

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

**PERFORMANCE AND DEVELOPMENT PLAN  
FOR EXEMPT MANAGERIAL AND SUPERVISORY STAFF EMPLOYEES**

Name of Employee \_\_\_\_\_

Job Title \_\_\_\_\_

Department \_\_\_\_\_

\_\_\_\_ Probationary Evaluation      Evaluation Period From \_\_\_\_\_ To \_\_\_\_\_

\_\_\_\_ Annual Evaluation      Evaluation Period From \_\_\_\_\_ To \_\_\_\_\_

**RATING SCALE DEFINITIONS**

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- 3. **Outstanding Performer:** Performs responsibilities in a highly effective manner.
- 2. **Effective Performer:** Performs duties and responsibilities according to established standards.
- 1. **Ineffective Performer:** Has difficulty in meeting goals and achieving outcomes.

N/A    Category description does not apply to the employee.

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**CORE PROFICIENCIES**

**ADMINISTRATIVE MANAGEMENT**

- |    |   |   |   |   |     |
|----|---|---|---|---|-----|
| 1. | Understands and develops long range and short range goals that are consistent with the department's and university's mission. | 3 | 2 | 1 | N/A |
| 2. | Manages department or functions in a highly competent manner.   | 3 | 2 | 1 | N/A |
| 3. | Initiates appropriate actions to overcome challenges or problems which hinder the achievement of goals.                       | 3 | 2 | 1 | N/A |
| 4. | Exercises good judgment in making decisions.  | 3 | 2 | 1 | N/A |
| 5. | Understands and correctly interprets laws and regulations relating to area of responsibilities.                               | 3 | 2 | 1 | N/A |
| 6. | Complies with university policies and procedures  | 3 | 2 | 1 | N/A |
| 7. | Completes planning documents and assessment reports in a timely manner.   | 3 | 2 | 1 | N/A |

### **SUPERVISORY MANAGEMENT**

- |     |   |   |   |   |     |
|-----|---|---|---|---|-----|
| 1.  | Selects quality employees and maintains approved staffing levels.   | 3 | 2 | 1 | N/A |
| 2.  | Ensures that all employees have a current job description and employees understand their duties, responsibilities and expectations of their position. | 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.  | Effectively motivates employees in the performance of their duties and responsibilities.  | 3 | 2 | 1 | N/A |
| 5.  | Ensures that employees have appropriate technology, equipment and supplies to complete assignments and tasks.   | 3 | 2 | 1 | N/A |
| 6.  | Initiates and approves personnel actions in a timely manner.  | 3 | 2 | 1 | N/A |
| 7.  | Manages work schedule and assignments of staff.   | 3 | 2 | 1 | N/A |
| 8.  | Approves employee time records according to published schedules.  | 3 | 2 | 1 | N/A |
| 9.  | Completes performance evaluations on subordinates according to approved procedures and timelines.   | 3 | 2 | 1 | N/A |
| 10. | Approves annual wage/salary increases in a timely manner.   | 3 | 2 | 1 | N/A |
| 11. | Ensures that all employees have the skills, training and professional development to carry out their responsibilities.                                | 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 |
| 4. | Adheres to university travel policies and procedures.                 | 3 | 2 | 1 | N/A |

**DEPARTMENT'S/UNIT'S EFFECTIVENESS**

- |    |  |   |   |   |     |
|----|--|---|---|---|-----|
| 1. | Department/unit has clearly defined goals and objectives.  | 3 | 2 | 1 | N/A |
| 2. | Department/unit engages in outcome assessment.   | 3 | 2 | 1 | N/A |
| 3. | Department's/unit's outcomes are well defined, benchmarks are clearly specified, data and information timely, gathered and information timely gathered and analyzed, needed are clearly specified. | 3 | 2 | 1 | N/A |
| 4. | The department/unit is evaluated to be highly effective in carrying Out its defined tasks and responsibilities.  | 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 |
|----|---|---|---|---|-----|

**CUSTOMER SERVICE SKILLS**

- |    |  |   |   |   |     |
|----|--|---|---|---|-----|
| 1. | Responds courteously to all inquires.  | 3 | 2 | 1 | N/A |
| 2. | Responds to electronic, written and verbal contacts accurately and in a timely manner. | 3 | 2 | 1 | N/A |
| 3. | Able to control 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 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 |

**PROFESSIONAL DEVELOPMENT**

- |    |   |   |   |   |     |
|----|---|---|---|---|-----|
| 1. | Maintains membership in professional organizations. | 3 | 2 | 1 | N/A |
| 2. | Attends seminars, conferences or workshops.         | 3 | 2 | 1 | N/A |
| 3. | Keeps current with trends in field.                 | 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 |

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**RATING**

**Total Score \_\_\_\_\_ ÷ Number of Descriptions \_\_\_\_\_ = Rating \_\_\_\_\_**

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**PROBATIONARY EMPLOYEES ONLY:**

Recommended for Regular Status \_\_\_ Yes \_\_\_ No

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**DESCRIBE HOW THE EMPLOYEE ACHIEVED THEIR GOALS FOR THE CURRENT EVALUATION PERIOD (Use additional pages if necessary)**

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**DESCRIBE THE GOALS FOR THE NEXT EVALUATION PERIOD**

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**RECOMMENDATIONS FOR PROFESSIONAL DEVELOPMENT**

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

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

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**EVALUATION COMPLETED BY:**

\_\_\_\_\_  
**Signature of Supervisor**

\_\_\_\_\_  
**Date**

**EVALUATION APPROVED BY (If applicable)**

\_\_\_\_\_  
**Signature and Title**

\_\_\_\_\_  
**Date**

**REVIEWED BY:**

\_\_\_\_\_  
**Signature of Employee**

\_\_\_\_\_  
**Date**

**Revised April , 2009**