

# 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 Chair 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 strategic plan	E	S	N	U
• Services to meet the goals and objectives of the plan 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 strategic plan, policies & 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 Chair for inclusion in the Summation Form that will be used during the face-to-face appointment with the director.]*