

CHAPTER 3 TRY THIS: LIBRARY TRUSTEE SELF ASSESSMENT

Regular **self-assessment** ensures that trustees are accountable to the organization and its stakeholders. Take a moment to complete the Library Trustee Self-Assessment on the following pages. You will use your responses as you navigate the next chapter to identify strengths, opportunities, aspirations, and results.

LIBRARY TRUSTEE SELF ASSESSMENT

BOARD DOCUMENTS

(*ITEMS ARE STATUTORILY REQUIRED)

Bylaws*	☐ We have	☐ I can locate
	☐ The public can access without a CORA Request	
Strategic Plan/Strategic Priorities	☐ We have	☐ I can locate
	☐ The public can access without a CORA Request	
Financial Plan	☐ We have	☐ I can locate
	☐ The public can access without a CORA Request	
Capital Plan	☐ We have	☐ I can locate
	☐ The public can access without a CORA Request	
Financial Audit*	☐ We have	☐ I can locate
	☐ The public can access without a CORA Request	
Library Policies*	☐ We have	☐ I can locate
	☐ The public can access without a CORA Request	
Annual Report	☐ We have	☐ I can locate
	☐ The public can access without a CORA Request	

LEADERSHIP

I can share the goals of the library's strategic plan or strategic priorities.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

I can share with others our library's current actions towards the strategic plan or strategic priorities.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

I know the library's core values and ethical standards that drive my decision making.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

I visit the library and participate in library programs or events.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

I promote the library with local community leaders, stakeholder groups, or public officials by sharing our impact and relevance at least 2 times a year.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

I have established a relationship with my local and state representatives, and discuss library issues with them, advocating for their support.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

I belong to a state or national library organization and/or attend conferences.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

I can share the goals of the library's strategic plan or strategic priorities.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

I have read one or more national library organization journals or blog posts over the past six months.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

I am aware of legislation, trends, issues, and emerging risks affecting public libraries.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

GOVERNANCE

Bylaws are followed.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

Library policies allow effective management and legal compliance.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

I am a member of a board committee.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

I understand and respect the distinct roles and duties of the library director, the library board, the Foundation, and Friends.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

I route my requests of staff through the library director.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

The library director is consistently evaluated.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

A compensation review has occurred.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

I am prepared for board and committee meetings by reviewing the board packet prior to meetings so I can ask relevant questions and make better decisions.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

I meet my attendance obligation for board and committee meetings.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

I ask relevant questions and contribute to discussion about library business during board and committee meetings.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

After speaking, I allow all other trustees to speak before speaking again.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

STEWARDSHIP

I am able to answer questions about the expenses and revenue of the budget.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

I am aware of our reserve funds, rough amounts, and purpose behind.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

I review at least quarterly the budget to actuals and spending to know the financial standing of the library and where funds are being spent.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

I can summarize the key findings including the financial picture and recommendations of the library.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

MANAGEMENT

I seek out and recommend potential trustees.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

I participate in orienting new trustees.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

I follow through on my board commitments.

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain

I support other trustees by ... (Fill in the blank)

☐ Yes ☐ Sometimes ☐ No ☐ Uncertain
