

Checklist for Reviewer (Chair/Relevant Supervisor) Narrative for the Annual Performance and Planning Review

Use the following checklist to compose a brief synopsis of the Annual Performance and Planning Review meeting. Where possible, use a bullet point or numbered list format. This document should be attached to/accompany the faculty member's review (Form 1) and will be known as the "*Narrative Summary and Evaluation*" that is currently referred to on Form 1.

Checklist items:

1. Make a statement assessing the faculty member's performance during the current academic year in each relevant mission:
 - a. Education/Teaching
 - b. Research/Creative & Other Scholarly Activities
 - c. Service/Outreach
 - d. Clinical Care

2. List the next academic year's mutually established goals and expectations (work assignment) in each relevant mission, along with percent effort:
 - a. Education/Teaching
 - b. Research/Creative & Other Scholarly Activities
 - c. Service/Outreach
 - d. Clinical Care

3. Indicate the overall performance rating (Exceeds expectations for rank; Meets expectations for rank; Needs improvement for rank; Unsatisfactory for rank)

4. Provide justification for any performance rating other than "Meets expectations for rank"

5. Make a statement of progress toward tenure consideration, where applicable (faculty member on tenure track)