

The Annual Review: Planning for Meaningful Performance Conversations

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BEFORE WE BEGIN

- Participants muted to limit background noise.
- Submit questions at any time via the Chat icon. The Chat icon appears when you mouse over the bottom of the screen.
- If the volume seems too low, check your system volume.
- Technical issues? Log out and log back in.
- Session is being recorded. A link to the recording will be emailed soon.

IMPORTANCE OF ANNUAL REVIEWS

- Good personnel practice (and required by University policy)
- Critical tool for professional advancement in an academic career
- Provide occasion for self-evaluation and look to the future
- Acknowledge and recognize good work
- Identify productive new uses of a faculty member's talents; clarify expectations and allocation of effort
- Identify areas for improvement and develop appropriate response
- Drive rewards, promotion, tenure, and salary increase considerations

The annual review is a formative process that:

- assesses faculty performance in the three mission areas (clinical, education, research)
- aids in setting goals for the future.
- is an opportunity to provide guidance, to recognize achievement, and to understand obstacles and challenges.

REQUIRED PROCESS

- Must include face-to-face meeting with a supervisor and the faculty member.
- Is more than numbers – should include a discussion of goals, accomplishments, performance relative to expectations
- Progress towards advancement should be discussed with every faculty member at rank of assistant or associate EVERY year.
- Performance not meeting expectations must be documented and a performance improvement plan (PIP) must be created and agreed upon.
- For faculty who have a PIP, follow up should occur quarterly.

Annual Review forms have been **customized for each track**

All forms are inclusive of:

- considering work in appropriate mission area(s)
- documenting progress toward prior-year goals
- discussion of adherence to ASPIRE values
- discussion of contributions in service.
- additional comments from chair, mentor, and supervisor

ANNUAL REVIEW FORMS

**SCHOOL OF MEDICINE
FACULTY DEVELOPMENT AND PERFORMANCE REVIEW
Clinical Faculty Track
Evaluation Period: 7/01/____ to 06/30/____**

INSTRUCTIONS

This annual faculty review is an opportunity to celebrate successes, identify opportunities for growth, and engage in a dialogue that underlies faculty, division, department and school success.

Faculty Member: Please complete **Part I** of this form and forward it, along with an updated CV, to your supervisor prior to the scheduled performance discussion. Please follow the School of Medicine P&T formatting for your CV. Reference website:

<http://faculty.med.virginia.edu/facultyaffairs/advancement/pandt/pt-resources/>
See "Building a Portfolio" and labeled "CV Format guide."

Evaluator: The supervisor should complete **Part II** of this form, meet with the faculty member, and then prepare a narrative summary of the evaluation and plans for the coming year.

Name:		Rank:	
Department:		Division:	
Track:		Years in Rank:	
Years on Track:			
Admin title(s):			

Evaluation Date:	
Evaluator:	

- Prepare
- Complete annual review form and supporting documentation (good prompt to update CV)
- Ensure reviewer has materials to review in advance in order to prepare personalized feedback
- Set agenda and goals for the meeting
- Prepare questions

BE PREPARED TO DISCUSS

- Your accomplishments (don't wait until annual review to share)
- Your effort allocation
 - Know what it is on paper and evaluate whether that accurately reflects how you are spending your time
 - Ask for an updated job description that accurately reflects effort prn.
- If there is a mismatch between effort and the outcomes associated with that effort, expect a discussion of reallocation of effort.
- If you are interested in a new role, particularly a leadership role, discuss that interest and outline a path to achieve.

EXAMPLE REFLECTION QUESTIONS

- What do you enjoy about your work?
- How would you describe your level of satisfaction?
- What are the good and/or bad things about the job?
- What are your strengths and weaknesses?
- How do you think you did in achieving the goals you had set for yourself last year?
- In what areas did you excel?
- What areas need improvement?
- What are some challenges/obstacles faced in reaching goals?
- What are your goals for the coming year?
- How would you describe your progress in achieving those goals?

- What areas should I focus on in the next year in order to be a stronger candidate for promotion or leadership opportunity?
- Do you have advice about strengthening any part of my portfolio?
- Is my portfolio unbalanced in any way? Am I concentrating too much in one area?
- What advice do you have for me about prioritizing my activities?
- Am I making adequate progress toward developing a national/international reputation? If not, How can I develop my national/international reputation?
- Is there anyone else I should be speaking to?

- Negotiate what is needed to ‘meet’ and ‘exceed’ expectations
- Secure and utilize support and resources as promised
- Set milestones and provide updates on progress
- Engage in follow-up discussions as needed

ANNUAL REVIEW AND ACADEMIC ADVANCEMENT

- Expect to discuss every year if you have not achieved rank of professor; bring into the conversation if your supervisor does not
- Understand criteria for advancement in your faculty track
- Be prepared to discuss your accomplishments towards meeting those criteria
- Be prepared to discuss next steps you will take and needed resources to accomplish those steps
- Be sure to discuss appropriateness of your track
- At any time, discuss time off the clock if appropriate

QUESTIONS AND COMMENTS