



2017 Annual Evaluation Form - Senior Administrators

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



REVIEWER

Jerald LeBlanc (Manager), Ernest Savoie (Indirect Manager)

Debra Calais

999833|Assistant Vice President
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
Debra Calais (Self)	██████
Jerald LeBlanc (Manager)	██████

Comments

Debra Calais (Self):

Internal process improvement - with the ISIS system taken done a new process was developed to handle Lacarte transactions.

Enhance access and reporting - continued assistance with department personnel to access their financial budgets and activity.

Update policies - participation on the Policy Project Working Group



Jerald LeBlanc (Manager):
I agree.

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
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Debra Calais (Self)	██████
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Jerald LeBlanc (Manager)	████
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Comments

Debra Calais (Self):
 Accessible and responsive to university officials and department personnel.

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
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Debra Calais (Self)	██████
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Jerald LeBlanc (Manager)	████
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Comments

Debra Calais (Self):
 Staff is highly competent and dedicated.

Communicates Openly and Listens

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

Reviewer	Rating
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Debra Calais (Self)	██████
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Jerald LeBlanc (Manager)	██████
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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
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Debra Calais (Self)	██████
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Jerald LeBlanc (Manager)	██████
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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
Debra Calais (Self)	██████
Jerald LeBlanc (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
Debra Calais (Self)	██████
Jerald LeBlanc (Manager)	████

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
Debra Calais (Self)	██████
Jerald LeBlanc (Manager)	████

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
Debra Calais (Self)	██████
Jerald LeBlanc (Manager)	████

Establishes Trust

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

Reviewer	Rating
Debra Calais (Self)	██████
Jerald LeBlanc (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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Debra Calais (Self)	██████
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Jerald LeBlanc (Manager)	██████
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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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Debra Calais (Self)	██████
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Jerald LeBlanc (Manager)	████
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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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Debra Calais (Self)	██████
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Jerald LeBlanc (Manager)	████
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Goal Planning

Directions

Please enter goals for the coming year.

Enhance access and reporting

Act on finance access requests quickly.

Provide instruction and assistance to departmental personnel in accessing their data.

Implement the new My Finance in Banner self-service .

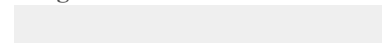
Start Date

1/1/2018

Due Date

12/31/2018

Progress



0%

Weight

25%

Internal process improvement

Concentration in 2018 will be on the procurement card process. For the current manual process, the goal is to increase the



timeliness of the posting of transactions to Banner; however, the ultimate goal in an online solution through the implementation of Chrome River.

Start Date 1/1/2018	Due Date 12/31/2018	Progress <div style="width: 0%; background-color: #ccc; height: 15px;"></div>	0%
Weight 25%			

Operating Budget Development

Utilize the Banner Budget Self-Service to develop the Operating Budget and eventually all budgets.

Start Date 1/1/2018	Due Date 12/31/2018	Progress <div style="width: 0%; background-color: #ccc; height: 15px;"></div>	0%
Weight 50%			

Development Planning

Attend Banner Self-Service Budget Training

Item	Type	Due Date
Attend Banner Self-Service Budget Training	Action Step	12/31/2018

Summary

Overall Rating

2017 Annual Evaluation Form - Senior Administrators
Debra Calais



Signatures

X Debra Calais
Employee

1/30/2019
Date

X

X Jerald LeBlanc
Evaluating Supervisor

1/30/2019
Date



Second Level Evaluator

Date
