

## **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:
  - a. Education/Teaching
  - b. Research/Creative & Other Scholarly Activities
  - c. Clinical Care
  - d. 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:
  - a. Education/Teaching
  - b. Research/Creative & Other Scholarly Activities
  - c. Clinical Care
  - d. 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)