

**Annual Performance Appraisal – FY (YEAR)**

**Executive Library Director – (Director Name)**

**Missoula Public Library Mission:** *Spark Curiosity. Make Connections. Thrive Together.*

This **probationary performance appraisal** will be conducted at or before six months’ employment and conducted annually thereafter by the Missoula Public Library Board of Trustees. This review is divided into two sections. **Section 1** is a review of the Executive Director’s performance as it relates to the objectives laid out in the Strategic Plan. The Executive Director shall be evaluated based on the Library’s progress of implementing and furthering the Strategic Priorities as stated in the Strategic Plan. Evaluation will also be made on the Executive Director’s completion of stated Strategic Priority goals for personal, and Library growth from the prior review. **Section 2** is a review of the Executive Director’s performance as it relates to the position job description.

The following performance rating scale with points associated with each rating is utilized:

**Outstanding (5)** – Contributes overall extraordinary results well beyond what is expected of the position and makes remarkable contributions to their team and the organization. Exhibits exceptional effective work behaviors.

**Exceeds Expectations (4)** – Consistently contributes significantly above what is expected of the position and makes important contributions to their team and the organization, including continuous improvements. Substantially exhibits effective workplace behaviors.

**Meets Expectations (3)** – Consistently makes meaningful contributions to their team and the organization. Employee has met, or at times exceeded, overall expectations regarding role accomplishments in terms of quality, quantity, and timeliness. Consistently exhibits effective workplace behaviors.

**Needs Improvement (2)** – Employee has been inconsistent in achieving expected performance level and typically requires more guidance than necessary. May have demonstrated behaviors inconsistent with expectations. Has not been reliable at times and needs improvement.

**Unacceptable (1)** – Employee consistently underperforms and has provided inadequate value to their team and the organization. A Performance Improvement Plan may be considered at this time.

**Not Observed** **(N/O)** – There may be times that board of trustee members or those providing input have not observed specific duties of the role of Executive Library Director.

**SECTION 1 - Implementation of Strategic Priorities**

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| **STRATEGIC PRIORITY #1**  **Community Engagement** | **SCORE**  **(**From first page of this document – 5, 4, 3 2, 1, or N/O) |
| * Intentional Services to Priority Communities Through Outreach * More Welcoming Spaces for Indigenous Community Members, Teens, Refugees/Immigrants, and People with Disabilities * Diversified Collaborations and Increased Representation Organization-Wide * Community Centered Programming |  |
| **Board Comments:** | |
| **Library Executive Director Comments:**  **Personal Goal for the next year:**  **Library Goal for the next year:** | |
| **STRATEGIC PRIORITY #2**  **Core Services** | **SCORE**  **(**From first page of this document – 5, 4, 3 2, 1, or N/O) |
| * Easier Access to Materials and Services * Increased Accuracy and Speed in Circulation Functions * Renewed Commitment to Providing Patrons Accurate Information * Improved Response to Emerging Technologies, Service Automation, and Privacy Needs * Staff Engagement * More Diverse, Relevant, and Current Collections |  |
| **Board Comments:** | |
| **Library Executive Director Comments:**  **Personal Goal for the next year:**  **Library Goal for the next year:** | |
| **STRATEGIC PRIORITY #3**  **Sustainability and Wellness** | **SCORE**  **(**From first page of this document – 5, 4, 3 2, 1, or N/O) |
| * Certification in the Sustainable Libraries Initiative Program * Streamlined Health/Wellness Resources, Library-Based Social Services, and Economic Sustainability Tools * An MPL Action Plan for Renewable Energy Use and Energy Efficiency in Conjunction with Community-Wide Carbon Neutrality Goals * Expert Management of Downtown Library’s Environmental Systems, Architectural Engineering, and Design Elements |  |
| **Board Comments:** | |
| **Library Executive Director Comments:**  **Personal Goal for the next year:**  **Library Goal for the next year:** | |

**SECTION 2 - Review of Duties Described in Position Job Description**

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| **ESSENTIAL FUNCTIONS**  The following are intended to illustrate typical duties; they are not meant to be all-inclusive or restrictive. | **SCORE**  **(**From first page of this document – 5, 4, 3 2, 1, or N/O) |
| **Function #1:** Builds and maintains positive and effective relationships with key stakeholders including Board of Trustees, Public Library Foundation, Friends of the Public Library, library in-house partners (AUOR, or All Under One Roof partners), local government leaders, business leaders, and non-profit organizations. Respects the individuality and diversity of others. |  |
| **Board Comments:** | |
| **Library Executive Director Comments:** | |
| **ESSENTIAL FUNCTIONS**  The following are intended to illustrate typical duties; they are not meant to be all-inclusive or restrictive. | **SCORE**  **(**From first page of this document – 5, 4, 3 2, 1, or N/O) |
| **Function #2:** Either directly or through subordinate supervisors leads staff in accordance with human resources policies and/or collective bargaining agreement including hiring, training, evaluating, and disciplining in accordance with policies. Mentors and develops a strong leadership team. Delegates authority and responsibility appropriately. Is approachable and able to problem solve with staff. |  |
| **Board Comments:** | |
| **Library Executive Director Comments:** | |

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| **ESSENTIAL FUNCTIONS**  The following are intended to illustrate typical duties; they are not meant to be all-inclusive or restrictive. | **SCORE**  **(**From first page of this document – 5, 4, 3 2, 1, or N/O) |
| **Function #3:** Demonstrates knowledge of current state-of-the-art service delivery, technical processes, and library automation and management. Makes adjustments as needed to accommodate significant changes in demand. Consults effectively with the board, foundation, academic institutions, citizens, and community groups as appropriate. |  |
| **Board Comments:** | |
| **Library Executive Director Comments:** | |
| **ESSENTIAL FUNCTIONS**  The following are intended to illustrate typical duties; they are not meant to be all-inclusive or restrictive. | **SCORE**  **(**From first page of this document – 5, 4, 3 2, 1, or N/O) |
| **Function #4:** Has become knowledgeable about the library’s budget. Identifies potential revenue sources and works with the board on financial objectives. Prepares monthly financial reports for board review. Works with Public Library Foundation to support donor stewardship, establish new donor relationships, and assist in implementation of fundraising activities. Seeks and prepares appropriate grant funding. |  |
| **Board Comments:** | |
| **Library Executive Director Comments:** | |
| **ESSENTIAL FUNCTIONS**  The following are intended to illustrate typical duties; they are not meant to be all-inclusive or restrictive. | **SCORE**  **(**From first page of this document – 5, 4, 3 2, 1, or N/O) |
| **Function #5:** As part of a public presence, attends bi-annual meetings of the Montana Shared Catalog Consortium. Participates in regional and state-wide professional associations. |  |
| **Board Comments:** | |
| **Library Executive Director Comments:** | |
| **ESSENTIAL FUNCTIONS**  The following are intended to illustrate typical duties; they are not meant to be all-inclusive or restrictive. | **SCORE**  **(**From first page of this document – 5, 4, 3 2, 1, or N/O) |
| **Function #6:** Miscellaneous. This may include ideas for goals, progress toward establishing a strategic plan, future partnerships, use of the library building, fundraising ideas, etc. | *No score needed for this function.* |
| **Board Comments:** | |
| **Library Executive Director Comments:** | |

**Signed and acknowledged:**

This annual performance appraisal was given to the Library Executive Director on .

(Date)

Board Chair Signature Date

Slaven Lee, Library Executive Director Date

Send a signed copy of the evaluation to the Missoula County Human Resources Director.