

**XAVIER UNIVERSITY OF LOUISIANA
DEPARTMENT OF HUMAN RESOURCES**

**PERFORMANCE EVALUATION PLAN
FOR
EXEMPT MANAGERIAL AND SUPERVISORY EMPLOYEES**

Name of Employee _____

Job Title _____

Department _____

___ Probationary Evaluation Evaluation Period From _____ To _____

___ Annual Evaluation Evaluation Period From _____ To _____

RATING SCALE DEFINITIONS

- 3** **Exceeds expectation:** Consistently exceeds expectations, demonstrates overall excellence.
- 2** **Meets expectations:** Consistently meets expectations, performs required responsibilities.
- 1** **Unsatisfactory:** Fails to meet expectations.
- N/A** **Not applicable:** Category description does not apply to the employee.
-

PROFICIENCIES
ADMINISTRATIVE MANAGEMENT

| | | | | | |
|----|---|---|---|---|-----|
| 1. | Understands and develops long range and short range goals in accordance with the university's and department's mission. | 3 | 2 | 1 | N/A |
| 2. | Plans own work and the work of staff to achieve the goals of the department and university. | 3 | 2 | 1 | N/A |
| 3. | Understands university and department guidelines, policies and procedures. | 3 | 2 | 1 | N/A |
| 4. | Completes assignments and tasks accurately and on time. | 3 | 2 | 1 | N/A |

ADMINISTRATIVE MANAGEMENT (cont'd.)

| | | | | | |
|-----|---|---|---|---|-----|
| 5. | Initiates appropriate actions to overcome challenges or problems which hinder the achievement of goals. | 3 | 2 | 1 | N/A |
| 6. | Proficient in using technology to complete assignments. | 3 | 2 | 1 | N/A |
| 7. | Identifies and analyzes problems and develops appropriate solutions. | 3 | 2 | 1 | N/A |
| 8. | Exercises good judgment in making decisions. | 3 | 2 | 1 | N/A |
| 9. | Uses university resources in an efficient manner. | 3 | 2 | 1 | N/A |
| 10. | Understands and correctly interprets laws and regulations relating to area of responsibility. | 3 | 2 | 1 | N/A |
| 11. | Completes planning documents and assessment reports in a timely manner. | 3 | 2 | 1 | N/A |

SUPERVISORY MANAGEMENT

| | | | | | |
|----|---|---|---|---|-----|
| 1. | Selects qualified employees and maintains approved staffing levels. | 3 | 2 | 1 | N/A |
| 2. | Creates a work environment that is conducive for employees to achieve their goals and effectively complete their assignments. | 3 | 2 | 1 | N/A |
| 3. | Treats all employees fairly with regard to work assignments, training and opportunities for advancement. | 3 | 2 | 1 | N/A |
| 4. | Ensures that employees have appropriate technology, equipment and supplies to complete assignments and tasks. | 3 | 2 | 1 | N/A |

SUPERVISORY MANAGEMENT (cont'd.)

| | | | | | |
|----|---|---|---|---|-----|
| 5. | Approves personnel actions in a timely manner. | 3 | 2 | 1 | N/A |
| 6. | Manages work schedule and assignments of staff. | 3 | 2 | 1 | N/A |
| 7. | Approves employee time records in a timely manner. | 3 | 2 | 1 | N/A |
| 8. | Ensures that leave is correctly recorded in timekeeping keeping system. | 3 | 2 | 1 | N/A |

FISCAL MANAGEMENT

| | | | | | |
|----|---|---|---|---|-----|
| 1. | Understands and effectively manages approved budget. | 3 | 2 | 1 | N/A |
| 2. | Makes competent fiscal decisions regarding expenditures. | 3 | 2 | 1 | N/A |
| 3. | Initiates and processes requisitions and invoices in a timely manner. | 3 | 2 | 1 | N/A |
| 5. | Adheres to university travel policies and procedures. | 3 | 2 | 1 | N/A |

COLLEGIALITY

| | | | | | |
|----|---|---|---|---|-----|
| 1. | Interacts with faculty, staff and students by exercising mutual respect, honesty and integrity. | 3 | 2 | 1 | N/A |
| 2. | Works effectively with others to achieve department or university goals. | 3 | 2 | 1 | N/A |

CUSTOMER SERVICE SKILLS

| | | | | | |
|----|---------------------------------------|---|---|---|-----|
| 1. | Responds courteously to all inquires. | 1 | 2 | 3 | N/A |
|----|---------------------------------------|---|---|---|-----|

CUSTOMER SERVICE SKILLS

| | | | | | |
|----|--|---|---|---|-----|
| 2. | Responds to electronic, written and verbal contacts accurately and in a timely manner. | 3 | 2 | 1 | N/A |
| 3. | Able to manage crisis situations. | 3 | 2 | 1 | N/A |

COMMUNICATIONS

| | | | | | |
|----|---|---|---|---|-----|
| 1. | Composes effective and grammatically correct correspondences and reports. | 3 | 2 | 1 | N/A |
| 2. | Expresses oneself clearly and effectively. | 3 | 2 | 1 | N/A |
| 3. | Makes effective presentations at meetings. | 3 | 2 | 1 | N/A |

BEHAVIORIAL SKILLS

| | | | | | |
|----|---|---|---|---|-----|
| 1. | Complies with university, and department guidelines for attendance and punctuality. | 3 | 2 | 1 | N/A |
| 2. | Willing to work beyond scheduled work hours when required. | 3 | 2 | 1 | N/A |
| 3. | Willing to adapt to changes in policies, procedures and supervision. | 3 | 2 | 1 | N/A |
| 4. | Wears appropriate attire for work. | 3 | 2 | 1 | N/A |

PROFESSIONAL DEVELOPMENT

| | | | | | |
|----|--|---|---|---|-----|
| 1. | Maintains membership in professional organizations. | 3 | 2 | 1 | N/A |
| 2. | Attends seminars, conferences or workshops to keep current in areas of responsibility. | 3 | 2 | 1 | N/A |

PROFESSIONAL DEVELOPMENT (cont'd)

| | | | | | |
|----|---|---|---|---|-----|
| 3. | Keeps current with trends in profession. | 3 | 2 | 1 | N/A |
| 4. | Acquires and utilizes new knowledge and technology. | 3 | 2 | 1 | N/A |

SAFETY

| | | | | | |
|----|--|---|---|---|-----|
| 1. | Knowledgeable of safety regulations and standards relating to department. | 3 | 2 | 1 | N/A |
| 2. | Ensures that employees perform their work according to approved safety regulations and guidelines. | 3 | 2 | 1 | N/A |
| 3. | Reports and/or corrects unsafe conditions or safety violations. | 3 | 2 | 1 | N/A |
| 4. | Completes accident reports in a timely manner. | 3 | 2 | 1 | N/A |

RATING

Total Score _____ ÷ **Number of Descriptions** _____ = **Rating** _____

PROBATIONARY EMPLOYEES ONLY:

Recommended For Regular Status ___ Yes ___ No

DESCRIBE THE GOALS THAT WERE TO BE ACHIEVED DURING THE EVALUATION PERIOD

DESCRIBE HOW THE EMPLOYEE ACHIEVED THE GOALS DESCRIBED FOR THE EVALUATION PERIOD

RECOMMENDATIONS FOR PROFESSIONAL DEVELOPMENT

DESCRIBE THE EMPLOYEE GOALS FOR THE NEXT EVALUATION PERIOD

SUPERVISOR'S COMMENTS (Use additional pages if necessary):

EMPLOYEE'S COMMENTS (Use additional pages if necessary):

COMPLETED/APPROVED BY:

Signature of Supervisor

Date

APPROVED BY (If applicable)

Signature and Title

Date

REVIEWED BY:

Signature of Employee

Date