

**From:** [Natalie Schlegel](#)  
**To:** [Whitlock, Beth](#); [Pryor, Barbara](#); [Ingrid Mayyasi](#); [Gordon, Lily](#); [Alan Gordon](#)  
**Cc:** [Green, Esme](#); [Thibeault, Emelia](#)  
**Subject:** library director evaluation  
**Date:** Sunday, March 13, 2022 11:28:05 AM  
**Attachments:** [LIBRARY Director Performance Evaluation 2014 FINAL.doc](#)  
[Library Director Performance Appraisal.pdf](#)  
[Annual Review Discussion Outline.docx](#)  
[Evaluating the Director from Handbook.docx](#)  
[Director Evaluation sample 4.doc](#)  
[Director Evaluation sample 3.doc](#)  
[Director Evaluation sample 2.doc](#)

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Hello fellow Trustees,  
Attached are the sample documents that Maura Deedy, Library Advisor Specialist at MBLC shared with me. I also was in touch with Rob Favini, Director of Library Advisory and Development at MBLC and he pointed us to page 28 of the MBLC Director Search Process packet for a good sample evaluation: [https://guides.mblc.state.ma.us/ld.php?content\\_id=1537431](https://guides.mblc.state.ma.us/ld.php?content_id=1537431)

As I shared in our last meeting, rather than picking a form and completing it right away, our aim should be to create a sound evaluation **process and timeline**, with input from the Library Director and the Town Manager, that will be repeated annually.

I apologize for the delay in sharing these documents!

Thanks,

Natalie

----- Forwarded message -----

**From:** **Deedy, Maura (BLC)** [REDACTED]  
**Date:** Tue, Feb 15, 2022 at 4:29 PM  
**Subject:** RE: library director evaluations  
**To:** Natalie Schlegel [REDACTED], Favini, Robert (BLC)  
[REDACTED]

Hello Natalie,

Thanks for reaching out. I hope to add that one to the upcoming Deep Dives in March through June. [REDACTED]

The question of evaluating and open meeting law is a good one, and tricky. There are a few ways to approach it.

One is to establish the goals and metrics with the library director- this ensures transparency in the process.

When it comes time to evaluate, board members may receive an evaluation scorecard and evaluate the library director on the established metrics. If using a 1 to 5, or meets/exceeds etc matrix- having clear information for board members about what each metric means, to ensure consistency and reduce bias. There may be space to provide comments. It would be asked that the library director also conduct a self-evaluation as well- using the same tool. Some libraries may ask the staff to evaluate the library director. Any staff feedback should be combined, for anonymity.

These evaluations could be sent to a third party, like an HR director, if possible, to aggregate the scores in the categories and provide space for written comments. These could also be sent to a single board member who would aggregate them. Boards could review the evaluation in open meeting with the Director. I have heard in some cases the chair of the board will deliver the evaluation to the library director separately, outside of open meeting, however I am not certain on the legality of this. I would consult with AG's office on OML about this.

I have attached some of the sample evaluations we have to help guide you. See what works and combine them into a single tool. Communication is always important, so be sure to include the library director in the process and conversations.

I hope this helps as a starting point, and thank you for your patience!

Maura

Open Meeting Law FAQ on Evaluations:

<https://www.mass.gov/info-details/frequently-asked-questions-about-the-open-meeting-law#frequently-asked-questions-about-evaluations->

From MMA: Re-evaluating Your Employee Evaluations

Presentation by Joellen Cademartori, CEO of GovHR USA, at MMA Annual Meeting, Jan. 25, 2020

Personnel Management Presentation

[https://41g41s33v added2vc05w415s1e-wpengine.netdna-ssl.com/wp-content/uploads/2020/02/AM20\\_Re-evaluatingPerformanceEvaluation\\_GovHRUSA.pdf](https://41g41s33v added2vc05w415s1e-wpengine.netdna-ssl.com/wp-content/uploads/2020/02/AM20_Re-evaluatingPerformanceEvaluation_GovHRUSA.pdf)

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**From:** Natalie Schlegel <[REDACTED]>  
**Sent:** Tuesday, February 8, 2022 10:00 PM  
**To:** Deedy, Maura (BLC) <[REDACTED]>; Favini, Robert (BLC) <[REDACTED]>  
**Subject:** Fwd: library director evaluations

CAUTION: This email originated from a sender outside of the Commonwealth of Massachusetts mail system. Do not click on links or open attachments unless you recognize the sender and know the content is safe.

Dear Rob and Maura,

I am a Trustee in Sudbury, MA. As a relatively new Trustee, I have benefitted from your MBLC webinars, thank you very much! Our board has recognized that we have not evaluated our library director in quite a few years. We are looking for best practices on how to conduct an evaluation process. Specifically our Board is wondering HOW evaluation should be conducted. Our suggestion that it could be done in Executive Session was corrected by our Town Counsel who advised that evaluations focused on performance should be discussed in an open meeting. Is this your understanding as well? Can you advise how typical elected boards conduct evaluations?

Could you advise what evaluations look like in practice? Do board members collaborate to produce a written evaluation in a public meeting? Do they individually complete evaluations outside of meeting times that are then compiled and discussed? How do boards navigate the sensitivity of all involved?

Could you point me to some sample evaluation documents or processes? I searched the archive but only found one chain that asked about whether a standard town evaluation form was used or not.

I noticed there was a training scheduled on this topic recently but I believe it was cancelled, what a pity! Thank you very much for your time!

Natalie

Natalie Schlegel

[REDACTED]

Sudbury, MA

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Natalie Schlegel

[REDACTED]