Director Evaluation Form for Trustees

Executive Director's Annual Evaluation

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

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

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

Administration & Human Resource Management

Comments:

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

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

Comments:

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<th>A&amp;HRM totals: E ___    S ___    N ___   U ___</th>
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**Financial Management / Legal Compliance / Fundraising**

- Adequate control and accounting of all funds takes place; library uses sound financial practices
- Budget is prepared with input from staff and trustees; the library operates within budget guidelines
- 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.)
- Positive relationships with government, foundation and corporate funders are in place
- Positive relationships with individual donors is established
- Funds are disbursed in accordance with budget, contract/grant requirements and donor designations

Comments:

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<th>FM/LC/F totals: E ___    S ___    N ___   U ___</th>
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**Board of Trustee relationship**

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

Comments:

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<th>BTR totals: E ___    S ___    N ___   U ___</th>
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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.]