

# Assessment Tool

## For Connecticut Library Boards

It is important for Library Boards to engage in self-assessment to identify how they are performing, that is, how well they are fulfilling their roles and responsibilities and where they might improve.

We, the Executive Board of the Association of Connecticut Library Boards have developed the attached self-assessment instrument to assist your Library Board in determining its strengths and weaknesses. We recommend that an assessment be undertaken every two years.

In recognition of Connecticut various types of boards, that is, governing or advisory we have refrained from being too specific in some areas. Each Board should tailor the assessment to best serve their needs.

Although we have written this instrument for the Board to self-assess we also recommend that individual board members assess themselves anonymously to gain insight into their own personal performance.

Boards have fiscal and administrative decisions to make which effect the functioning of their library. A self-assessment will enable a Board to obtain the information necessary to make decisions as a Board.

The attached instrument is divided into key sections with sub-categories in each. The assessment does not need to be administered in one sitting. Please divide it into sections as convenient for the Board.

The individual items should be evaluated using a five-point scale:

1. Needs improvement
2. Marginal
3. Acceptable
4. Excellent
5. Do not know

<b><u>General Knowledge</u></b>	<b>Needs improvement</b>	<b>Marginal</b>	<b>Acceptable</b>	<b>Excellent</b>	<b>Do not know</b>
Board members know the history of the library	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board members know the library's mission statement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board members are familiar with the strategic plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board members are familiar with the library's policies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board members understand their role and responsibilities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board members are familiar with the organizational structures of the library and operate in accordance with board bylaws and any relevant charters	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board members are familiar with the union contracts covering library staff if applicable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board members are familiar with Library Director's contract if applicable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board members have reviewed the <b><i>ACLB Public Library Trustee Handbook</i></b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Comments:</b>					

<b><u>Board Operation</u></b>	<b>Needs improvement</b>	<b>Marginal</b>	<b>Acceptable</b>	<b>Excellent</b>	<b>Do not know</b>
The agenda of board meetings is well planned	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The library director provides the Board with accurate information needed to make sound decisions approximately one week in advance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board members come to meetings prepared and on time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There is an orientation process for new members	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board meetings begin and end on time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The meeting agenda is followed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board members serve on committees as needed and contribute accordingly	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board members listen respectfully and encourage others to express their views	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Comments:</b>					

<b><u>Advocacy</u></b>	<b>Needs improvement</b>	<b>Marginal</b>	<b>Acceptable</b>	<b>Excellent</b>	<b>Do not know</b>
Board members promote the library	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board members are familiar with the library's advocacy plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board members are aware that a municipal board cannot fundraise	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Comments:</b>					

<b><u>Decision Making</u></b>	<b>Needs improvement</b>	<b>Marginal</b>	<b>Acceptable</b>	<b>Excellent</b>	<b>Do not know</b>
Board members support board decisions once they are made	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The library director is present and an active participant in the board meetings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Comments:</b>					

<b><u>Strategic Planning</u></b>	Needs improvement	Marginal	Acceptable	Excellent	Do not know
The Board understands community needs assessment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Board participates in the development of a strategic plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board members can effectively communicate the strategic plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board members are kept apprised of the library's progress on its strategic plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Comments:</b>					

<b><u>Policy Making</u></b>	Needs improvement	Marginal	Acceptable	Excellent	Do not know
The Board works with the library director to develop effective and relevant policies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Policies reflect the needs of the community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Board supports the library staff in the enforcement of library policies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Policies are reviewed annually and are readily available to staff and the public	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Comments:</b>					

<b><u>Finance</u></b>	<b>Needs improvement</b>	<b>Marginal</b>	<b>Acceptable</b>	<b>Excellent</b>	<b>Do not know</b>
The Board has financial oversight for the judicious expenditure of the budget	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board members are familiar with the library's budget	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Board works with the Library Director to develop the annual budget	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Board attends Board of Finance meetings to support the library budget	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board members can effectively communicate the library budget to interested parties	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Comments:</b>					

<b><u>Professional</u></b>	<b>Needs improvement</b>	<b>Marginal</b>	<b>Acceptable</b>	<b>Excellent</b>	<b>Do not know</b>
The Board is responsible for an evaluation of the Library Director	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board members attend trustee learning experiences/conferences as available	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Comments:</b>					

## **Plan of Action**

Reflect on your responses and comments. Record ideas and potential priorities for consideration as the Board creates an action plan in response to this self-assessment activity.

<b><u>Steps to Develop a Plan of Action</u></b>		<b>Completed</b>
1	Identify core deficiencies noted in the Board Assessment Tool	<input type="radio"/>
2	Identify resources and training: <ul style="list-style-type: none"><li>• ACLB website [<a href="https://aclb.wildapricot.org/">https://aclb.wildapricot.org/</a>]</li><li>• Contact ACLB for available consultation, training, and mediation</li><li>• United for Libraries [<a href="http://www.ala.org/united/">http://www.ala.org/united/</a>]</li></ul>	<input type="radio"/>
3	Schedule training, meeting, or review of resources to address deficiencies: <ul style="list-style-type: none"><li>• Establish timeline for training</li><li>• Ensure that all board members are present for training</li><li>• Determine outcome for training – address identified deficiency</li></ul>	<input type="radio"/>
4	Re-administer Board Assessment Tool to ensure all deficiencies are met	<input type="radio"/>
5	Schedule next Board Assessment	<input type="radio"/>