



## 2017 Annual Evaluation Form - Senior Administrators

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



### REVIEWER

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



**Lisa Landry**

999371|Director, Administrative Srves  
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 Landry (Self)	██████
Jerald LeBlanc (Manager)	██████

### Comments

**Lisa Landry (Self):**

Goal 1 - Restructure departments to enhance each departments efficiency after the implementation of the new ERP system. With the new ERP system it is my goal to train existing employees and hire top qualified applicants who can easily adapt to change, help to enhance the systems in place and seek ways to improve processes.

Accomplishment - With the implementation of the Banner ERP system many job duties were shifted and / or dissolved due to moving from a very manual system to a robust automated system. The data entry department was dissolved and two of those positions were reallocated to other departments. Accounts payable department took on additional responsibilities therefore a need to create and hire an accounts payable supervisor was warranted. This position has been filled. I have also replaced two persons within the accounts payable department. When filling these two positions we hired more



qualified persons - one with 30 years accounting experience and the other is currently enrolled in accounting working towards her Bachelor of Science. Student accounts receivable was a department with only one employee. With the increase in student receivables we have hired an additional person to assist in the collection process and develop tools to enhance the collection process. This person has a Bachelor of Science with a major in Accounting, a Masters in Business Administration and is currently pursuing a Masters in Information Systems. I plan to restructure the Bursars office in 2018 and start discussions with the Payroll department.

Goal 2 - Increase knowledge concerning changes to IRS 1098T forms that will take place in 2018.

Accomplishment - I attended NACUBO webinars to learn how the change would impact colleges and universities. I read publications issued by the IRS concerning changes to the 1098T form. Throughout the year I followed various list serves concerning these changes. Also kept in communication with Banner -ERP system on how these changes would be implemented and when.

Goal 3 - Assist staff with transition from Banner 8 to Banner 9.

Accomplishment - Staff attended Banner 9 training when available. When training was not available I researched problems or created action line tickets with Ellucian - Banner to resolve any issues. We were able to transition 80% as not all of Banner 9 was problem free. Will continue with the transition process as issues are resolved and patches are installed in Banner 9

**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
<b>Lisa Landry</b> (Self)	████
<b>Jerald LeBlanc</b> (Manager)	████

### **Comments**

**Lisa Landry** (Self):

As the Director of Administrative Services I am called on by many areas of the University to assist in various matters concerning the University. I attended weekly meetings with Purchasing, Finance, SPFAC and Accounts Payable team to discuss issues with the new Banner system. We worked together concerning changes in our daily processes and came to a mutual decision as to which department would be responsible for implementing the change.

I attended weekly meeting with the student team, which consisted of Registrar, Financial Aid, Bursar and Admissions, to discuss issues, concerns and changes within each area. If a problem arose in one of the areas we worked as a team to solve the issue.

I participated in weekly call in meetings with Distance Learning and Academic Partners to discuss issues and improvements with RN\_BSN program. We also set up a new online program for MBA and HCA students.

I worked with Study Abroad to implement new fee schedules for the summer term and process wire transfers abroad.

Worked with Information Technologies on the ongoing implementation of various new software products.

### **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 Landry (Self)	██████
Jerald LeBlanc (Manager)	██████

**Comments**

**Lisa Landry (Self):**

I have set a personal goal to hire the most qualified individuals who will add value to our team. As part of the hiring process I have developed an accounting and excel test which is administered to every applicant. These test allow me assess each applicant's knowledge in accounting and ensure only the most qualified persons are hired.

In 2017 I added one employee to the Accounts Receivable team. This employee has her Bachelor of Science in Business Administration and her Masters in Business. She is working on attaining her CPA and her Masters of Science in Informatics.

I promoted a staff member with 15 years experience to accounts payable supervisor. As soon as this person was promoted I had her attend a seminar entitled "Making the Transition from Staff to Supervisor".

I replaced one accounts payable position with someone who is currently working on her Bachelor of Science in Business Administration and another person who had 30 years experience in the accounting field.

**Communicates Openly and Listens**

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

Reviewer	Rating
Lisa Landry (Self)	██████
Jerald LeBlanc (Manager)	██████

**Comments**

**Lisa Landry (Self):**

I have an open door policy with all employees. Employees have requested meetings with me to discuss areas of concern within their perspective department. We have worked together on ways to address all issue and scheduled followup meetings to chart progress. When the circumstance dictated, additional employees were brought in to help with resolution.

We regularly have impromptu "hall" meetings to discuss issues and how to resolve them.

**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 Landry (Self)	██████
Jerald LeBlanc (Manager)	██████

### Comments

**Lisa Landry (Self):**

Administrative Services has a diverse population of employees that range in gender, ethnicity and age. All persons are treated with respect and recognized for their individuality.

### 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 Landry (Self)	██████
Jerald LeBlanc (Manager)	██████

### Comments

**Lisa Landry (Self):**

Administrative Services deals with persons from every facet of the University... Payroll provides assistance to faculty and staff; Bursar's office provides assistance to students and parents; Accounts Payable provides assistance to vendors, faculty and staff; and Accounts Receivable provides assistance to students, parents and the Attorney General. I strive to treat all persons with respect, dignity and patience. I will consult with others on situations that I am not an expert so that our constituents have correct information. I continue to educate myself by taking continuous education courses, subscribing to various list serves, reading IRS publications and researching various laws and regulations.

### 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 Landry (Self)	██████
Jerald LeBlanc (Manager)	██████

### Comments

**Lisa Landry (Self):**

I stay abreast of current legislation that effects the state budget and its financial impact on the University. I ensure the departments within Administrative Services utilize their budget wisely. I have a strategic plan for the replacement of assets. Request for educational credit is reviewed to determine its value to the department before it is approved. Travel has been limited to local areas for educational purposes.

### 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 Landry (Self)	██████
Jerald LeBlanc (Manager)	██████

**Comments**

**Lisa Landry (Self):**

All request by the President, Vice Presidents, Deans and/or System Office are addressed immediately. Internal reports are run daily to monitor outstanding student debt. When debt is higher than expected, I communicate with various offices within the University to determine if it is a timing issue or is there a real concern. If there is a real concern this information is communicated with the Vice President of Finance.

**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 Landry (Self)	██████
Jerald LeBlanc (Manager)	██████

**Comments**

**Lisa Landry (Self):**

With the implementation of the new Banner ERP system, Administrative Services was faced with major changes. I worked very hard to realign departments to implement the change. I cross trained with staff to ensure all job functions were covered in case of emergencies. All deadlines for implementation were meet. I have plans to continue with cross training within departments.

**Establishes Trust**

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

Reviewer	Rating
Lisa Landry (Self)	██████
Jerald LeBlanc (Manager)	██████

**Comments**

**Lisa Landry (Self):**

I have an open door policy with everyone in the University, from employees to students to vendors. I am willing to listen to any complaint and/or constructive criticism and work together to obtain a solution. I meet with departments to discuss changes and welcome input on implementation of change. I am in daily communications with all areas of Administrative Services to discuss progress and or concerns.



I take ethics training yearly through the State of Louisiana and also with the Louisiana Society of Certified Public Accountants.

### 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
Lisa Landry (Self)	██████
Jerald LeBlanc (Manager)	██████

#### Comments

**Lisa Landry (Self):**

I am committed to providing the necessary services that support the University in reaching its academic mission. With the implementation of the new ERP system many job processes changed and job duties were realigned. When staff expressed concern in certain areas I research the topic and allowed all staff to review the research. This allowed them to have input to the final decision and have ownership in the final process that was adopted. When employees bring ideas for change to me I listen, we discuss the impact on the University and ensure the change is in compliance with all regulations and policies.

### 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
Lisa Landry (Self)	██████
Jerald LeBlanc (Manager)	██████

#### Comments

**Lisa Landry (Self):**

I encourage all employees to continue their growth by taking educational classes that will foster improvement within their departments. With the implementation of the new Banner system employees morale was sometimes down due to long hours, change and stressful days. I continuously met with them to discuss how the changes would impact their job. We had meals brought in so that deadlines could be met. Reports were created for Accounts Payable to determine employee's workload. Task were reassigned so that the workload was distributed evenly. Reports were created in Bursar's office to determine high volume collection days. This data is used to ensure we are properly staffed during this time period and students do not have to wait long in lines.

### 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
Lisa Landry (Self)	██████
Jerald LeBlanc (Manager)	██████

### Comments

**Lisa Landry (Self):**  
 Administrative Services provides support services to all areas of the University so that as a whole we can achieve the University's mission to develop leaders and innovators who advance knowledge, cultivate aesthetic sensibility, and improve the human condition. Each area of Administrative Services is encourage to provide the best customer service possible so that faculty can concentrate on their job of educating our students; students are given payment options to satisfy their debt to the University and are encouraged to seek financial assistance from the Scholarship Office and Financial Aid office and vendors are compensated in a timely manner. I look for ways to improve our processes and will not implement a change until it can be executed with the least disturbance to our constituents.

## Goal Planning

### Directions

Please enter goals for the coming year.

### 2018 Goals

In 2018 I plan on restructuring the Bursar's office to ensure it operates more efficiently and aligns with the University's mission.

Continue to educate myself concerning IRS changes to 1098T reporting and implement the changes before December 31, 2018.

Continue to assist staff with transition from Banner 8 to Banner 9.

Obtain knowledge concerning the 2018 Tax Cuts and Job Reform Act and implement changes.

Start Date	Due Date	Progress
1/1/2018	12/31/2018	<div style="width: 0%;"></div> 0%
<b>Weight</b>		
0%		

## Development Planning

### 2018



Item	Type	Due Date
Continuing Professional Education	Action Step	12/31/2018

### Federal and State Tax Issues

Item	Type	Due Date
Federal and State Tax Issues	Action Step	12/31/2018

## Summary

### Overall Rating

2017 Annual Evaluation Form - Senior Administrators  
Lisa Landry



## Signatures

X Lisa Landry  
Employee

1/31/2019  
Date

X

\_\_\_\_\_  
Second Level Evaluator

\_\_\_\_\_  
Date

X Jerald LeBlanc  
Evaluating Supervisor

1/30/2019  
Date