

Waukesha Public Library

DRAFT

**Library Director
Evaluation**

To Library Board of Trustees:

The attached performance evaluation form will be used by the Library Board to gain insight to overall performance of the Library Director. This evaluation process will comprise of a review by the Human Resources Committee of all submitted evaluations. The Human Resources Committee will compile and generalize ratings and comments received, then summarize the results in a document to be presented in closed session to the Library Board of Trustees. A separate closed session will be scheduled, with the Library Director present, to deliver the summarized review and give time for further comments and clarifications by the Library Director and Board of Trustees.

Please take time to complete the Performance Evaluation Form. This evaluation process is not only a benefit to the library director's betterment professionally, but will strengthen the organization as a whole.

Evaluations are to be submitted to the Human Resources Committee during the XXX xx, xxxx Library Board meeting. Evaluations may be typed or hand-written and are to be submitted in paper form. Due to confidentiality, please do not email the completed evaluation. If you are unable to attend the meeting, please coordinate a time to turn in your completed evaluation to a Human Resources Committee member previous to the meeting date.

A closed session with the full Board will be scheduled at the regular XXXXX Board meeting to review the Human Resources Committee's recommendations. Thank you.

Human Resources Committee



Library Director Performance Evaluation Form

Name: _____ Trustee: _____

Date of this Review: _____ Trustee Signature: _____

Purpose of the Performance Evaluation

- To ensure the Director and the Library Board of Trustees are aware of how well expectations are being met.
- To serve as a formal vehicle of primary communication between the Library Board of Trustees and the Director.
- To identify any concerns the Library Board of Trustees may have, so that appropriate action can be taken.
- To demonstrate sound management practices and accountability to municipal officials and the community.

Use the Performance Rating scale below to evaluate the library director's performance during the review period. Consider the objectives listed in each category.

PERFORMANCE RATING	
Description	Definition
Exceeds Expectations (4)	Performance is at a high level and frequently exceeds normal expectations of the position.
Meets Expectations (3)	Performance is acceptable and desired results and expectations for the position are generally achieved.
Needs Improvement (2)	Performance and results achieved generally do not meet the standards and expectations for the position requirements.
Unacceptable (1)	Performance is consistently below standards and expectations of the position.

Relationship with Library Board of Trustees

- Working with the Library Board of Trustees, develops and promotes a vision for the library in the community. Provides leadership in achieving the vision.
 - Develops strategic plan in coordination with the Library Board of Trustees and Assistant Director.
 - Reports regularly to the Library Board of Trustees on progress of both long and short-range plans.
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- Keeps the board informed on issues, needs, and operations of the library.
 - ~~Keeps the board updated on the implementation of library goals, objectives, and short and long term planning.~~
 - Keeps the board informed on local, state, and national library trends.
 - Offers professional advice to the board on items requiring board action, with appropriate recommendations based on thorough study and analysis.
 - Supports and implements board policies promptly and effectively for staff and public.
 - Keeps the board informed of board training opportunities.
 - Presents matters requiring the board's attention clearly and makes reasonable recommendations.
 - Is accessible and returns telephone calls or emails and is always willing to discuss issues.
 - Treats all board members with dignity and respects their point of view.

Rating: **4** **3** **2** **1**

Comments:

Community and Professional Relationships

- Monitors the scope and effectiveness of existing services on a continuous basis; assures that significant trends in customer interests are identified and defined; adapts Library resources to meet such trends.
- Directs and/or initiates and maintains continuing liaison with community leaders, other groups, other libraries, and local, county and state government officials, as appropriate to Library operations.
- Promotes the library and its services throughout the community through speaking opportunities, attendance at community group meetings, or other advocacy occasions.
- Maintains an active program of public relations and public information; represents the Library on other community boards and committees.
- Works with Bridges Library System and library staff to provide resource library services meeting the needs of Bridges Library System member libraries.
- Coordinates the Library's participation in the Bridges Library System; serves as ex-officio

member of the Bridges Board; serves as member of System and Resource Library Administration Association of Wisconsin (SRLAAW).

- Serves as an ex officio member on the Friends of Waukesha Public Library Board of Directors.
- Effectively communicates services of the library to the public.
- Gains the respect and support of the community for the operation of the library by working in a collaborative manner to promote the vision and goals of the library.
- Maintains visibility and accessibility to the stakeholders of the library.
- ~~Maintains an effective press and media campaign.~~
- Keeps abreast of local, state and national library trends.
- Participates and holds office in professional organizations, as appropriate.
- Treats the public and community officials with dignity and respect.
- ~~Director and staff provide adequate support to the Friends of the Library organization.~~

Rating: **4** **3** **2** **1**

Comments:

Business and Finance

- Develops estimated forecasts of Library operations to facilitate long and short term planning; analyzes information that aids the planning process.
- Seeks outside funding for library capital needs and other special projects.
- Defines in the annual budget and operational plan the shorter-range commitment of resources.
- Plans and prepares the annual budget to achieve objectives as identified by the Library Board of Trustees.
- Controls expenses of the Library and implements measures necessary to ensure compliance with budget limitations. Presents monthly financial statements and bills for Library Board of Trustees action.
- Keeps informed on the needs of the library – plant, facilities, equipment and supplies.
- Presents budgets that are realistic and that meet the needs of the library.
- Stays abreast of other sources of funding and attempts to find grants and other funds for the library.
- Evaluates financial needs and makes recommendations for adequate funding.
- Determines that funds are wisely spent and within budget limitations.
- Supervises operations, insisting on competent and efficient performance.

Rating: **4** **3** **2** **1**

Comments:

Employment, Supervision and Staff Development

- Develops, implements and maintains human resource management programs and practices that are consistent with the policies established and approved by the Library Board of Trustees. Makes recommendations to the Library Board of Trustees on human resources programs and policies that would serve to attract, develop, equitably compensate and retain competent personnel.
 - Establishes and maintains a working environment within the Library that encourages a high level of employee morale and productivity.
- ~~Develops and executes sound Human Resources procedures and practices in recruiting, employing, and retaining highly qualified, effective staff members.~~
 - ~~Develops good staff morale and loyalty to the organization.~~
 - Delegates authority to staff appropriate to the positions each hold.
 - Encourages staff to develop their skills through workshops and other training opportunities.
 - Recruits and assigns the best available Human Resources in terms of their competencies.
 - Monitors and evaluates the performance of staff to provide timely formal and informal feedback, and provides support, resources, and remediation to improve job performance based on documented deficiencies and proficiencies.
 - Promotes an environment of workplace safety.

Rating: 4 3 2 1

Comments:

Management Characteristics

- Monitors and controls performance of the Library in conformance with plans, objectives and budgets; accounts for variances and implements corrective action; develops and implements administrative procedures, schedules, plans and operating practices.
- Acts to resolve operational and administrative conflicts and problems; decides alternative courses of action; interprets policies; monitors and evaluates progress of delegated matters.
- Recommends policies for Library Board action; translates the policies and goals of the Library Board of Trustees into assignable responsibilities.

- Stays abreast of current trends and developments in the field of librarianship and participates in appropriate conferences, workshops and seminars.
- Maintains high standards of ethics, honesty and integrity in all professional matters.
- Sets an example for the staff through professional conduct and high principles.
- Has a thorough understanding of library management, policies and budgeting.
- Has a sense of where the library has been and where it needs to go.
- Embraces change and innovation in order to move the library forward.
- Stays up to date about library law and related laws and keeps the board informed.
- Sets priorities which appropriately reflect community needs.

Rating: **4** **3** **2** **1**

Comments:

2018 Goals Evaluation

- By November 30, 2018, I will have worked with a consultant, community groups, library staff, and the Board of Trustees to write a library strategic plan covering 2019-2021.
- By the end of 2018, I will have reached out and met with at least three community groups to promote the library and its services.
- By the end of 2018, I will develop a full understanding of Waukesha Public Library operations, including policies, practices and procedures, both those directly serving the public and internally.
- By the end of 2018, I will have written a project plan that will address the steps and dates needed to form a library foundation

Rating: **4** **3** **2** **1**

Comments:

Overall Performance Rating

Based upon the preceding comments and evaluations, indicate the rating which best describes the Library 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.

_____Exceeds Expectations (4)

_____Unacceptable (1)

_____Meets Expectations (3)

_____Needs Improvement (2)

What strengths did the Library Director exhibit throughout the review period?

What specific recommendations do you have for the Library Director to improve performance?