



UNIVERSITY of
LOUISIANA
LAFAYETTE

2017 Annual Evaluation Form - Senior Administrators

Review Period 1/1/2017 - 12/31/2017



REVIEWER

John Blohm (Manager), Ernest Savoie (Indirect Manager)



Lisa Capone

999787|Executive Director
Position

Overview

Task Instructions

Your annual performance evaluation is an important tool to support your professional development as an employee of the University of Louisiana at Lafayette. This provides an opportunity to be recognized for your contributions and to collaborate with your supervisor in aligning your goals and performance with the mission and values of the University.

Executive Goals 2017

Directions

Please provide a rating for each goal.

Rating Scale

Rating	Description
Not Evaluated	
Not Met	No dimensions of the goal (i.e. on time, on budget, etc.) were achieved.
Needs Improvement	Most dimensions of the goal (i.e. on time, on budget, etc.) were not achieved.
Partially Met	One or more dimensions of the goal (i.e. on time, on budget, etc.) were not achieved.
Met	Goal was fully achieved (i.e. on time, on budget).
Exceeded	Goal was achieved ahead of schedule and/or under budget

Describe your accomplishments for Calendar year 2017 and provide an overall rating.

Reviewer	Rating
Lisa Capone (Self)	■
John Blohm (Manager)	■

Comments

Lisa Capone (Self):

Fundraising Goal: \$24,000,000 (Raised \$25,198,938 which represented a 68% increase from the prior year)

Major Gift Proposal Submission Goal: 125 Proposals (Submitted 126, which represented a 400% increase from the prior year)

Face-to-Face Meetings with Donors Goal: 970 (Met 939; which represented a 127% increase from the prior year)

Create a culture of metrics based fundraising and future evaluation process (complete)

Develop model based on national best practices and peer group comparisons for new Corporate & Foundation Relations position and Employer Relations position to expand industry relationship in student hiring and giving (a partnership with



Career Services) and receive approval for hires (completed)

Create new counting guidelines and new reporting standards in line with national best practices (complete)

Create new unit-based cost sharing model for non-endowed fee and obtain leadership approvals (complete)

Create new stewardship framework or matrix of donor recognition for donors giving at different levels to the university and execute (complete)

John Blohm (Manager):

Best year ever! Congrats!

Executive Competencies

Directions

Please provide a rating for each of the core competencies.

Click the down arrow and then Details to view the items associated with each competency.

Click the conversation icon to view a list of behaviors by rating associated with each competency.

Details and Comment Assistant

Rating Scale

Rating	Description
Not Evaluated	
Does Not Demonstrate	Does not demonstrate this competency at the expected level, even with available assistance or direction from others.
Developing	Newly developing in this area; has a general understanding of key principles but limited or no applied experience with this competency. Is capable of using this competency with coaching and support, in simple situations.
Proficient	Has sufficient understanding and experience to operate at a fully professional level with this broad range of moderately complex situations. Can generalize basic principles to effectively function in both predictable and new situations.

Advanced	Has broad and deep understanding and skills, with substantial expertise and experience in this area. Can apply this competency regularly and independently and display this competency in complex, varied situations. Role model for this competency.
Expert	You are known as an expert in this area. You can provide guidance, troubleshoot and answer questions related to this area of expertise and the field where the skill is used.

Builds Relationships and Fosters Collaboration

Cultivates an active network of relationships inside and outside functional area; fosters collaboration and teamwork by inclusive, supportive, cooperative, and sharing power.

Reviewer	Rating
Lisa Capone (Self)	██████
John Blohm (Manager)	██████

Comments

Lisa Capone (Self):
Built strong relationships with key offices including Career Services, Sponsored Research and Dean's.

Builds Talent

Attracts and retains high caliber people; develops a leadership team with diverse capabilities; accurately assesses the strengths and weaknesses of staff; develops successors.

Reviewer	Rating
Lisa Capone (Self)	██████
John Blohm (Manager)	██████

Comments

Lisa Capone (Self):
Has recruited top talent into new positions
Has ongoing training opportunities for team and individuals (Portfolio Management, Gift-in-kind documentation, cold calls, dean/development officer training, etc.)
Has monthly meetings to review where individual team members stand toward annual goal/metric achievement. Coaches team members when needed.
Consistently ensures compliance to job descriptions and makes updates as needed. Assesses staff strengths and moves to new role to yield higher productivity.
Hosts monthly team meetings, annual planning retreats and team-building exercises.

Communicates Openly and Listens

Presents ideas effectively gauging the needs of the audience; actively listens and incorporates input from others.

Reviewer	Rating
Lisa Capone (Self)	██████
John Blohm (Manager)	██████

Comments

Lisa Capone (Self):

In creating so many new policies, processes and positions in 2017, many different stakeholder groups across campus were brought in and their ideas incorporated into the final plan (Alumni, Advancement Services, Career Services, Research, Deans, Foundation, Board members, Donors, etc.)

Cultivates Diversity, Equity and Inclusion

Intentionally attracts a team with diverse perspectives; Champions the development of equitable and inclusive policies and procedures inside the functional area; Develops and employs equitable practices in the hiring, evaluation, and promotion of talent; Recognizes and promotes the shared responsibility for diversity, equity and inclusion.

Reviewer	Rating
Lisa Capone (Self)	██████
John Blohm (Manager)	██████

Demonstrates Emotional Acuity

Considers and responds appropriately to the needs and feelings of others; understands impact of own behavior; has a realistic understanding of own strengths and development needs; is committed to continuous learning.

Reviewer	Rating
Lisa Capone (Self)	██████
John Blohm (Manager)	██████

Demonstrates Financial Acumen

Understands the meaning and implications of key financial indicators; manages overall financial performance; uses financial analysis to evaluate strategic options and opportunities.

Reviewer	Rating
Lisa Capone (Self)	██████
John Blohm (Manager)	██████

Comments

Lisa Capone (Self):

Effectively plans annual budget and manages budget for all development staff. Prepares budget requests with specific ROI models. Evaluates budget each year for effectiveness and retools programming as needed.

Ensures Alignment

Ensures that University strategies and plans are integrated and aligned for success; supports the President and Board of Regents by providing timely, direct, and critical insights on initiatives, political positioning, and public perception.

Reviewer	Rating
Lisa Capone (Self)	██████
John Blohm (Manager)	██████

Comments

Lisa Capone (Self):
Effectively executes communication to donors when Board of Regents changes policies; ensure fundraising alignment to university priorities and policies; provides reports to leadership.

Ensures Execution

Anticipates change, conveys clear priorities, and aligns efforts across functions; addresses barriers, takes action, and holds self and others accountable for results.

Reviewer	Rating
Lisa Capone (Self)	██████
John Blohm (Manager)	████

Comments

Lisa Capone (Self):
Actively manages staff and self towards specified outcomes. Works with staff and leadership to address barriers and holds all accountable through monthly and annual evaluation processes.

Establishes Trust

Respects all individuals and treats them fairly; honors commitments to others; models high ethical standards and integrity.

Reviewer	Rating
Lisa Capone (Self)	██████
John Blohm (Manager)	██████

Influences and Inspires

Promotes ideas and proposals persuasively to shape stakeholder opinion; creates a climate that fosters personal investment and nurtures commitment to a common vision and shared values; inspires action without relying solely on authority.

Reviewer	Rating
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Lisa Capone (Self)	██████
John Blohm (Manager)	██████

Leads Change

Uses data-driven decision-making to generate insights, alternatives, and opportunities for success; fosters a continuous improvement environment; makes novel use of existing ideas, approaches, technologies, or products.

Reviewer	Rating
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Lisa Capone (Self)	██████
John Blohm (Manager)	██████

Shapes Strategic Focus

Formulates effective and progressive strategies aligned with University mission and values; determines objectives and priorities and acts as a catalyst for institutional innovation and growth.

Reviewer	Rating
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Lisa Capone (Self)	██████
John Blohm (Manager)	██████

Goal Planning

Directions

Please enter goals for the coming year.

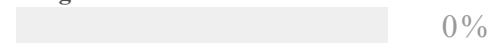
Build Central Development Programming

- Corporate & Foundation Relations
- Regional Development Program
- Leadership Annual Giving Program
- Planned Giving Program
- Annual Giving Program
- Principle Gifts Program

Start Date
7/1/2019

Due Date
6/30/2020

Progress



Weight
0%

Develop New Policies and Procedures

University Policy for Determining Charitable Contribution vs. Sponsored Award. Collaborators include Advancement, Finance, Research, Deans, etc.

New Gift-in-Kind Recording and Vetting Process

Start Date 7/1/2019	Due Date 6/30/2020	Progress <div style="width: 0%; background-color: #ccc; height: 15px;"></div>	0%
Weight 0%			

Expand Propsect Reach

Visit with or contact more prospective donors and donors to encourage more gifts today into the future.

Start Date 7/1/2019	Due Date 6/30/2020	Progress <div style="width: 0%; background-color: #ccc; height: 15px;"></div>	0%
Weight 0%			

Initiate Campaign Training for Deans

Start Date 7/1/2019	Due Date 6/30/2020	Progress <div style="width: 0%; background-color: #ccc; height: 15px;"></div>	0%
Weight 0%			

Raise Private Dollars

Start Date 7/1/2019	Due Date 6/30/2020	Progress <div style="width: 0%; background-color: #ccc; height: 15px;"></div>	0%
Weight 0%			

Development Planning

Become more involved in Foundation Board communication and strategic planning for fundraising

Item	Type	Due Date
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attend committee and board meetings, prepare communications and materials, suggest board action on key items to drive fundraising Action Step 3/13/2019

Further Enhance Campaign Planning Skills to prepare for UL Campaign launch in 2019 or 2020

Item	Type	Due Date
seek peer group samples and online training or conference opportunities	Action Step	3/13/2019

Summary

Overall Rating

2017 Annual Evaluation Form - Senior Administrators
Lisa Capone



Signatures

X Lisa Capone
Employee

1/30/2019
Date

X

Second Level Evaluator

Date

X John Blohm
Evaluating Supervisor

1/30/2019
Date