

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.]