# 2017 Annual Evaluation Form - Senior Administrators

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

**REVIEWER**

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

# Lauren Shiver

998227|Associate Vice President, Advc
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 |
|---|---|
| **Lauren Shiver** (Self) | ███████████ |
| **John Blohm** (Manager) | ███████████ |

| Comments |
|---|

**Lauren Shiver** (Self):
New position, hired March 2018.

**John Blohm** (Manager):
not employed in 2017

## 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 |
|---|---|
| **Lauren Shiver** (Self) | ██████████ |
| **John Blohm** (Manager) | ██████████ |

## 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 |
|---|---|
| **Lauren Shiver** (Self) | ██████████ |
| **John Blohm** (Manager) | ██████████ |

## Communicates Openly and Listens

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

| Reviewer | Rating |
|---|---|
| **Lauren Shiver** (Self) | ██████████ |
| **John Blohm** (Manager) | ██████████ |

## 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 |
|---|---|
| **Lauren Shiver** (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 |
|---|---|
| **Lauren Shiver** (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 |
|---|---|
| **Lauren Shiver** (Self) | ██████████ |
| **John Blohm** (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 |
|---|---|
| **Lauren Shiver** (Self) | ██████████ |
| **John Blohm** (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 |
|---|---|
| **Lauren Shiver** (Self) | ██████████ |
| **John Blohm** (Manager) | ██████████ |

## Establishes Trust

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

| Reviewer | Rating |
|---|---|
| **Lauren Shiver** (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 |
|---|---|
| **Lauren Shiver** (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 |
|---|---|
| **Lauren Shiver** (Self) | ██████████ |
| **John Blohm** (Manager) | ██████████ |

## Shapes Stategic 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 |
|---|---|
| **Lauren Shiver** (Self) | ██████████ |
| **John Blohm** (Manager) | ██████████ |

# Goal Planning

## Directions

Please enter goals for the coming year.

## Campaign preparation and reporting

Prepare systems for capital campaign estimated to begin in 2020. Provide database analysis, wealth screening, portfolio balancing, and reporting to support engagement and fundraising efforts.

| **Start Date** | **Due Date** | **Progress** | |
|---|---|---|---|
| 7/1/2018 | 6/30/2019 | | 0% |

**Weight**
40%

## Consolidate gift processing

Transition all gift processing and operations staff into one a single location (Foundation Annex). Consolidate all gift processing operations into Banner as the database of record. Discontinue ULL Foundation use of Raiser's Edge.

| **Start Date** | **Due Date** | **Progress** | |
|---|---|---|---|
| 7/1/2018 | 6/30/2019 | | 0% |

**Weight**
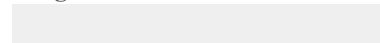30%

## CRM Advance implementation

Prepare staff and Advancement portion of Banner database for upgrade to Ellucian CRM Advance product. Work with central

technology staff to finalize contract and scope of work.

| **Start Date** | **Due Date** | **Progress** | |
|---|---|---|---|
| 7/1/2018 | 6/30/2019 | | 0% |

**Weight**
20%

## Policy and business process review

Review business processes associated with foundation and university advancement operations. Develop a plan to document processes, and prepare for conversion to CRM Advance. Review policies associated with operations areas and begin work to update and create policies as needed to prepare for the campaign.
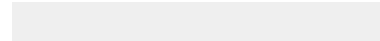
| **Start Date** | **Due Date** | **Progress** | |
|---|---|---|---|
| 7/1/2018 | 6/30/2019 | | 0% |

**Weight**
5%

## Staff consolidation and skill assessment

Be a leader in the planning and implementation of merging foundation and university advancement staff. Assess the job descriptions, skill sets, and capacities of staff assigned to the operations area. Reassign staff as needed, and work to make staff as efficient and productive as possible.
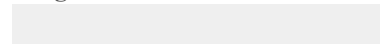
| **Start Date** | **Due Date** | **Progress** | |
|---|---|---|---|
| 7/1/2018 | 6/30/2019 | | 0% |

**Weight**
5%

## Development Planning

## Summary

### Overall Rating

**2017 Annual Evaluation Form - Senior Administrators**
Lauren Shiver

## Signatures

X Lauren Shiver
Employee

1/31/2019
Date

X

_____

Second Level Evaluator

_____

Date

X John Blohm
Evaluating Supervisor

1/30/2019
Date