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 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

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

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RECOMMENDATIONS FOR PROFESSIONAL DEVELOPMENT

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DESCRIBE THE EMPLOYEE GOALS FOR THE NEXT EVALUATION PERIOD

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

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