

# 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

*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:

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: