

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 academic year being evaluated in each relevant mission area:
 - 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 area:
 - a. Education/Teaching
 - b. Research/Creative & Other Scholarly Activities
 - c. Clinical Care
 - d. Service/Outreach
4. Indicate the **performance rating for each mission area** and 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".

*Note: The overall performance rating is not an average or summation of the ratings for each mission area. It should include performance outside of the mission areas, e.g., professionalism, collegiality, collaboration, etc.
5. Indicate **Percent Effort** in each relevant mission area. Percent Effort must equal 100%.
6. If the faculty member holds a tenure-track appointment, include a **statement of progress** toward tenure consideration.
7. If applicable, include a **statement of progress** towards promotion consideration