**Evaluation Summation Form**

Executive Director’s Annual Evaluation

Date:

**Form Instructions:**
1. Collect the evaluation forms from each board member and indicate how many Es, Ss, Ns, and Us each item and each category received in Part 1 of the form.
2. Summarize the comments for each section.
3. Use this form during your scheduled time with your director as an outline for discussion.
4. Fill out Part 2 of the form with your director.

**Part 1:**

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

<table>
<thead>
<tr>
<th>Area of Organizational Health</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Customer Service &amp; Community Relations</strong></td>
<td></td>
</tr>
<tr>
<td>• Level of patron satisfaction</td>
<td>E ___  S ___  N ___  U ___</td>
</tr>
<tr>
<td>• Customer service received by patrons</td>
<td>E ___  S ___  N ___  U ___</td>
</tr>
<tr>
<td>• Consistent application of policies that affect the public</td>
<td>E ___  S ___  N ___  U ___</td>
</tr>
<tr>
<td>• Services are communicated to the public effectively</td>
<td>E ___  S ___  N ___  U ___</td>
</tr>
<tr>
<td>• Working relationships and cooperative arrangements with government officials, community groups and organizations</td>
<td>E ___  S ___  N ___  U ___</td>
</tr>
<tr>
<td>• Awareness of community needs</td>
<td>E ___  S ___  N ___  U ___</td>
</tr>
<tr>
<td>• Mechanisms are in place to hear from patrons and the community-at-large</td>
<td>E ___  S ___  N ___  U ___</td>
</tr>
<tr>
<td>• Library is being marketed to the community</td>
<td>E ___  S ___  N ___  U ___</td>
</tr>
</tbody>
</table>

Comments:

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

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

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:

### 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:

### 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:

Total number of:
E ___  
S ___  
N ___  
U ___  

Part 2:

Director Comments:

Overall rating:
___ Exceeds expectations
___ Meets expectations
___ Does not meet expectations

Director: _____ agree  _____ disagree

Director Signature:               Date:

Board Signature:                 Date: