steps:

LIBRARY DIRECTOR – JOB DESCRIPTION

AREAS OF RESPONSIBILITY

OVERVIEW

The position of Director is the Chief Administrative Officer of the Warrenville Public Library District. The Director reports directly to the Board of Trustees and implements its policy and programs. The Director is generally responsible for all library functions. The Director plans, organizes, and directs all its operations and supervises all its employees, directly or indirectly.

Due to the nature of this salaried, exempt position, specific duties are not enumerated in its description. Broad areas of responsibility are listed, together with examples of specific responsibilities. These examples are not all-inclusive. The Director is expected to exercise discretion in determining those activities necessary to successfully achieve library objectives.

I. BOARD INTERACTION

A. Library Policies

1. Carry out existing policies.
2. Encourage regular policy review and recommend policy additions and changes.

B. Communications

1. Attend Board and Committee meetings.
2. Provide monthly and annual reports.
3. Prepare reports required of the Library District by the State Librarian and other governing bodies.
4. Share highlights of staff meetings.
5. Work with Board chair to establish Board Meeting Agenda and provide backup information for the agenda (Board Meeting Agenda).
6. Provide prompt notification of occurrences which may require Board action.

II. STAFF INTERACTION/PERSONNEL MANAGEMENT

A. Staff Selection and Utilization

Within the context of the Principles of Professionalism:

1. Develop organization plans and job descriptions.
2. Select qualified personnel for defined jobs.
3. Develop and install appropriate work procedures.
4. Work with staff to develop individual job performance objectives and provide training for effective job performance.
5. Evaluate job performance.
6. Maintain an individual file on every employee to include all information necessary to support job evaluations.

B. Staff Professionalism

Aggressively support and promote Principles of Professionalism

1. Foster high standards of public service.
2. Foster high standards of professional ethics.
3. Foster effective staff inter-personal relationships.
4. Obtain staff input for improved operations.
5. Keep staff members informed of developments through staff meetings and other ways as appropriate.

C. Staff Professional Development

Provide an on-going program of in-service training

1. Partnering with the Board, set Director's personal performance objectives as the basis for annual evaluation.
2. Encourage continued professional education.
3. Train staff on setting individual performance and professional growth objectives.
4. Encourage participation in professional organizations.
5. Train staff in participatory management.

III. INTERACTION WITH OTHERS/PUBLIC AND PROFESSIONAL RELATIONS

A. Community Relations

Create and maintain an active professional "presence" in the community.

1. Maintain cooperative relations with other governmental bodies, with community agencies, and schools with the supervision and approval of the Board of Trustees.
2. Direct public relations activities of the Library.
3. Initiate news releases and respond to inquiries by newspapers, and others, with information, when possible positive and favorable to the library and its use by the community.
4. Encourage an active Friends organization.

B. Inter-Library Relations

1. Direct effective utilization of the Library System and cooperative activities with other libraries.
2. Participate in professional groups and associations as actively as other responsibilities and personal circumstances permit.

C. Foundation

1. Maintain co-operative relationship with Foundation Directors.
2. With Board approval, encourage and participate in Foundation projects including supporting grants, and co-sponsoring events.

IV. BUDGET/FINANCIAL MANAGEMENT

A. Annual Budget

1. Prepare proposed budget.

2. Work with Board to develop final budget.
 3. Recommend variations as circumstances change.
- B. Manage Operations with Budget Parameters
 1. Closely monitor or perform financial operations.
 2. Submit monthly financial reports to the Board with suggestions or comments if appropriate.
 3. Approve and certify all expenditures of funds for final Board approval.
 4. Supervise the payroll procedure.
 5. Work with the Auditor annually and report to the Board.
- C. Actively search out external/supplemental funding such as grants, partnerships, etc.
- D. Work with the Board in maintaining and monitoring The Board's long-range financial plan.

V. MANAGEMENT OF OTHER RESOURCES

- A. Physical Plant
 1. Develop and implement programs for effective utilization of physical plant resources.
 2. Provide an attractive interior and exterior environment, and comfortable places to ready and study.
 3. Provide for security and maintenance of physical plant.
 4. Recommend additions and changes to physical plant.
- B. Library Media
 1. Plan for collection development which will best serve the needs of the Library District.
 2. Direct selection of books and other library media for acquisition.
- C. Operations and Patron Service
 1. Identify problems that arise and bring together the necessary resources for solutions.
 2. Keep up with new technologies and innovative operating methods.
 3. Be accessible to patrons and be sensitive to their problems and suggestions.

VI. PLANNING

- A. Objectives and Goals
Based on and in support of the Board's Strategic Plan
 1. Obtain information concerning the needs of the population served by the Library District.
 2. Work with Board in developing overall objectives and specific goals.

B. Priorities and Schedules

1. Determine relative value of planned improvements.
2. Develop implementation timetables based upon anticipated resource availability.

C. Service Expansion

1. Be prepared to work for successful referenda.
2. Ability to work with architect, financial planner and other professionals as necessary for building/service expansions.

VII. Perform other duties as needed.

WARRENVILLE LIBRARY JOB DESCRIPTION FORMATTING EXAMPLE

JOB DESCRIPTION

JOB TITLE: Graphic Designer

DEPARTMENT: Administration

FLSA STATUS: Non-exempt

REPORTS TO: Marketing & Communications Specialist **PAY GRADE:** 9

SUPERVISES: Volunteers

JOB SUMMARY

The Graphic Designer develops and executes a consistent visual identity for the Library through the development and production of marketing and communications materials in print and electronic formats. Materials may include posters, flyers, signs, brochures, newsletters and collateral that support Library programs and services.

ESSENTIAL FUNCTIONS OF THE JOB

This job description should not be interpreted as all-inclusive. It is intended to identify the essential functions and requirements of this position. The incumbents may be requested to perform job-related responsibilities and tasks other than those stated in this job description.

1. Work with the Marketing & Communications Specialist to develop innovative and strategic marketing, communications and branding solutions.
2. Prepare layouts for print materials including flyers, posters, brochures and newsletters.
3. Create images for use in electronic communications such as email, website, social media and digital signage.
4. Generate creative ideas.
5. Ensure brand consistency.
6. Proofread all materials produced by Marketing team.
7. Coordinate production of print projects including researching vendors, requesting estimates, managing production schedules and delivery.
8. Coordinate and execute photo shoots, purchase stock photos and maintain inventory of photographs.

OTHER RESPONSIBILITIES

1. Edit copy and adapt text to multiple applications.
2. Attend meetings as necessary.
3. Provide written progress reports to the Marketing & Communications Specialist.
4. Assist with assorted Public Relations and Marketing duties.
5. Assist with social media.
6. Maintain an awareness of industry trends in graphic design and libraries.
7. Other duties as assigned.

MATERIALS & EQUIPMENT

This position requires the use of a variety of office machines and office equipment including but not limited to computer, printer, digital camera, paper cutter and laminator. Uses typical equipment necessary for creation of props and displays.

EDUCATION AND EXPERIENCE

1. Bachelor's Degree in graphic design or related field.
2. Minimum two years of demonstrated experience designing and producing print materials and web content with an organization that conducts programs such as library, park district or museum.
3. Some training and experience in the work of libraries is highly desirable.

MINIMUM REQUIREMENTS OF WORK

1. Ability to plan, organize and prioritize work in order to accomplish quality work in an effective and efficient manner.
2. Ability and willingness to work through a collaborative process to produce solutions that meet Library needs.
3. Ability to lead constructive discussions with colleagues to gather design requirements and review/revise drafts.
4. Ability to articulate rationale for design choices.
5. Ability to work independently.
6. Ability to communicate clearly and concisely, both verbally and in writing, in English.
7. Ability to use initiative, problem-solving skills and sound judgment.
8. Ability to design and create effective promotional materials using typical software such as Adobe Creative Suite or similar.
9. Familiarity with electronic and print file formats and production processes.
10. Intermediate to advanced photography skills using a DSLR camera.
11. Considerable knowledge of Microsoft Windows and MS Office software (Word, Excel, PowerPoint, Outlook, Publisher).

PHYSICAL DEMANDS / WORK ENVIRONMENT

These physical demands are needed to perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

At least 80% of the employee's regular duties involve the use of a computer (keyboard, mouse, stylus) while seated. Specific vision abilities required by the job include close vision and the ability to adjust focus. Occasionally, the employee may be required to walk, push, move, bend, stand, sit, squat, reach and stretch. The employee must be able to lift 25 pounds.

The employee must maintain effective auditory and visual discrimination and perceptions needed for making observations, communicating with others, reading, writing and operating assigned equipment.

Work is performed in a normal office environment where there is little or no physical discomfort associated with changes in the weather or discomfort associated with noise. Occasionally, the employee may be required to work at a location other than the Library, including outdoors.

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Messenger Public Library of North Aurora Illinois

Library Administrator Job Description

Salary Range/Federal Exempt Position/Library Administration

| | | | | |
|----|---|-----------------------------|--------------|--------------|
| 12 | E | Library Administrator (MLS) | Set by Board | Set by Board |
|----|---|-----------------------------|--------------|--------------|

Description:

The Library Administrator, working in concert with the Library Board of Trustees' approved plans, policies, and budget, leads the staff in providing library services to the community of North Aurora, Illinois

Essential functions and duties:

1. Provide leadership and direction in planning, organizing, implementing, and evaluating all library programs, resources, activities, and staff.
2. Develop and recommend to Board of Trustees for approval: Library Policies, Long Range Plan, Budget, and other related material.
3. Provide final determination of all personnel actions including initial employment, classification changes, promotions, evaluations, or terminations and insures that such activities are consistent with board approved policies. Insures that such policies are consistent with all applicable federal, state, and local laws.
4. Serve as a spokesperson and advocate for the library throughout the community.
5. Represent and maintain active involvement by the Library within RAIL Library System and the RAILS MAGIC Library Computer Consortium.
6. Keep informed of current trends, legal issues, and other developments affecting libraries and takes or recommends action when appropriate.
7. Maintain memberships in professional library associations and participate in their activities.
8. Oversee maintenance and improvement of library facilities, property, and equipment. Insure that facility is in compliance with federal, state, and local code and safety regulations.
9. Attend all Board of Trustees open meetings. On a monthly basis and more often if needed, provide clear, accurate, and timely information to the Board of Trustees.

Knowledge, Skills, and Abilities:

1. Knowledge of current principles, methods, and practices of public library service including the Library Bill of Rights.
2. Knowledge of administrative principles and practices such as finance, human resources, and planning.
3. Considerable skill in organizing, managing, and motivating people.
4. Considerable ability to formulate, implement, and manage an operating and capital budget in excess if \$1 million.
5. Considerable ability to establish and maintain effective and harmonious working relationships with staff, patrons, and community agencies.
6. Considerable ability to prepare and present clear, accurate and timely reports containing findings and recommendations.
7. Considerable ability to resolve difficult situations in a calm and professional manner.
8. Considerable ability and willingness to implement new programs and services brought about by rapidly changing information and/or technology;
9. Considerable ability to analyze issues and make informed recommendations to the Board of Trustees.
10. Considerable ability to develop and implement plans for growth, use, and development of library facilities in accordance with the needs of the residents of the community.

Qualifications:

1. Masters Degree in Library Science from an American Library Association (ALA) accredited program.
2. Eight years progressively responsible full time work as a professional librarian serving in a public library.
3. Four years of administrative/managerial experience as library administrator, assistant library administrator or head of a large department that includes other professional librarians.

Midlothian Public Library
Job Description

Job Title: Library Director

Reports to: Board of Trustees

FLSA: Full time, exempt

Pay Grade: 12

Position Summary:

Under the direction of the Board of Trustees, assumes overall responsibility for the development and delivery of library services and for the administration, operation, and security of the library.

Essential Duties:

- Develops the overall vision, goals and objectives of the library, integrating the ideas of the public, the Board of Trustees, and the staff. Guides short- and long-range planning efforts, including the development and implementation of strategic planning cycles.
- Oversees and evaluates the effectiveness of all aspects of day-to-day library operations, including: collection development, materials processing, patron services, programming, information technology and building management, delegating responsibilities to department managers as appropriate.
- Develops and prepares the annual budget, appropriation, and tax levy for approval by the Board of Trustees and submission to the Village. Implements and manages the approved budget, monitoring and controlling expenditures. Oversees the ongoing business operations of the library. Identifies and develops sources of non-tax revenue, including grants and gifts.
- Provides regular reports to the Board of Trustees about the status of the library and its resources, services, and usage. Attends and prepares background materials for board and board committee meetings, and provides counsel and advice on all matters that are considered. Recommends and helps formulate policy and policy changes. Executes the decisions of the board.
- Provides for the recruitment, training, supervision, evaluation, and ongoing development of staff. Directly supervises and evaluates the performance of department managers. Directs and coordinates the efforts of the staff management team. Facilitates communication between staff in all departments.
- Provides for the development, repair, maintenance, safety, and security of the library building, property, equipment, and furnishings. Maintains an emergency response plan.
- Develops and sustains a public information program that effectively informs the community about library services and promotes a strong library presence in Midlothian. Represents the library on occasions that require professional competence for promoting library services, programs, and goals, and for explaining policies, procedures and operations.
- Pursues and maintains contact with other community organizations and develops methods of cooperation. Establishes effective working relationships with community leaders and officials. Works with the Friends of the Library in promoting the library's interests in the community.
- Ensures the library's compliance with relevant federal, state, and local laws. Completes required state reports and complies with requirements for good standing in consortia and regional and state library systems. Follows best practices and standards set forth by the American Library Association and Illinois Library Associations.
- Attends conferences, workshops and meetings and reads professional literature to stay informed of trends and developments in library management, services, and technology.
- Assumes other duties and projects as assigned.

Qualifications: Master's in Library Science. Minimum 4 years full time professional experience in a public library, including one year supervisory and managerial experience.

Revised 10/2017

Midlothian Public Library
Job Description

Working Conditions/Physical Requirements:

Works in an indoor office environment.

The ability to lift 25 pounds or less; standing for long periods of time.

Core Competency Requirements:

In order to perform these duties effectively and adhere to the library's commitment to high quality public service, the employee must possess, and will be expected to consistently exhibit, these core qualities and capabilities:

- **Competence** is the ability to learn various job functions, to perform them correctly and completely, and to understand why they are necessary and how they affect library operations and other staff members.
- **Productivity** is the ability to function efficiently and purposefully so as to produce the expected volume of useful work in a timely manner.
- **Initiative** is the capacity to view one's duties broadly rather than narrowly, to be a "self-starter", to anticipate problems or needs and be resourceful in handling them, to step forward to address issues without being specifically directed to do so, and to take responsibility for thorough and effective follow-through.
- **Commitment** is characterized by dedication and a sense of responsibility to co-workers and the library as well as to the job. Committed employees can be relied on to set a good example for co-workers. They consistently fulfill their work schedules, exhibit good work habits, meet deadlines, and go above and beyond their duties.
- **Judgment** is the ability to make appropriate decisions given both the situation at hand and the employee's position at the library, to exercise discretion where needed, and to establish priorities correctly when performing their duties.
- **Teamwork** is the capacity to interact and communicate effectively with co-workers for the common good of the staff and the library. A cooperative, non-competitive spirit, supportiveness, courtesy, and respect for the feelings, circumstances, and perspectives of others all contribute to teamwork and staff cohesiveness. An ability to adapt to change and a willingness to accept direction and constructive criticism from a supervisor are also needed.
- **Effective Public Service and Interpersonal Contact** depends on attitude, demeanor, and appearance as well as on specific skills. Responsiveness, courtesy, helpfulness, the ability to speak and write clearly and grammatically, a neat personal appearance, and an orderly work space enhance customer satisfaction and project a positive image of the library with the public and others.
- **Professionalism** includes bringing to the job a body of knowledge and expertise in the field of library and information science that is characterized by a skillful implementation of library procedures, operations and services. It is also characterized by maintaining awareness of library trends, philosophies of service and technology as part of one's own professional development. This entails attending workshops and conferences, reading professional literature and pursuing other methods of continuing education.
- **Leadership** is characterized by the willingness and the ability to assume responsibility. Employees who are leaders model the work habits, behaviors and attitudes expected of all library staff. Effective leaders exhibit creative problem solving skills and the ability to grow and develop in times of change. Department heads set the direction for their department and have the capacity to motivate and guide staff to perform to the best of their abilities.

South Holland Public Library

16.0 Job Descriptions



16.1 JOB TITLE: Library Director

DEPARTMENT: Administration

REPORTS TO: Board of Library Trustees

SUPERVISES: All Library Employees

POSITION SUMMARY:

This exempt, full-time position is responsible for day-to-day library operations. The Library Director deals responsibly with user problems and emergencies to maintain a safe and pleasant work environment.

Responsibilities and Duties:

- Provides friendly, courteous and accurate service to all users.
- Provides leadership in the library.
- Responds to user requests, suggestions and complaints in a timely manner.
- Initiates, plans, supervises and evaluates operations, activities and services of the library
- Advocates for the library by serving as the official representative of the library in the community and throughout the library field and by speaking before community, civic and other groups about the library's services.
- Establishes and maintains effective working relationships with library users, other governmental agencies, civic and community groups and the general public.
- Develops staff job descriptions, recommends and administers personnel policies involving hiring, evaluating, promoting and terminating staff.
- Directly supervises the Management Team; indirectly supervises all library employees.
- Defines expectations for staff performances, oversees and implements the staff evaluation process.
- Promotes staff morale through communication, staff meetings, in-service programs and staff trainings.
- Supervises and encourages continuing education for staff.
- Attends Library Board meetings and committee meetings and serves as a resource for the Library Board.
- Develops and submits an annual budget and monthly financial reports to the Library Board.
- Develops and submits monthly and annual service reports to the Library Board.
- Formulates and recommends policies to the Library Board and implements Board-adopted policies and library procedures.
- Develops and administers strategic, capital, disaster and building plans for the library.
- Monitors and approves appropriations and expenditures.
- Prepares legal documents, oversees the filing of required documents and publishing of required notices.
- Develops and oversees grant proposals and submissions.
- Creates, organizes and implements solicitation of donations and/or gifts to the library, reviews and acknowledges receipt of donations and/or gifts.

South Holland Public Library

16.0 Job Descriptions



- Monitors, oversees and evaluates the cost and adequacy of insurance coverage, services provided by insurance companies, insurance proposals and makes recommendations to the Library Board.
- Oversees automation and technology needs and maintenance of the library, implements new technology as appropriate.
- Attends library and professional meetings and participates in regional and statewide professional activities.
- Complies with all library and personnel rules and regulations.
- Performs other work as assigned.

Knowledge, Skills and Abilities:

- Knowledge of library philosophies, practices, procedures and technologies.
- Ability to set priorities, make decisions, and exercise discretion with users and staff members.
- Ability to think analytically and to exercise initiative.
- Ability to prioritize work, meet established deadlines, delegate duties and attend to details as appropriate.
- Ability to handle multiples and simultaneous tasks.
- Ability to develop and implement policies and procedures.
- Ability to establish and maintain effective relationships with staff members, government officials, community leaders, users, and the media.
- Ability to hire, train, supervise, discipline and evaluate staff members at all levels of experience.
- Ability to work effectively on a team.
- Knowledge of library budgetary and fiscal practices; library law; Freedom of Information Act (FOIA) and Open Meetings Act (OMA) regulations; and state library standards.
- Knowledge of computers and the Internet, especially integrated library systems software, Microsoft Office products and other relevant software programs.
- Ability to communicate effectively, both in writing and verbally, and to prepare and present reports and other information in the appropriate format.
- Ability to work the hours needed to complete the responsibilities of the Library Director.
- Ability to bend, stoop, and lift up to 20 pounds to access library areas and materials.

Qualifications:

- MLS from an ALA accredited program.
- Five (5) years library supervisory experience or two (2) years public library director or assistant library director experience.
- Reads, understands, writes legibly and speaks articulately in English.
- Position requires day, evening and weekend hours.
- Access to transportation.

Byron

Director

General Description

Highly responsible strategic work involving the direction of a broad range of public library functions:

Work involves responsibility for the management of a public library collection and for the provision of library services to patrons and community organizations. Duties include policy recommendation, departmental planning, and direction and administration of library activities. The position is also invested with making the most difficult library technical decisions. The work requires that the employee have thorough knowledge, skill and ability in every phase of the public library field.

Supervision Received

Works under the administrative direction of the Library Board of Trustees

Essential Job Functions

- Directs the operations of patron services
- Evaluates and administers library programs such as circulation, reference, reader's advisory services, children's services, community services, and public information
- Responsible for developing print and non-print collections, including selection, organization, maintenance, preservation, withdrawal, and disposal of materials, either directly or through appropriate delegation
- Directs the development, repair and maintenance of the Library building
- Prepares regular narrative and statistical reports for the Library Board of Trustees, and others as designated; assists in preparing meeting agendas and materials and participates in Library Board of Trustees meetings
- Supervises the library staff, directly or through appropriate delegation, to create a harmonious team environment
- Prepares staff schedule
- Prepares the annual budget and presents and defends budget requests before the Library Board of Trustees
- Directs and controls the expenditure of departmental fund allocations within the constraints of approved budgets; prepares bills for Treasurer
- Confers with State agencies, other public libraries, corporations, and community groups in the development of library programs for the community and assists in coordinating interlibrary program efforts
- Provides reference and reader's advisory services on a regular basis to library patrons
- Directs the training of library staff in technical and administrative library skills
- Directs and participates in personnel actions such as hiring, termination, assignment, evaluation, and labor relations

- Represents the library on regional and state committees and serves as the community's authority on library issues
- Develops short-term and long-range goals and plans for collections, services, and programs in keeping with the library's mission statement and operating policies; studies and plans development of library services to meet present and future community needs
- Performs related work as required

Knowledge, Skills and Abilities

- Thorough knowledge of the principles and practices of public library functions
- Thorough knowledge of the principles and practices of public administration as applied to a public library
- Thorough ability in oral and written communications
- Thorough ability to administer the activities of a public library and to supervise the work of others
- Thorough ability to create, maintain, follow budget guidelines as set by the Board of Trustees
- Thorough ability to make decisions in an environment of limited resources and competing claims
- Thorough ability to establish and maintain effective working relationships with superiors, subordinates, associates, officials of other agencies, and the general public

Qualifications

- Master's Degree in Library Science from an accredited college or university
- Five years of progressively responsible library administration experience including at least three years in a supervisory capacity, OR, an equivalent combination of education and experience substituting on the basis of one year for each year of education

Physical Requirements

- Ability to move and/or lift materials up to 25 pounds
- Ability to push a loaded book truck weighing up to 300 pounds
- Regularly required to stand, walk, bend, kneel, crawl, reach, climb, balance, and sit
- Ability to operate a keyboard at efficient speed and typical office equipment, including computer hardware
- Regularly required to talk and/or hear; use hands to operate objects, tools, or controls; and reach with hands and arms
- Vision and hearing at or correctable to "normal ranges"
- Occasionally required to attend off-site meetings

Lincolnwood Public Library District
Job Description

Position Title: Library Director
Supervisor Title: Board of Trustees
FLSA Status: Exempt
Last Updated: July 2015

Minimum Qualifications

MLS from an ALA accredited graduate school. Five years full time professional experience in a public library environment, including four years with supervisory and managerial responsibilities. Verifiable leadership, teambuilding, budgeting, and fiscal management skills. Intermediate to advanced computer and information technology skills.

Job Responsibilities

Within the goals, policies and guidelines established by the library board, assume overall responsibility for the development and delivery of high-quality library services and for the administration, operation, and security of the library.

Primary Duties

1. Provide friendly, efficient, and knowledgeable customer service.
2. Coordinate and oversee day-to-day library operations, including the delivery of library services and facility management.
3. Coordinate all planning efforts of the staff and library board, to include: developing, implementing and evaluating library services; building and maintaining a strong, balanced, up-to-date and useful collection of library materials and resources; and developing and implementing strategic planning cycles.
4. Develop and prepare the annual budget and related fiscal documents for the library board. Implement and manage the approved budget, and monitor and control expenditures. Oversee the ongoing business operations of the library.
5. Provide regular reports to the board about the status of the library and its services, resources and usage. Attend and prepare background materials for board and board committee meetings, and provide information, counsel and advice on all matters that are considered. Recommend and help formulate policies and policy changes. Execute decisions of the board.
6. Develop and sustain a public information program that effectively informs the community about library services and promotes a strong library presence in Lincolnwood. Represent the library on occasions that require professional competence for promoting library services, programs and goals, and for explaining policies, procedures and operations. Pursue and maintain contact with other community organizations, including the Friends of the Library, and develop methods of cooperation. Establish effective working relationships with community leaders and officials, and serve on committees of community organizations whose efforts may affect the nature and quality of library service.
7. Provide for recruitment, training, supervision, evaluation, motivation and ongoing development of a highly effective, responsive and service-oriented staff. Directly supervise and evaluate the performance of the assistant library director, department heads and other administrative staff. Direct and coordinate the efforts of the staff management team.
8. Stay abreast of new technologies and library trends. Identify, assess feasibility, and implement information technology services that respond to the needs and interests of the community.
9. Assist and instruct patrons using virtual resources, downloading digital content, using publicly available technology including computers, printers, copiers, scanners, fax, etc. in scheduled group programs or one-on-one training sessions.
10. Understand and use technology systems and equipment as outlined in the Lincolnwood Library Technology Core Competencies in the areas of hardware, operating system and file management, software applications, and internet.
11. Collect, maintain, report, and analyze accurate and up-to-date statistics about the use of library services.

Additional Duties

- Assist with development and fundraising efforts on behalf of the library, including the pursuit of appropriate grants.
- Serve on committees of library and community organizations in order to identify resources and services that respond to the needs and interests of the community.

Lincolnwood Public Library District
Job Description

General Performance Requirements – Annual Evaluation

In order to perform these duties effectively and in a manner consistent with the library's commitment to high quality public service, the employee must possess, and will be expected to consistently exhibit, the following qualities and capabilities. These performance categories are what the position's annual evaluation is based on.

- **Competence** relates primarily to technical aspects of the job: the ability to learn various job functions (including those that require computer competence), to perform them correctly and completely, and to understand why they are necessary and how they affect library operations and other staff members.
- **Productivity** is the ability to function efficiently and purposefully so as to produce the expected volume of useful work in a timely manner.
- **Initiative** is the capacity to view one's duties broadly rather than narrowly, to be a "self-starter", to anticipate problems or needs and be resourceful in handling them, to step forward to address issues without being specifically directed to do so, and to take responsibility for thorough and effective follow-through.
- **Commitment** is characterized by dedication and a sense of responsibility to co-workers and the library as well as to the job. Committed employees can be relied on to set a good example for co-workers. They consistently fulfill their work schedules, exhibit good work habits, meet deadlines, and give extra of themselves when necessary.
- **Judgment** is the ability to make appropriate decisions given both the situation at hand and the employee's position at the library, to exercise discretion where needed, and to establish priorities correctly when performing their duties.
- **Teamwork** is the capacity to interact effectively with co-workers for the common good of the staff and the library. A cooperative, non-competitive spirit, supportiveness, courtesy, and respect for the feelings, circumstances, and perspectives of others all contribute to teamwork and staff cohesiveness. An ability to adapt to change and a willingness to accept direction and constructive criticism from a supervisor are also needed.
- **Effective Public Service and Interpersonal Contact** depends on attitude, demeanor, and appearance as well as on specific skills. Responsiveness, courtesy, helpfulness, the ability to speak and write clearly and grammatically, a neat personal appearance, and an orderly work space enhance customer satisfaction and project a positive image of the library with the public and others.
- **Professionalism** includes bringing to the job a body of knowledge and expertise in the field of library and information science that is characterized by a proficient implementation of library procedures, operations and services. It is also characterized by maintaining awareness of library trends, philosophies of service and technology as part of one's own professional development. This entails attending workshops and conferences, reading professional literature and pursuing other methods of continuing education.
- **Leadership** is characterized by the willingness and the ability to assume responsibility. Employees who are leaders model the work habits, behaviors and attitudes expected of all library staff. Effective leaders exhibit creative problem solving skills and the ability to grow and develop in times of change.
- **Technology Proficiency** is characterized by the ability to adapt to new technologies regarding computers, audiovisual equipment, information management systems and other library systems. Employees are proficient in using library technologies; understand the critical and evolving role of technology in libraries; resolve routine problems without assistance; facilitate information access for patrons; demonstrate level of technical expertise appropriate to job function and a willingness and ability to learn and apply new and emerging technologies. See Lincolnwood Library core Technology Competencies for details.

Reddick Public Library District

JOB DESCRIPTION

TITLE: Library Director

SALARY REVIEW: Annually

CLASSIFICATION: Full-time, Exempt

REPORTS TO: Board of Trustees

Duties:

- Plans and coordinates the operation and administration of the library.
- Establishes rules and procedures for library operation.
- Formulates and recommends policies to the library board and interprets policies to the library staff and the public.
- Implements library goals, objectives and policies.
- Develops and communicates plans for library growth.
- Prepares required library district ordinances and legal documents.
- Supervises hiring, evaluating and termination of employees and recommends pay increases based upon staff evaluations.
- Administers payroll information for payroll services.
- Maintains personnel records for staff.
- Assists in preparation and administration of the library's annual budget.
- Oversees preparation of accounting and legal records for annual audit.
- Prepares for and attends monthly library board meetings. Prepares reports of library operations for the board. Plans and conducts regular staff meetings.
- Analyzes sources of revenue, anticipates expenditures and costs of services.
- Plans and coordinates staff training and workshops.
- Selects and screens the purchase of library materials and equipment and oversees accurate inventory of the same.
- Administers library programs and administers library publicity of services and programs.
- Directs the overall maintenance of building and grounds.
- Fills out necessary reports for federal and state grants and funds.
- Investigates additional sources of funding.
- Attends meetings, seminars, and professional workshops.
- Establishes and maintains effective work relationships with the board of trustees, city officials, community organizations, school groups, library associates and the general public.
- Cooperates as a team member with the library staff in performing any duty essential to the achievement of efficient library operations.

Qualifications:

- Master's Degree, preferably in Library Science from an ALA accredited institution and at least 5 years of experience in a supervisory position.
- Thorough knowledge of the theories, principles and techniques of librarianship.
- Ability to relate to employees and handle personnel issues in a positive and responsive manner.
- Ability to exercise tact, leadership and judgment and direct, coordinate, plan and administer for quality library service to the community.

**ODELL PUBLIC LIBRARY DISTRICT
301 E. Richard Street, Odell, IL 60460**

Job Description

Job Title: Library Director

Hours: 20/week - Salaried, non-exempt (considered full-time)

Reports to: OPLD Board of Trustees

Supervision: Other OPLD Staff and Volunteers

JOB SUMMARY: The Library Director is responsible for management of the Odell Public Library and carrying out the OPLD policies as established by the Board of Trustees

DUTIES:

Day to day management of the OPLD

Hire and supervise staff; assign staff duties

Be responsible for training or arranging training for staff

Performs staff evaluations and reviews

Report on OPLD activities regularly to the Board of Trustees

Review and be responsible for ordering books, materials and Collection Development

Manage memorials to the OPLD and maintain memorial records

Prepare state reports and grant requests, such as IPLAR and Per Capita

Coordinate with RAILS staff to keep library up to date on procedures

Prepare Ordinances, Resolutions and other documents for approval by the Trustees

Collect mail or designate staff to assist with this task

Review and prepare OPLD bills for payment

Maintain and record financials in Quick Books

Prepare budgets for review and approval by the Trustees

Prepare monthly financial reports for board meetings

Coordinate programs and events for the Library

Coordinate Summer Reading Program with staff assistance

Monitor and maintain current information on the library website

Represent the OPLD at community, area and state meetings

Participate in the Tri-County Librarians Meetings, when possible

Write press releases and do publicity for the OPLD

Be the FOIA Officer for the OPLD

Be the OMA Officer for the OPLD

Be the IMRF Authorized Agent for the OPLD

Other duties as assigned by the Board of Trustees

JOB SPECIFICATIONS:

- Library degree or experience and interest in library work
- Strong writing and organizational abilities
- Public speaking experience
- Knowledge of and desire to work with community resources
- Professionalism and integrity in appearance and conduct
- Skilled in budget planning and management experience
- Have own transportation with appropriate insurance and be willing to travel on behalf of the OPLD to trainings or meetings, as necessary

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Downers Grove

Job Title: Library Director

Job Purpose: To develop and implement the overall goals and objectives of the library, providing library services, facilities, technology, and personnel that meet the needs of the community.

Job duties:

The Library Director is directly responsible to the library board.

Develops the overall vision, goals and objectives of the library, integrating the ideas of the public, board and staff.

Manages the finances of the library and the foundation, monitoring current expenditures and revenue, forecasting future trends, and developing annual budgets and long range financial plans.

Develops and coordinates the implementation of major projects that impact on all areas of library operations and services.

Directs and evaluates the work of the assistant library director and the department heads.

Develops and implements library policy and procedures. Takes the ultimate responsibility for resolving administrative and procedural emergencies.

Prepares reports and recommendations for the library board.

Develops professional skills, knowledge, and abilities through workshops, conferences, professional affiliations, and examination of professional literature. Uses this knowledge to analyze and improve the library's public services, facilities, technology, staff development, and up-date the library board on current methods and trends.

Consults with the assistant library director regarding the development and implementation of the personnel management program. Is directly involved in the selection and training of key management personnel.

Represents the interests of the library to the community, and other governmental and professional organizations.

Handles operational details in the absence of the assistant library director.

Provides other services as necessary to support operations, such as: meets with the library boards, serves as liaison to the Downers Grove Public Library Foundation and Friends of the Library, speaks to community and professional groups, is active in state and national library associations, responds to emergency calls from fire and police in the night, handles critical incidents with the public and staff.

Duties require an understanding of the operation of the entire library. Serious complaints are handled by this employee. Good judgment is important to protect the image and resources of the library. Deals primarily with questions of policy and library practice. Regularly involved in project development. Coordinates work of the department heads, indirectly supervises work of general staff as needed.

Skills: Required: This is a professional position which requires an MLS and broad knowledge of the principles and practices of librarianship. Excellent administrative, financial planning, communication, and personnel management skills. Ability to speak to diverse groups concerning library affairs. Ability to handle critical incidents and resolve conflicts involving patrons, staff, materials, or facilities. Ability to participate in meetings and conferences outside of normal working hours. Ability to inspire and lead staff. Initiative, awareness and vision in developing library services. Eight years of public library experience in increasingly responsible positions, including at least four years at the management level.

Preferred: Experience in library technology and fundraising.

Downers Grove

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Three Rivers Public Library District Job Description Executive Director

Definition

Under administration of the Library Board of Trustees, this exempt position is responsible for day-to-day library operations. The director deals responsibly with patron problems and emergencies to maintain a safe and pleasant work environment. The director is responsible for supervision of all employees.

Responsibilities and Duties Include

- A. Provides friendly, courteous and accurate service to all users
- B. Provides a leadership role in the library
- C. Responds to patron requests, suggestions and complaints in a timely fashion
- D. Evaluates operations and activities of the library, plans for future needs, develops library collections and services and adopts and implements new services
- E. Advocates for the library by serving as the official representative of the library in the community and throughout the library field and by speaking before community, civic and other groups about the library's services
- F. Establishes and maintains effective working relationships with library patrons, other governmental agencies, civic and community groups and the general public
- G. Develops staff job descriptions, recommends and administers personnel policies involving hiring, evaluating, promoting and terminating staff
- H. Directly supervises the Management Team; indirectly supervises all library employees
 - I. Defines expectations for staff performances, oversees and implements the staff evaluation process
 - J. Promotes staff morale through communication, staff meetings, in-service programs and staff trainings
 - K. Supervises and encourages staff members continuing education
 - L. Attends library board meetings and committee meetings and serves as a resource for the library board
- M. Develops and submits an annual budget and monthly financial reports to the library board
- N. Formulates and recommends policies to the library board and implements board adopted policies and library procedures
- O. Monitors and approves appropriations and expenditures
- P. Prepares legal documents, oversees the filing of required documents, and publishing of required notices
- Q. Oversees grant proposals and submissions
- R. Creates, organizes and implements solicitation of donations and/or gifts to the library, reviews and acknowledges receipt of donations and/or gifts

- S. Monitors, oversees and evaluates the cost and adequacy of insurance coverage, services provided by insurance companies and insurance proposals and provide recommendations for the library board
- T. Oversees the automation and technology needs and maintenance of the library, implements new technology as appropriate
- U. Attends library and professional meetings and participates in regional and statewide professional activities

Knowledge, Skills and Abilities

- A. Knowledge of library philosophies, practices, procedures and technologies
- B. Ability to set priorities, make decisions, and exercise discretion with patrons and staff
- C. Ability to think analytically and to exercise initiative
- D. Ability to prioritize work, meet established deadlines, delegate duties and attend to detail as appropriate
- E. Ability to handle multiple and simultaneous tasks
- F. Ability to develop and implement policies and procedures
- G. Ability to establish and maintain effective relationships with staff and with local and regional media
- H. Ability to hire, train, supervise, discipline and evaluate staff at all levels of experience
- I. Ability to work effectively as a team
- J. Knowledge of library budgetary and fiscal practices and library law
- K. Knowledge of computers and the Internet, especially integrated library systems software, Microsoft Office, and similar software programs
- L. Ability to communicate effectively, both in writing and orally and to prepare and present reports and other information in the appropriate format
- M. Ability to work the hours needed to complete responsibilities of Library Director

Qualifications:

- A. MLS from an ALA accredited program
- B. Five years library experience
- C. Two years supervisory experience
- D. Position requires day, evening and weekend hours
- E. Access to transportation

Genoa

Library Director Position Description

A. Primary Function

Under the policy guidance and direction of the Genoa Public Library District Board of Trustees, the Library Director will serve as the Administrator of the Genoa Public Library District. All employees of the Genoa Public Library District are under the supervision of the Library Director.

B. Organizational Relationship

The Library Director of the Genoa Public Library District reports to the elected Board of Trustees of the Genoa Public Library District.

C. Work Activities

a. Personnel.

1. Interview, hire, orient and train all library employees. This includes training in compliance with the Illinois Library Records Confidentiality Act.
2. Assign work responsibilities to all classifications.
3. Schedule all employees and approve work hours submitted for payroll including vacation scheduling.
4. Maintain payroll records to include paid vacation hours available to each staff member.
5. Conduct annual evaluations of all employees.
6. Perform tasks of all classifications as needed.
7. Conduct monthly staff meetings.

b. Financial

1. Work in conjunction with the Board of Trustees to create an annual Working Budget.
2. Work in conjunction with the Board of Trustees and library attorney to create an annual Budget and Appropriations Ordinance.
3. Work in conjunction with the Board of Trustees and library attorney to create an annual Tax Levy.
4. Work in conjunction with the library attorney to assure compliance with all publication requirements and deadlines for required annual financial and reporting documents.
5. Work in conjunction with the Board of Trustees to create a Salary Schedule.
6. Reconcile daily income and prepare deposits.
7. Prepare invoices for payment by providing code information to the accountant or bookkeeper.

c. Administration

1. Collect and maintain necessary statistics. Prepare and, with Board approval, submit the Illinois Public Library Annual Report (IPLAR) and District supplements as required by law.
2. Collect and maintain necessary statistics. Prepare and, with Board approval, submit the annual Illinois State Library Per Capita Grant application.
3. Participate in planning activities such as Strategic Planning, Technology Planning, Space Development and Utilization Planning, Annexation Planning, Program Planning, and Financial Planning

4. Work in conjunction with the Board of Trustees to create and maintain relevant Policies and Procedures in accordance with local need, Serving Our Public, and other professionally recognized guides.
 5. In conjunction with the Head of Adult Services and Technology, make recommendations to the Board of Trustees regarding changes to equipment including, but not limited to, all types of computing equipment, photocopiers, and phones.
 6. Create a work environment that encourages professionalism, innovation, and cooperation.
 7. Participate in and supervise collection development.
 8. Apply for grants would be beneficial to the library.
 9. Responsible for approving content on all promotional activities including print and online activities.
 10. Work to create cordial relationship with City Council, Main Street, Chamber of Commerce and other appropriate organizations.
 11. Participate in RAILS activities including Committee work, and regional groups.
- d. Public Service
1. Be attentive to library trends and their local implications.
 2. Be responsive to suggestions from within the Library District with regard to programming and collection development while providing programming and collection support to the diverse interests of the library district.
 3. Be an advocate of library service when addressing patron complaints or concerns.
- e. Continuing Education
1. Monitor and make use of continuing education opportunities that would benefit library service through additional staff or Director training.
 2. Make clear to staff that they are encouraged to take advantage of additional training when directly related to their library employment.
- f. Clerical
1. Responsible for all ordering.
 2. Responsible for approving all forms created for internal use.
 3. Prepare monthly reports for distribution at Board of Trustees meeting.
 4. In cooperation with the President, Board of Trustees prepare all meeting agendas.
- g. Other duties as assigned

EDUCATIONAL REQUIREMENTS

Minimum requirement as defined by RAILS Membership Requirements in order to sustain Genoa Public Library District Full Member status in RAILS.

PREFERRED QUALIFICATIONS

- A. Ability to analyze the needs of the community and maintain a collection of books, periodicals and other items in a variety of formats.
- B. Knowledge of bibliographic principles, reference materials, and electronic resources.
- C. Excellent communication skills in order to train staff and communicate effectively with patrons.
- D. Ability to react nimbly to a rapidly changing environment and a willingness to adapt to the evolving, and sometimes temporary, needs of the organization.

Executive Director

Reports to: Board of Library Trustees
Hours per week: FT/ exempt, 37.5 hours per week/; weekends and night hrs.
Supervision exercised: Coordinates and oversees all library activities and staff.

Job Summary:

The Executive Director operates at the pleasure of the library board of trustees as the CEO of the library and is responsible for translating state, federal and local laws and board policies into procedures that reflect adaptive and imaginative library services, collections, programs and products reflective of community demands and needs. The primary duties of the Executive Director are twofold: (1) to provide the library staff with the necessary resources and budget to serve the community in a seamless, exemplary fashion; (2) to translate community needs/wants into attainable goals, products and services that fulfill the strategic plan of the library. To that end, the Executive Director serves as the library board's liaison to the staff and community - overseeing the annual budget and various state/federal required reports; handling employment/staff training/compensation/evaluation and insurance issues; assisting in devising and evaluating new programming ideas, new collections and new services as well as handling all physical building issues. Additionally, the Executive Director serves as the political board secretary for elections and is adept at long range/strategic planning. The Executive Director acts as the head of a management team and transfers the daily activities of running the library to those respective department heads overseen by the Assistant Director. Operates within the local/state political realms as well as in all areas of public library administration, the Executive Director must show a strong knowledge of all areas of library operations & must consistently demonstrate exceptional organizational, management & visionary leadership skills. S/he must have a strong commitment to the development of top quality library service & possess the ability to inspire other staff to share this commitment plus be able to communicate a shared vision of library service to staff and to the public.

Qualifications:

- MLS (MLIS) degree from an ALA accredited graduate library program + additional content degree desirable.
- 5 yrs+ previous library management/administrative experience required.
- Broad knowledge of current library practices, trends and technology and professional library concerns.
- Working functionality with computers - word processing/spreadsheets, presentation software, Internet, social networking and various business productivity software required.
- Working knowledge in business negotiations - contracts, health insurance, banking/finance, building and renovation programs.
- Strong management & problem-solving skills required with leadership skills emphasized, including excellent communication and negotiation skills.

- Proven experience in the development and evaluation of library programs and services.
- Proven ability to manage multiple priorities and tasks in difficult environments.
- Positive experience in working with public boards on varied projects inclusive of budget administration and grant writing, preferably within a District environment.
- Experience with long range/strategic planning and leadership skills, including work with boards and various community groups.
- Proven experience in representing the library to the general public, related agencies including library associations, systems and the state, and the media.
- Understands the role of public boards and provides methods for self-evaluation and working within deadlines.

Essential Functions:

- Makes daily decisions required to manage the entire organization (i.e. interpreting policies regarding physical facilities, staff, programs and collections and services and helping formulate policies).
- Coordinates recruitment, hiring, firing, training, development & evaluation of all staff including developing job descriptions/defining duties, evaluation of performance, designing pay scales and benefits packages.
- Formulates overall goals & objectives for the library in conjunction with the Board, staff & community within a strategic, long-range planning framework.
- Recommends policy and helps interpret current procedures to the Board of Trustees and staff.
- Effectively interprets and communicates Board established policies.
- Compares, analyzes and evaluates all library programs, collections, products and services with respect to budget restrictions and goal attainment.
- Formulates & administers the library budget in conjunction with the Board of Trustees, based on goals, objectives & operating needs.
- Coordinates the purchase of all furnishings, equipment, materials & supplies.
- Administers library personnel policies & practices including scheduling of employees to meet community demands for service, reviewing time sheets, administering payroll & preparing IMRF reports.
- Develops & implements all public relations efforts in conjunction with the board & staff.
- Oversees preparation of various monthly and annual reports and statistics required by law or by situation.
- Serves on the CCS Governing Board as the representative of the library.
- Maintains knowledge of current trends & developments in appropriate library, technological & management fields.
- Represents the library at community, business and social events such as the Chamber of Commerce and city ad hoc committee meetings.
- Serves on appropriate Illinois library system and state committees.
- Regularly attends appropriate professional activities at the local, state & regional & national level.

- Attends meetings of the Board of Library Trustees and assists Library Trustees in their responsibilities.
- Other duties as assigned.

Performance Standards:

(To be developed by the Board)

- Meets job attendance requirements by being on-time for work, reporting absences as prescribed and showing regular attendance patterns.

Essential functions of this position must be performed with or without a reasonable accommodation. Requests for reasonable accommodation will be considered on a case-by-case basis.

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ZION-BENTON PUBLIC LIBRARY JOB DESCRIPTION

LIBRARY DIRECTOR

| | |
|-------------------------|--|
| Title: | Director |
| FLSA Status: | Exempt |
| Reports To: | Library Board of Trustees |
| Jobs Supervised: | Assistant Director, Department Coordinators for Adult Services, Youth Services, and Circulation/Technical Services. |
| Job Summary: | Responsible for Board relations, operation and maintenance of the library building and grounds, including directing staff; providing library collections, programs and services; preparing budgets and monitoring expenditures of funds; implementing the strategic plan; and community relations. |

Duties and Responsibilities:

Functions as chief executive officer of the library.

Recommends, develops, implements, provides supervision for and reviews policies and procedures approved by the library board.

- Provides leadership to the staff in interpretation and implementation of library policies.
- Regularly informs the board about library activities and makes them aware of trends and problems.
- Provides professional expertise and guidance to the board.
- Advises the board on operational, staffing, and facilities needs.
- Maintains records and documents necessary for administration and legal compliance of the library

Administers the overall program of library service to the residents of the service area.

- Works with the staff to develop and implement procedures and programs for both public and internal support services.
- Is responsible for the planning, evaluation, and implementation of automation systems to meet the library's needs.
- Purchases and recommends for purchase equipment and materials for library and patron use.
- Provides a quality collection of materials in a variety of formats to meet the needs of the community.
- Works with the staff to provide a wide variety of programs to meet the needs and interest of the community.
- Develops partnerships with local business and agencies to support library services and programming.
- Assures that the library environment is pleasant and the facility and services are easy and convenient to use.
- Assures that the staff is responsible to the needs of patrons and deals with them pleasantly and professionally.

Administers library staff.

ZION-BENTON PUBLIC LIBRARY JOB DESCRIPTION LIBRARY DIRECTOR

- Determines staffing requirements.
- Oversees the evaluation of the library staff.
- Interprets board policy to the staff.
- Counsels and advises the staff on personnel and patron problems.
- Encourages staff development by providing opportunities for continuing education and professional participation.
- Maintains awareness of current trends in librarianship and communicates that to the staff.
- Communicates staff concerns to the Board.

Oversees the development of library collections.

- Has ultimate responsibility for selection of materials and for developing and maintaining collections that address community needs, fit within the physical space available, and can be afforded in the library budget.
- Recommends creation or deletion of collections depending on need, space, and funding.
- Assures that library materials are properly cataloged, processed, shelved, and made available for patron use.

Administers budget and reporting system.

- Develops the annual budget.
- Initiates, coordinates, and implements the strategic plan.
- Identifies and develops sources of non-tax revenue, including grants and gifts.

Oversees management of library property.

- Plans for improvement and maximum utilization of the facility.
- Maintains an inventory of library furniture and equipment.
- Maintains emergency response plan.

Directs public relations for the library.

- Represents the library and the board in the activities of community organizations.
- Promotes the library to local media and community outlets.

Fulfils other obligations to the library board.

- Attends library-related conferences and meetings.
- Keeps abreast of trends and developments pertaining to librarianship.
- Maintains statistics of library use and reports regularly.
- Provides an annual summary of accomplishments.
- Performs other duties as assigned.

Contacts:

All library employees, Board of Trustees, volunteers, public officials, members of the public, peers in other libraries and other professional organizations, and the press.

ZION-BENTON PUBLIC LIBRARY JOB DESCRIPTION

LIBRARY DIRECTOR

Working Conditions:

Normal office conditions

Physical Demands:

- Requires full range of motion, including standing, sitting, or walking for extended periods.
- Requires manual dexterity and eye-hand coordination to move materials or operate automated equipment.
- Must be able to lift boxes of books, paper, or other items.

Education, Experience and Skills Required for Entry Into the Job:

- MLS from ALA-accredited program.
- 5 years of library experience.
- Management experience including supervising personnel, budgeting, automation and strategic planning.
- Exhibits integrity and a personal commitment to high standards in public service.
- Knowledge of financial, accounting, and bookkeeping practices and principles.
- Demonstrated expertise in Microsoft Office applications.

General requirements for all library employees:

- Commitment to the library's mission and goals.
- Commitment to providing uniformly gracious and friendly service to all people.
- Ability to establish and maintain harmonious working relationships.
- Ability to read, write and speak English.
- Ability to give and receive instructions in English.
- Alpha-numeric recognition skill.
- Ability to exercise good judgment.
- Ability to use basic office equipment.
- Honest, punctual, accurate, and able to maintain confidentiality.
- Ability to pass a criminal background check.

Special Requirements:

- Driver's license, proof of insurance and access to a vehicle.
- Schedule includes monthly evening meetings.

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