**PART I**

3 Exceeds Expectations: Director has gone beyond what you would expect.

2 Meets Expectations: Director meets all or most of what you expect.

1 Does Not Meet Expectations: Director is not working at a level acceptable to you.

0 No Information: You have not had an opportunity to observe these behaviors.

**Category 1: Organizational Leadership**

|  |  |  |  |
| --- | --- | --- | --- |
| 5 | **3** | **Exceeds Expectations** | **Competency Description**   * Understands and implements the mission of the organization. * Works as an advocate for the organization before RAILS, Illinois State Library, SWAN members, and the general public. * Stays current with new ideas and trends among libraries. * Effective decision maker: gathers input, makes timely decisions and communicates results. * Proactive problem solver. * Articulates a guiding vision. |
| 1 | **2** | **Meets Expectations** |
|  | **1** | **Does Not Meet Expectations** |
|  | **0** | **No Information** |
|  |  |  |
| **Behavioral Evidence: Aaron has done a great job of keeping SWAN’s mission and vision in focus while actively participating in RAILS, State Library Committees and with others in the Library and ILS community.**  **Aaron has made SWAN a true leader in the State, communicating the group’s needs and ideas for improvement of the overall discovery and reciprocal borrowing ability of our patrons. Aaron continues to show strong leadership with the issues facing the consortia and continues to grow in his decision making and communication skills.** | | | |

**Category 2: Business and Financial Management**

|  |  |  |  |
| --- | --- | --- | --- |
| 4 | **3** | **Exceeds Expectations** | **Competency Description**   * Keeps informed about financial needs of the organization. * Understands and supervises the financial accounting programs for the organization. * Ensures that organization funds are spent appropriately, always in the best interest of those we serve. * Provides the board accurate, understandable information about the financial status of the organization through regular financial reports. * Makes well-supported budgeting recommendations to the board. * Assists the board in keeping the organization financially sound. * Explores and proposes to the board new potential sources of finance for programs and services. * Plans and organizes work effectively. * Ensures that all governmental and legal requirements of the organization are met. |
| 2 | **2** | **Meets Expectations** |
|  | **1** | **Does Not Meet Expectations** |
|  | **0** | **No Information** |
|  |  |  |
| **Behavioral Evidence: Aaron has shown sound judgment and has asked for help from accountants when needed to align and explain finances and has shown growth in this area. This budget has been more strongly guided by Aaron than in the past. He is taking the initiative and has kept the board informed along the way. He has worked very well with accounting support to provide excellent financial reporting that properly reflects the current position of SWAN and is consistent with GASB requirements.** | | | |

**Category 3: Customer Service**

|  |  |  |  |
| --- | --- | --- | --- |
| 3 | **3** | **Exceeds Expectations** | **Competency Description**   * Understands the needs of the organization's customers and community and seeks to fill those needs with the organization's programs and community services. * Gains respect and support of other persons and organizations who come in contact with our organization. * Articulates clear vision to staff about the paramount importance of customer service and models best practices behavior. |
| 3 | **2** | **Meets Expectations** |
|  | **1** | **Does Not Meet Expectations** |
|  | **0** | **No Information** |
|  |  |  |
| **Behavioral Evidence: Aaron has dramatically increased SWAN’s customer service and has clearly lead the SWAN staff toward a much appreciated focus on their position as service providers. Positions have been designed or re-designed with the overlay of segments of service rather than that of organizational convenience.**  **Aaron has made SWAN much more of a participating member of the teams of consortia in Illinois seeking to serve all of our patrons better.** | | | |

**Category 4: Relationship with the Board**

|  |  |  |  |
| --- | --- | --- | --- |
| 5 | **3** | **Exceeds Expectations** | **Competency Description**   * Keeps board members informed about issues, needs and operation of this Iibrary. * Offers direction to the board when needed on issues requiring board action and makes appropriate recommendations based on thorough study and analysis. * Interprets the intent of and executes board policy. * Seeks and accepts from the board and constructive criticism of work. * Supports board policy and actions to staff, customers and the public. * Understands his/her role in administration of board policy. |
| 1 | **2** | **Meets Expectations** |
|  | **1** | **Does Not Meet Expectations** |
|  | **0** | **No Information** |
|  |  |  |
| **Behavioral Evidence: Aaron has a great working relationship with his board members. He has consistently sought board guidance on important issues, such as moving Office Manager position to full time, and financial management decisions. I like the growth that Aaron has shown in this area. Last evaluation the board asked Aaron to make more recommendations to us and to take more initiative. Having worked on the agenda’s with him over the past year I can see that he has eliminated unnecessary Director decisions and is focusing the board on more board related decisions. Recommendations are well prepared and explained. Board decisions are immediately disseminated and implemented.** | | | |

**Category 5: Personal Characteristics that Impact Job Performance**

|  |  |  |  |
| --- | --- | --- | --- |
| 5 | **3** | **Exceeds Expectations** | **Competency Description**   * Maintains high standards of ethics, honesty and integrity in personal and professional relationships. * Works well with individuals and groups. * Exercises good judgment in arriving at decisions. * Maintains poise and emotional stability in the full range of professional activities. * Writes clearly and concisely. * Responds well when faced with unexpected/disturbing situations. * Remains open to ideas, suggestions and criticism from the board. * Admits mistakes. * Intellectually curious. |
| 1 | **2** | **Meets Expectations** |
|  | **1** | **Does Not Meet Expectations** |
|  | **0** | **No Information** |
|  |  |  |
| **Behavioral Evidence: Aaron has shown himself to be a true professional and his character is unimpeachable! He sees the “big picture,” keeps an open mind, admits mistakes when they happen and works towards resolving them instead of letting them fester. His integrity and straightforward nature provides our organization with excellent, up to date, communication of actions being taken as well as impacts on SWAN of new developments.**  **I have never observed anything but an open, honest approach to dealing with SWAN members or the board. He always handles question and discussion at Committee of the Whole meetings with grace and tact. I think in all of these areas Aaron is strong. My only concern lies in his work ethic. I feel that sometimes he may overextend himself. At first I thought that it was just the environment we were in with the merger, but now that we are out of that environment and deep in the ILS selection I am continuing to see it. I would like him to work on delegation, stepping back and not overcommitting.** | | | |

**Category 6: Personnel/Management and Development**

|  |  |  |  |
| --- | --- | --- | --- |
| 2 | **3** | **Exceeds Expectations** | **Competency Description**   * Justifies the need for staff development funds, actively campaigns for them and accounts for their use. * Analyzes staff functioning periodically with the object of creating the greatest efficiencies. * Emphasizes equal opportunity employment and affirmative action hiring practices. * Delegates authority and efficiently organizes the work of personnel. * Inspires staff to do their best work by acting as supporter and motivator; providing necessary resources, encouragement and appreciation. * Addresses performance issues and takes actions necessary to correct problems, both with staff and him/herself. |
| 4 | **2** | **Meets Expectations** |
|  | **1** | **Does Not Meet Expectations** |
|  | **0** | **No Information** |
|  |  |  |
| **Behavioral Evidence: The decisions and actions that Aaron has made to reorganize SWAN personnel have come a long way to making our organization more efficient. Within the context of the restrictions and liabilities inherent in managing people transitioned from a State institution, Aaron has done very well. I expect we will continue to see improvement in the efficient administration of SWAN. Aaron (and Brande) have done an excellent job managing staff and creating new personnel policies.**  **Aaron has done a great job on improving his management skills. He has rebuilt his team and the overall morale of his staff and the atmosphere at Swan has improved dramatically. I would like to see him work on delegation, efficiencies and would also like to be sure that he is indeed actively campaigning for the staff he needs.** | | | |

**Category 7: Innovation/Improvement**

|  |  |  |  |
| --- | --- | --- | --- |
| 5 | **3** | **Exceeds Expectations** | **Competency Description**   * Seeks out and promotes change that will better serve patrons and members. * Constantly pushes to improve efficiency & effectiveness. * Demonstrates concern about quality and getting better results. * Functions well in fast-paced, changing environment. * Anticipates change and develops appropriate coping strategies. * Actively works on personal development; seeks out feedback on how to improve. * Responds effectively and proactively to organizational changes. * Accomplishes responsibilities with superior outcomes. * Demonstrates resolve and urgency to get things done. * Commits to reach timely and successful closure on work. * Strong work ethic; does whatever it takes to get the job done. * Drives to excel in all matters. * Participates in conferences and training. * Stays abreast of current trends and makes recommendations to the board. |
| 1 | **2** | **Meets Expectations** |
|  | **1** | **Does Not Meet Expectations** |
|  | **0** | **No Information** |
|  |  |  |
| **Behavioral Evidence: Aaron has done exceptionally well in pursuing innovation in technological infrastructure, organizational service channels, and not least in pursuing increasingly better financial arrangements with vendors. Aaron’s leadership in constructive, well-planned innovation is certainly a model for other administrators.** | | | |

**Category 8: Planning and Problem Solving**

|  |  |  |  |
| --- | --- | --- | --- |
| 5 | **3** | **Exceeds Expectations** | **Competency Description**   * Works with SWAN Council to establish strategic goals that enable the organization to better serve the community and anticipate future needs. * Supports a vision that keeps the organization current and knowledgeable in technology, programming and services. * Establishes clear long and short term objectives that are attainable and promote betterment of the organization. |
| 1 | **2** | **Meets Expectations** |
|  | **1** | **Does Not Meet Expectations** |
|  | **0** | **No Information** |
|  |  |  |
| **Behavioral Evidence: Excellent work on the ILS selection process; has shown an excellent grasp of the short and long term implications of the decision that will be made. I stand in awe of Aaron’s planning and problem solving abilities! He approaches planning not simply with a stepped approach to securing an objective, but most importantly incorporating continual inquiry into the consequences of each step of a transition. Aaron’s planning clearly keeps the objectives integral to SWAN’s mission and vision. Excellent work on the ILS selection process; has shown an excellent grasp of the short and long term implications of the decision that will be made.** | | | |

**Category 9: Interpersonal Effectiveness**

|  |  |  |  |
| --- | --- | --- | --- |
| 5 | **3** | **Exceeds Expectations** | **Competency Description**   * Establishes rapport and maintains productive relationships with subordinates, board, members and community. * Handles differences openly, candidly and constructively with the best interests of the organization in mind. * Seeks input from others; creates a collegial atmosphere where ideas and information are easily exchanged. * Willingly accepts responsibility for actions and eagerly gives credit to staff. * Creates strong, collaborative work groups focused on attaining superior results. * Encourages a culture of open communication. |
| 1 | **2** | **Meets Expectations** |
|  | **1** | **Does Not Meet Expectations** |
|  | **0** | **No Information** |
|  |  |  |
| **Behavioral Evidence: Always collegial and congenial in dealings with SWAN members. Quick to credit SWAN staff for positive accomplishments. Quick to accept responsibility for any organizational shortcomings. Aaron exhibits ease and approachability with all members of SWAN and is clearly interested in member feedback and ideas.**  **He takes full responsibility for SWAN and has established strong groups of service providers within the organization. I think the culture of SWAN has changed under his leadership. Aaron has been instrumental in rebuilding Swan from a semi-dysfunctional entity into a well-run organization. I appreciate his efforts to work openly, candidly and constructively with the board, his staff and the membership.** | | | |

**PART II**

**Describe 3-5 areas where performance is particularly effective:**

1. Strong organizational and planning skills.
2. Communicates effectively and able to communicate technical concepts in layman’s terms.
3. Transitioning the board to a board role and effectively taking over Executive Director responsibilities.
4. Technologically ahead of the curve; knows what is coming and is ready to adopt or adapt for SWAN.
5. Organizational administration and finance
6. Team player
7. Dedication to the success of the organization
8. Financial Planning and Budget
9. Representing SWAN with other consortia, RAILS and the Illinois State Library

**Describe 3-5 areas where performance could be more effective:**

1. Increase visits to member libraries to enhance strengthening of member bonds.
2. Delegation to staff as well as not overextending himself.
3. Advocating for staff needs.
4. Continue the work you are already doing with the staff culture specifically in regards to customer service.
5. Continued leadership in bibliographic systems – good work on Skyriver. Need to guide members and staff to innovate in this arena.
6. Continue to develop your management skills by attending workshops offered by the Management Association.
7. Continue to keep the flow of information of open and encourage your staff to do the same.
8. Answering member questions directly.