

**SWAN Services
Executive Director Evaluation**

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

7	3	Exceeds Expectations	Competency Description <ul style="list-style-type: none"> 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.
	2	Meets Expectations	
	1	Does Not Meet Expectations	
	0	No Information	
Behavioral Evidence: Promotes rel w other consortia, sirsi summits, migration, future joint efforts Amazing leadership esp w ISP change leadership of SWAN. RAILS, other ILS groups proactive input requests and current knowledge led the most thorough & transparent process (ILS) ever ISL committee LLSAPs lead migration strong leadership of consortium selection of ILS and migration			

Category 2: Business and Financial Management

3	3	Exceeds Expectations	Competency Description <ul style="list-style-type: none"> 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.
4	2	Meets Expectations	
	1	Does Not Meet Expectations	
	0	No Information	
Behavioral Evidence: improved board reports, clear thinking on SWAN v RAILS Fin. worked on understanding fin. Brought in RAILS acct exceptional grasp of fin mgmt provides easy to follow fin info to board detailed presentation but needs more future disc RAILS acctg Communicates fin to board brings in acctnts to explain good budgeting but provide board w/more insight re:future rev			

Category 3: Customer Service

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5	3	Exceeds Expectations	Competency Description <ul style="list-style-type: none"> 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.
2	2	Meets Expectations	
	1	Does Not Meet Expectations	
	0	No Information	
Behavioral Evidence: excel. Response in member comm. Minimize chg anxiety wonderful service but rumblings on synch w/members strong suppt for service dept and outreach very concerned with cust sat Knows priorities committed to service models best practice excellent staff relations excellent reports Staff service level shows top down focus on service			

Category 4: Relationship with the Board

7	3	Exceeds Expectations	Competency Description <ul style="list-style-type: none"> Keeps board members informed about issues, needs and operation of this library. 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.
	2	Meets Expectations	
	1	Does Not Meet Expectations	
	0	No Information	
Behavioral Evidence: promotes collegial rel w board Draws on Board Exp great relations with SWAN Board highly informed in detail and summary excellent listener and explainer to board utilizes staff members to explain to board strong relations w/board allowed SWAN to move			

Category 5: Personal Characteristics that Impact Job Performance

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7	3	Exceeds Expectations	Competency Description <ul style="list-style-type: none"> • 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.
	2	Meets Expectations	
	1	Does Not Meet Expectations	
	0	No Information	
		few mistakes, owned them, sought board input handles tough questions w poise highly improved reputation of org with members versatile, masterful and congenial integrity, professionalism and commitment	
Behavioral Evidence: few mistakes, owned them, sought board input handles tough questions w poise highly improved reputation of org with members versatile, masterful and congenial integrity, professionalism and commitment			

Category 6: Personnel/Management and Development

5	3	Exceeds Expectations	Competency Description <ul style="list-style-type: none"> • 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.
2	2	Meets Expectations	
	1	Does Not Meet Expectations	
	0	No Information	
Behavioral Evidence: augments SWAN staff, good hiring decisions, delegation worked on new positions with immediate impact expertise with sub disciplines provide for excellent mgmt solid respect of staff recognizes talented people and motivates them excellent camaraderie of staff and mgmt good delegation and strong esprit de corps			

Category 7: Innovation/Improvement

5	3	Exceeds Expectations	Competency Description
2	2	Meets Expectations	

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	1	Does Not Meet Expectations	<ul style="list-style-type: none"> • 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.
	0	No Information	
<p>Behavioral Evidence: for ILS, involved in Sirsi group always aware of possibilities ideal bal of innovation and reliability seeking improvements, never complacent good planning on ILS more future focus after migration good leadership in selecting ILS</p>			

Category 8: Planning and Problem Solving

5	3	Exceeds Expectations	<p>Competency Description</p> <ul style="list-style-type: none"> • Works with SWAN Board 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.
2	2	Meets Expectations	
	1	Does Not Meet Expectations	
	0	No Information	
<p>Behavioral Evidence: strat plan continued well on tract w strat plan utmost care in planning and exec adept at planning and exec deals well with external factors while keeping SWAN on track</p>			

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Category 9: Interpersonal Effectiveness

7	3	Exceeds Expectations	<p>Competency Description</p> <ul style="list-style-type: none"> • 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.
	2	Meets Expectations	
	1	Does Not Meet Expectations	
	0		
<p>Behavioral Evidence: well established rapport honest and collaborative high moral within personnel and SWAN members exemplary strong partner, openness and willingness to listen</p>			

PART II

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

1. Staffing decisions, Delegation, membership communication
2. Strong personnel leadership, communicates well with consortia, handles questions at member meetings very well
3. excellent identification of personnel needs, exceptional complete planning, employee guidance and support
4. impressive on all fronts, excellent personal expression
5. personnel mgmt & development, communication clear and consistent, customer service
6. staff leadership & migration work, good working relations w/other orgs, current w/tech
7. leadership & team player, time management, organization and commitment

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

1. continue to develop knowledge of accounting practice
2. needs a clone
3. financial reporting - make clearer
4. dealing w/library directors Although some directors seem to prefer to deal w/board member(s)
5. develop and build budgeting and mgmt skills