PLANNING BUDGET ADVISORY COUNCIL (PBAC) ADMINISTRATIVE AND SUPPORT SERVICES EFFECTIVENESS REVIEW (ASER) EVALUATION FORM

Name of unit being reviewed: _____

Name of PBAC member(s) conducting review: _____

Date of review _____

INSTRUCTIONS

- Read the unit report independently and record evidence—not impressions—against each rubric dimension.
- Complete the report-quality gate.
- Meet as a review team to reconcile ratings and identify overall evidence confidence. Note significant evidence limitations within each dimension's evidence record.
- Draft one team report with commendations, findings, prioritized improvements, ratings, resource direction, and follow-up.
- Present the complete record to PBAC for calibration and final approval.
- Base the review on information requested in this year's questionnaire. Request clarification of submitted responses when necessary. Do not lower a rating solely because a unit did not provide information the questionnaire did not explicitly request.
- Note: a copy of this report will be provided to the unit.

REPORT QUALITY GATE

Assess whether the report provides sufficient information to address each criterion. Select Yes, Partially, No, or N/A. For any criterion marked Partially or No, use Reviewer Notes to identify the missing information or clarification needed.

Check	Assessment	Reviewer note
Unit purpose, scope, users, staffing, and budget are clear.	Choose an item.	

Check	Assessment	Reviewer note
Where applicable, recommendations from a prior monitoring review and actions taken in response are addressed, including equivalent monitoring determinations from prior review cycles.	Choose an item.	
Core narrative questions are answered directly.	Choose an item.	
Meaningful demand, quality, efficiency, and outcome evidence is included.	Choose an item.	
Measures, reporting periods, sources, and context are sufficiently clear to interpret the evidence. Note targets and limitations where provided.	Choose an item.	
The 10% budget scenarios and approximate fiscal impacts are sufficiently clear to understand the proposed changes. Any explicit resource request is distinguishable from the hypothetical scenarios.	Choose an item.	
Protected information is appropriately handled.	Choose an item.	

Rubric and Evidence Record

Rating Scale: Ratings summarize the preponderance of evidence; averages do not replace judgment. Apply the following descriptions to the scored dimensions. Risk, compliance, and resilience is unscored this year.

4—Strong: Evidence demonstrates consistently effective performance and notable strengths.
3—Effective: Evidence demonstrates that the unit fulfills its purpose, with manageable improvement opportunities.
2—Developing: Evidence demonstrates performance gaps requiring improvement.
1—Material concern: Evidence demonstrates significant performance problems affecting service or institutional outcomes.
IE—Insufficient evidence: Available information does not support a sound rating.
N/A—Not applicable: The dimension does not apply; explain why.

Evidence Scale: High = Multiple relevant sources are consistent; measures and context are clear; material limitations are minor. **Moderate** = Evidence is useful but meaningful limitations, short trends, inconsistent definitions, or limited comparison. **Limited** = Important claims rely primarily on assertion, major measures are absent, or unresolved contradictions remain.

Dimension and tests	Rating	Evidence supporting rating	Improvement implication
Mission and strategic contribution Purpose, necessity, alignment, outcomes, appropriate service model	Choose an item.	Choose an item.	
Quality and user experience Definition and measurement of quality; evidence of service effectiveness and user experience where provided.	Choose an item.	Choose an item.	
Demand and service level Definition and measurement of demand; ability to meet demand; constraints and unmet needs identified in the submission.	Choose an item.	Choose an item.	
Efficiency and stewardship Inputs-to-results, process, technology, staffing, funding, collaboration	Choose an item.	Choose an item.	
Continuous improvement Use of data to inform decisions; identified improvement opportunities; collaboration and duplication; response to prior monitoring recommendations where applicable. Consider completed improvements where supplied.	Choose an item.	Choose an item.	

Dimension and tests	Rating	Evidence supporting rating	Improvement implication
Risk, compliance, and resilience Unscored contextual assessment this year. Note material risks, compliance requirements, and service continuity concerns identified in the submission. Identify clarification needed; do not infer that unreported risks or controls are absent.	Unscored	Choose an item.	

Review and Feedback

1. Services Snapshot

In 150 words or fewer, describe what the unit does, whom it serves, why it matters, and the central review conclusion.

2. Commendations

Identify two or three practices or results worth sustaining or sharing. Tie each to evidence.

3. Findings

State the most consequential evidence-based findings. Distinguish observations, impacts, and uncertainties.

4. Prioritized Recommendations

Recommendations should state an outcome, not prescribe a method unless a specific control or requirement is necessary. Limit required recommendations to the few actions most likely to improve value, performance, evidence, or risk management. Distinguish actions needed to improve service performance from actions needed to strengthen measurement or documentation. Identify supporting evidence, the intended outcome, and proposed timing for each recommendation.

Priority	Recommendation	Why it matters/evidence	Suggested measure	Timing
1				
2				
3				

Determination and resource recommendation

A response to the hypothetical 10% budget increase scenario is not automatically a request for additional funding. Distinguish the unit's stated request, if any, from PBAC's recommendation.

Decision element	PBAC selection and rationale
Service determination	☐ Enhance ☐ Continue ☐ Continue with required improvement and monitoring ☐ Restructure, reduce, or discontinue
Resource direction	☐ Increase ☐ Maintain ☐ Reallocate/Redesign ☐ Reduce ☐ No funding change recommended
Evidence confidence	☐ High ☐ Moderate ☐ Limited
Rationale	

Decision element	PBAC selection and rationale
Approximate fiscal impact/range	
Expected institutional benefit	
Material risks, dependencies, or transition needs	

Follow-up Requirements

The unit action response is due within 45 days after the unit receives the final approved recommendations. Specify the due date when the recommendations are transmitted.

Requirement	Owner	Measure/deliverable	Due date	PBAC disposition
Unit action response			45 days (see above)	
Two-year monitoring report (if required)				
Other check-in (if required)				

Executive Council Recommendation

State the decision requested of the Executive Council, including resource direction, implementation owner, timing, and any condition that should accompany action.
