

Active Model # _____

Rating Cycle Ending _____

**Performance Assessment Review
Performance Factor Checklist Model
Montclair State University –
Supervisors Form for Classified Staff**

Employee Name:	Title:	Rating Period:
SSN:	Dept/Agency - Location:	

Page 1A - Job Expectations *Complete this Form for Civil Service Supervisors ONLY*

Major Job Responsibilities and Essential Criteria for Successful Accomplishment
(Use Additional Sheets as Necessary)

Job Responsibility:

Essential Criteria:

Job Responsibility:

Essential Criteria:

Job Responsibility:

Essential Criteria:

Job Responsibility:

Essential Criteria:

Job Responsibility:

Essential Criteria:

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SECTION 2 - Job Expectations and Evaluation

INTERIM EVALUATION				
Performance Factors	Essential Criteria Statement of conditions that exist when a job has been completed at the commendable level	(1) Failed to Achieve Essential Criteria	(2) Achieved Essential Criteria	(3) Significantly Exceeded Essential Criteria
Job Achievement Factors Factors that are directly related to the outputs of the job.				
1. Goal Achievement Overall extent to which employee accomplished established goals.	Achieved or exceeded major goals			
2. Quality of Work Overall extent to which employee thoroughly and accurately meets the quality criteria.	Achieved or occasionally exceeded all essential quality criteria.			
3. Quantity of Work Overall extent to which employee produces an acceptable amount of work as defined in the quantity criteria.	Produced acceptable or greater amount of work and met or occasionally exceeded essential quantity criteria.			
4. Timeliness Overall extent to which employee meets specified schedules and deadlines.	Met and occasionally completed assignments ahead of specified deadlines.			
Job Related Factors Behaviors that support the overall performance of the job.				
5. Creative Thinking Uses imagination to combine ideas or information in new ways	Occasionally generated new ideas that had a positive impact or demonstrated learning from the experience.			
6. Customer Service Identifies and meets customer (internal & external) needs.	Accurately assessed customer needs; provided necessary or requested service within acceptable timeframes requiring few corrections or revisions; sought customer feedback and expression of satisfaction with work product. Occasionally sought alternative solutions.			
7. Communication Effective expression of ideas, concepts or directions in individual or group situations, using supportive gestures, voice level and organization of materials. If communication is written, thoughts are expressed with appropriate grammar, organization and structure.	Successfully communicated ideas, thoughts or directions. Asked appropriate questions and involved the listener. Sought clarification and affirmed understanding in verbal exchanges. Used appropriate supportive gestures, voice level and organization of materials. Formal presentations were organized and had appropriate detail. Written communication was concise and appropriate for target audience. Key points were understood by intended audience. Affirmed understanding with appropriate questions.			

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<p>8. External Awareness Monitors trends and developments in the external business/operational environment and prepares formal and informal projections on a timely basis for incorporation into tactical and strategic plans. Takes into account external changes, such as changing market/ customer / social/political/operational conditions and forecasts and plans for their impact on mission attainment.</p>	<p>Regularly took steps to gather information and monitor changes and developments in the external environment. Anticipated changing conditions and took action to address them before a problem occurred. Regularly demonstrated a professional approach to data collection/analysis, using it to enhance mission/goal/objectives attainment whenever possible. Occasionally monitored trends and developments in the business/operational environment exercising professional care/diligence in data collection-analysis / reporting. Accurately forecasted and identified changing conditions and situations and reported same on timely basis for incorporation into tactical and strategic plans.</p>			
<p>9. Flexibility Adapts behavior and work methods in response to changing conditions, new information, emergency situations and/or shifting priorities.</p>	<p>Demonstrated a capability to modify behavior in response to change. Generally adapted to changing conditions and emergency situations. Effectively performed work under varying conditions. Adjusted work behaviors and methods to accommodate for multiple demands, shifting priorities, ambiguity and rapid change in work situations.</p>			
<p>10. Internal Controls Assures controls are developed and maintained to protect the integrity of the organization’s resources and assets from fraud, waste, abuse and mismanagement, including the development of appropriate policies and procedures. From a financial/accounting/auditing/ management perspective, provides “reasonable assurance” that an organization’s objectives will be achieved.</p>	<p>Regularly followed proper internal control procedures regarding the assessment, control and reduction of risk regarding waste, fraud, abuse and mismanagement. Exercised care/diligence in the exercise of internal controls ensuring records, reports and related documents were completed and that the organization followed appropriate practices/policies/procedures to help attain organizational results.</p>			
<p>11. Interpersonal Skills Uses interpersonal skills to take charge, direct, motivate or coordinate activities to achieve results and follow-up.</p>	<p>Succeeded in gaining respect. Generated a positive working environment that produced expected results. Involved and motivated others to achieve desired results.</p>			
<p>12. Job Knowledge/Skills Extent to which employee knows the details of the job. Understands job and applies necessary technical knowledge and skill</p>	<p>Effectively demonstrated job knowledge and ability to answer queries. Knowledge and skills contributed to the work of the unit.</p>			
<p>13. Leadership Influencing individual and/or groups toward desired behaviors and results by accepting suitable leadership styles, using interpersonal skills and influencing organizational values and systems.</p>	<p>Demonstrated willingness to assume leadership roles. Influenced others towards desired behaviors or results. Style was usually commensurate with person/situation to achieve desired results or behaviors. Used interpersonal skills to influence individuals and/or group values. Ensured completed work complied with organizational standards and values.</p>			

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SECTION 2: INTERIM EVALUATION				
Performance Factors	Essential Criteria Statement of conditions that exist when a job has been completed at the commendable level	(1) Failed to Achieve Essential Criteria	(2) Achieved Essential Criteria	(3) Significantly Exceeded Essential Criteria
Job Related Factors (Continued) Behaviors that support the overall performance of the job.				
14. Negotiation Explores alternative positions to reach outcomes that gain support and acceptance; communicates in a manner that gains agreement and ownership.	Built consensus in order to meet desired outcomes. Explored positions to reach outcomes that would gain support and acceptance. Gained agreement or acceptance of plans or proposals from others. Developed strategies for giving on some points and standing firm on others in order to achieve desired outcome. Conferred with counterparts to negotiate solutions to problems.			
15. Change Management Understands how social/cultural, political, technological and organizational forces/systems work, and operates effectively to insure that changing conditions impact employees, operations and mission attainment in accord with procedures, rules and regulations of the work/organization.	Regularly took specific steps to be aware of and monitor changes and developments in the internal organizational environment. Anticipated potentially adverse changes and took action to address them before a problem occurs. Was sensitive and/or responsive to conditions in the internal operating environment that impact employees, operations and mission attainment. Monitored conditions within the internal operating environment and their impact on employees, operations and mission attainment. Understood the importance of a stable internal environment and dealt with competing social, technical, organizational and political demands			
16. Team Building Creation of unity of purpose through development of a shared vision and shared objectives; and through appropriate delegation and shared accountability for results.	Objectives were achieved through the establishment of a team vision and effort. Team efforts were encouraged and pro-active steps taken to give members of the team appropriate authority levels and latitude of action. Documented success was due to a team working together from a shared vision, individual but shared objectives, and appropriate delegation with suitable controls established by the manager.			
17. Valuing Diversity Extent to which employee contributes to a productive and harmonious working environment by acting in a respectful manner towards people in the workplace.	Recognizes ethnic, cultural, religious, physical, gender and other individual differences, and makes appropriate accommodation in order to complete an assignment. Respectful treatment of fellow workers, keeping an open line of communication. Willingness to cooperate with others who hold different views in order to complete the task/job at hand. Employee understands his/her part in shaping the environment.			
Total Checks	(Record the Total Number of Checks in Each Column)	____ ✓	____ ✓	____ ✓
Check Value Total	(Multiply Total of Checks by Designated Number in Column)	X 1	X 2	X 3
Points Accumulated	(Record Results of Column Multiplication)			
Total Points Accumulated	(Total All Points Across All Columns)			

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SECTION 2 - Computation and Conversion to Interim Rating

Interim Rating		
<i>1- Unsatisfactory (17-25 Points)</i>	<i>2 - Commendable (26-42 Points)</i>	<i>3 - Exceptional (43-51 Points)</i>

Interim Rating

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SECTION 2 - Justification Sheet and Development Plan - Interim

Justification for Interim Evaluation



Interim Development Plan	
Specific Area(s) Identified for Development	Specific Action to be Taken by Ratee
805	

<p>I have reviewed Sections 1, 2, 3 and 5 of this package and have had a face-to-face meeting with my supervisor to discuss the Interim Rating, Justification and Development Plan. This meeting was held on _____ <i>(Date)</i>.</p> <p>My signature indicates that I have been advised of these PAR elements.</p> <p>Ratee _____</p> <p>Date _____</p> <p>I _____ Agree _____ Disagree with the Interim Rating. I _____ Agree _____ Disagree with the Justification. I _____ Agree _____ Disagree with the Development Plan.</p>	<p align="center">Ratee Comments</p> <p align="center"><i>(Use Additional Sheets as Necessary)</i></p>
<p>My signature indicates that the Ratee's positions have been noted.</p> <p>Rater _____</p> <p>Print Rater Name _____</p> <p>Date _____</p>	<p>My signature indicates that the Ratee's positions have been noted.</p> <p>Reviewer _____</p> <p>Date _____</p>

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SECTION 3 - Job Expectations and Evaluation

FINAL EVALUATION				
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Total Checks	(Record the Total Number of Checks in Each Column)	___ 4	___ 4	___ 4
Check Value Total	(Multiply Total of Checks by Designated Number in Column)	X 1	X 2	X 3
Points Accumulated	(Record Results of Column Multiplication)			
Total Points Accumulated	(Total All Points Across All Columns)			

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SECTION 3 - Computation and Conversion to Final Rating

Final Rating		
<i>1- Unsatisfactory</i> (17-25 Points)	<i>2 - Commendable</i> (26-42 Points)	<i>3 - Exceptional</i> (43-51 Points)

Final Rating

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SECTION 3 - Justification Sheet and Development Plan - Final

Justification for Final Evaluation

Final Development Plan	
Specific Area(s) Identified for Development	Specific Action to be Taken by Ratee

<p>I have reviewed Sections 1, 2, 4 and 5 of this package and have had a face-to-face meeting with my supervisor to discuss the Final Rating, Justification and Development Plan. This meeting was held on _____ (Date).</p> <p>My signature indicates that I have been advised of these PAR elements.</p> <p>Ratee _____</p> <p>Date _____</p> <p>I _____ Agree _____ Disagree with the Final Rating. I _____ Agree _____ Disagree with the Justification. I _____ Agree _____ Disagree with the Development Plan.</p>	<p>Ratee Comments</p> <p align="center"><i>(Use Additional Sheets as Necessary)</i></p>
<p>My signature indicates that the Ratee's positions have been noted.</p> <p>Rater _____</p> <p>Print Name of Rater _____</p> <p>Date _____</p>	<p>My signature indicates that the Ratee's positions have been noted.</p> <p>Reviewer _____</p> <p>Date _____</p>

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SECTION 3 - Fact Sheet of Significant Performance Events

Description of Significant Performance Event	Rater Comments/Recommended Action
	<hr style="border: 0; border-top: 1px solid black; margin-bottom: 5px;"/> <div style="display: flex; justify-content: space-between; font-size: small;"> Ratee Initials Rater Initials Date </div>
Description of Significant Performance Event	Rater Comments/Recommended Action
	<hr style="border: 0; border-top: 1px solid black; margin-bottom: 5px;"/> <div style="display: flex; justify-content: space-between; font-size: small;"> Ratee Initials Rater Initials Date </div>
Description of Significant Performance Event	Rater Comments/Recommended Action
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Description of Significant Performance Event	Rater Comments/Recommended Action
	<hr style="border: 0; border-top: 1px solid black; margin-bottom: 5px;"/> <div style="display: flex; justify-content: space-between; font-size: small;"> Ratee Initials Rater Initials Date </div>

Ratee Comments: *(Use Additional Sheets as Necessary)*