



## Library CEO Performance Evaluation Form

This form is intended to guide the Library Board and Library CEO in discussing the nature of the CEO’s job, agree upon goals for the coming review period, and to evaluate the CEO’s job performance during the past review period. The final evaluation and the CEO’s comments (optional) will become part of the CEO’s employment record. The annual performance evaluation is one component of performance management, which includes ongoing feedback, coaching and development.

<b>CEO Name</b>	<b>Review Type</b>  <input type="checkbox"/> Annual Review <input type="checkbox"/> Probationary Review
<b>Library Board Chair</b>	<b>Date of Evaluation</b>

### SECTION I: PERFORMANCE LEVELS AND FACTORS

*Considering the expectations for the position based on the job description and using the following performance levels, use the appropriate rating that most closely describes the CEO’s performance of job responsibilities for each performance factor. A comment section after each section is provided for comments about applicable accomplishments, achievements of goals and development concerns/needs. The inclusion of specific examples and observations is required.*

*If a factor does not apply, please enter N/A in the appropriate space.*

*If a factor was not observed, please enter “Not Observed”.*

### PERFORMANCE RATINGS DESCRIPTIONS

**EE – Exceeds Expectations:** Contributions and high quality of work are widely recognized. The majority of performance outcomes routinely and consistently exceed defined expectations, producing important and impactful results for the Library through planning, execution and creativity. Projects and objectives are completed in a manner that expands the scope and impact of the assignment.

**ME – Meets Expectations:** The CEO is successful in performing the majority of job responsibilities and makes a solid, reliable and meaningful contribution to the Library. Performance is competent, efficient and effective along established expectations. Initiative, resourcefulness and good judgement are consistently exercised.

**NS – Needs Strengthening:** While the CEO’s performance is effective in some areas, there are areas in which performance is inconsistent and/or falls below established expectations. A performance development plan should be developed, or already in place, that defines performance objectives and strategies for achieving improvement.

**IR - Major Improvement Required:** Performance is not acceptable in critical areas of the job and falls below minimum expectations. Significant improvement is needed. A performance development plan should be developed, or already in place, that defines performance objectives and strategies for achieving improvement.

**CATEGORY 1: MEETING OPERATIONAL OBJECTIVES**

Criteria to consider:

1. Monitors and evaluates organizational effectiveness.
2. Analyzes and, where appropriate, streamlines existing rules and/or procedures for a more efficient operation.
3. Monitors and analyzes developments in relevant legislation and submits required reports.
4. Prepares an annual budget in consultation with both Library staff and Library Board members.
5. Monitors the expenditure of all Library budgets. Exercises control over these budgets where necessary.
6. Identifies and submits proposals for appropriate funding sources.
7. Monitors condition of physical plant. Initiates actions required to ensure building and grounds remain in good repair/condition.
8. Keeps current, regarding developments in information technology especially as they impact the operations of public libraries.
9. Work to ensure a beneficial relationship in a unionized environment

**Overall Rating:**

**Comments for this Performance Category**

**CATEGORY 2: PLANNING, ORGANIZATION AND PROBLEM SOLVING**

Criteria to consider:

1. Displays effective planning and organizational skills by gathering and analyzing relevant data, considering alternative courses of action and developing plans which include deadlines and accurate cost estimates.
2. Involves and works effectively with staff in the planning process.
3. Is able to implement plans effectively once a course of action is decided upon.
4. Demonstrates effective time management. Achieves timely and accurate results.
5. Anticipates and deals with problems before they become crises. Is flexible enough to respond creatively to unexpected problems.
6. Follows up to ensure that the problem has been solved. Evaluates the results to see if the approach followed is the most effective way to achieve the desired outcome.

**Rating:**

**Comments for this Performance Category**

**CATEGORY 3: PROFESSIONAL QUALITIES AND COMPETENCIES**

Criteria to consider:

- 1. Is aware of developments and changes in the profession.
- 2. Recognizes and adjusts to internal and external political realities. Willingly adapts to changes in the workplace, community and the broader environment.
- 3. Is conversant with applicable legislation (e.g. Public Libraries Act, municipal bylaws affecting libraries etc.).
- 4. Maintains a network of internal and external associates including professional affiliations.
- 5. Is aware of budget constraints and is able to provide and interpret the Library's financial data in an accurate and timely form.
- 6. Demonstrates a commitment to continuous learning in areas relevant to the performance of library CEO's duties.

<b>Rating:</b>	
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**Comments for this Performance Category**

**CATEGORY 4: MANAGEMENT OF HUMAN RESOURCES**

Criteria to consider:

1. Selects staff wisely.
2. Manages Library employees in accordance with the expectations of the Human Rights Code and relevant legislation (e.g. Employment Standards Act, etc.).
3. Directs staff toward the attainment of operational objectives.
4. Is able to achieve positive results based on the skills and knowledge of the Library's employees.
5. Delegates tasks appropriately within the limits of the skills and knowledge of the Library's employees.
6. Ensures that staff development is available for, and undertaken by Library employees. Is involved in both the selection of staff development activities and in evaluating the effectiveness of the programs undertaken.
7. Conducts regular performance evaluations of employees and provides them with clear and constructive feedback relating to their performance.
8. Encourages a climate of innovation leading to the implementation of productive and informed change for the betterment of Library operations.
9. In general, acts as a role model for the rest of the Library's employees.
10. Promotes teamwork.

**Rating:**

**Comments for this Performance Category**

**CATEGORY 5: INTERPERSONAL RELATIONS AND COMMUNICATIONS**

Criteria to consider:

1. Consistently communicates with those who need to know using appropriate communication techniques.
2. Consistently communicates rationale for decisions with those involved/affected.
3. Demonstrates flexibility when consensus is not readily attainable.
4. Is able to resolve conflict.
5. Is sensitive to the feelings and receptive to the ideas of others.
6. Gives due credit to others for their contributions and performance.
7. Maintains effective two-way communication channels within and outside the library system.
8. Maintains professional liaison with provincial and national library groups.
9. Establishes a friendly, facilitative and mutually respectful relationship with library customers.
10. Develops and uses various methods for assessing community needs to better serve existing customers and also attempt to engage current non-users.
11. Works effectively with various community agencies in co-operative program planning.

<b>Rating:</b>	
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**Comments for this Performance Category**

**CATEGORY 6: LIBRARY BOARD RELATIONS**

Criteria to consider:

1. Prepares the agendas for, and attends Library Board meetings.
2. Informs and advises the Board on all issues of substance requiring their attention.
3. Recommends policies, goals, objectives and plans to the Board.
4. Facilitates the effective functioning of the Board and its committees by providing reports and advice in a complete and timely manner.
5. Maintains effective lines of communication with Board members and keeps them informed of Library affairs.
6. Prepares and keeps records of the business and financial documents of the Board.
7. Handles Board correspondence.
8. Acts as a liaison between the Board and Library staff.
9. Implements and administers Library policies.
10. Promotes the Library with the community.
11. Promotes partnerships with organizations.

<b>Rating:</b>	
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**Comments for this Performance Category**

**CATEGORY 6: COMMUNITY RELATIONS**

Criteria to consider:

1. Promotes the Library with the community.
2. Promotes partnerships with local organizations and agencies.

**Rating:**

**Comments for this Performance Category**



**SECTION II: GOALS**

*(Completed by CEO and comments added by the Library Board as required)*

*Summarize the status of goals established during the last review period and described the performance goals established for coming review period.*

**Goals from the Previous Review Period**

**Goal #1: <Title and Description>**

**Measurement of Success:**

**Interim Success Target:**

**Current Status:**

**Review Comments / Observations:**

**Goal #2: <Title and Description>**

**Measurement of Success:**

**Interim Success Target:**

**Current Status:**

**Review Comments / Observations:**

**Goal #3: <Title and Description>**

**Measurement of Success:**

**Interim Success Target:**

**Current Status:**

**Review Comments / Observations:**

<b>Goal #4: &lt;Title and Description&gt;</b> <b>Measurement of Success:</b> <b>Interim Success Target:</b> <b>Current Status:</b> <b>Review Comments / Observations:</b>
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<b>Other Activities Not Identified in the Goals.</b>
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<b>Goals for the Upcoming Review Period</b>
<b>Goal #1: &lt;Title and Description&gt;</b> <b>Measurement of Success:</b>

<b>Goal #2: &lt;Title and Description&gt;</b> <b>Measurement of Success:</b>
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<b>Goal #3: &lt;Title and Description&gt;</b> <b>Measurement of Success:</b>
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<b>Goal #4: &lt;Title and Description&gt;</b> <b>Measurement of Success:</b>
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<b>SECTION V: CEO's COMMENTS AND SIGNATURE</b>	
<i>(To be signed by the CEO after Sections I-III are completed and the Library Board signed and dated.)</i>	
_____	_____
<b>CEO's Signature</b>	<b>Date</b>
<b><i>Please sign and return original to the Library Board Chair.</i></b>	

*Note: You are being asked to sign your evaluation to indicate you reviewed it and are aware of how the Library Board evaluated your performance. Your signature acknowledges that you have seen your evaluation and does not imply that you agree with it. If you do not agree with the evaluation, you may reply in writing, either on the reverse of this form or on additional pages. The signed evaluation and any written response becomes a part of your employment record.*

<b>HUMAN RESOURCES / PAYROLL ACTION REQUIRED</b>	
<b><i>To be Completed by the Library Board Chair.</i></b>	
<p><b>Salary Step Increase?</b>    <input type="checkbox"/> Yes    <input type="checkbox"/> No</p> <p><b>Directions:</b></p>	
_____	_____
<b>Board Chair's Signature</b>	<b>Date</b>

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