Checklist for Evaluator’s Narrative Summary 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 uploaded to the faculty member’s review in Digital Measures under the Evaluator step.

Checklist items:

1. Include the evaluator’s name and date of evaluation.

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

3. List the next academic year’s mutually established goals (what the faculty member wants to achieve) and expectations (work assignments) in each relevant mission:
   - Education/Teaching
   - Research/Creative & Other Scholarly Activities
   - Clinical Care
   - Service/Outreach

4. Indicate the overall performance rating (Exceeds expectations for rank; Meets expectations for rank; Needs improvement for rank; Unsatisfactory for rank). Provide justification for any performance rating other than “Meets expectations for rank”

5. Indicate Percent Effort in each relevant mission area. Percent Effort must equal 100%.

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