**Roseman University College of Medicine**

**Annual Achievement Report for Senior Leadership**

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| **Instructions** |
| This annual achievement report, the annual goals statement document, and the subsequent meeting with your supervisor are intended to gauge your near-term and long-term career objectives within and outside of Roseman University College of Medicine (RUCOM), and to determine how to best achieve them. You may respond to questions with information formatted for your CV; **brief responses or simple lists are preferred.** |
|  |
| **Name:** | *Prepopulated (HR/Ops)* | **Hire Date:** | Prepopulated (HR/Ops) |
| **Admin title(s):** | *Prepopulated (HR/Ops)* |
| **Review Period:** | *Prepopulated (HR/Ops)* |
| **Reviewer:** | *Prepopulated (HR/Ops)* | **Date:** | *Prepopulated (HR/Ops)* |
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| **SECTION I: CITIZENSHIP** |
| Please review the following list of behaviors and skills of a good institutional citizen and reflect on your performance as a citizen of RU and RUCOM when answering the questions following the list.  |
| 1. I can readily articulate RU and RUCOM’s institutional values.
2. I know RU and RUCOM policies and procedures that pertain to my position and regularly refer to them when I have a question about a proposed course of action.
3. I am familiar with the administrative and educational structure of RU and RUCOM, and I reach out to the appropriate people for assistance or collaboration. I follow the hierarchy of decision-making authority.
4. I complete required training and paperwork as requested and am proactive in updating HR and operations when my situation or needs change.
5. I am collegial and actively work to foster a sense of belonging with my colleagues, students, and others I encounter in the course of my work.
6. I am aware of how my attitude and behaviors impact those I work with including colleagues, students, and other stakeholders.
7. I provide organizational feedback and engage in quality improvement efforts.
8. I ask for feedback and input from peers and stakeholders when I am designing or implementing new policies, procedures, or programs.
9. I work across unit/department/office and college lines to foster collaboration and identify unwanted duplication of efforts.
10. I support the university, college, and my colleagues by attending events and activities.
11. I speak up when I notice something wrong or when I have a possible solution to a problem my colleagues are facing, and I share resources and knowledge when appropriate.
12. I engage in ethical self-promotion.
 |
| **Consider two to three citizenship behaviors/skills from the list above, or other relevant behaviors/skills, that exemplify your citizenship. Please provide examples in narrative form or a bullet list.** |
| *List or Description (Reviewee)* |
| **Please choose a citizenship behavior/skill from the list above, or include some other relevant behavior/skill, that you seek to further develop and outline steps you will take over the next year toward that development?** |
| *Description (Reviewee)* |
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| **Institutional Trainings and Activities** |
| **RSPMLM Badge Level** | *N/A* |
| **GENESIS Readiness Activities** |
| *Prepopulated (HR/Ops)* |
|  |  |  |  |
|  | **Date** |  |  |
| **Active Shooter** | *Prepop (HR/Ops)* | X | N/A |  |
| **COI** | *Prepop (HR/Ops)* | X | N/A |  |
| **CPR/Basic Life Support** | *Prepop (HR/Ops)* | X | N/A |  |
| **FERPA** | *Prepop (HR/Ops)* | X | N/A |  |
| **HIPAA** | *Prepop (HR/Ops)* | X | N/A |  |
| **IRB/CITI** | *Prepop (HR/Ops)* | X | N/A |  |
| **Sexual Harassment** | *Prepop (HR/Ops)* | X | N/A |  |
| **SOGI** | *Prepop (HR/Ops)* | X | N/A |  |
| **Other** | *Prepop (Dean’s Off)* | X | N/A |  |
|  |  |  |  |  |
| **Graduation Attendance** | *Prepop (OAA)* | If no, why? *Narrative (Reviewee)* |
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| **Section II: Service**  |
| Briefly elaborate on any service activities you were involved in during the past year. Details of these activities should be included in your CV.  |
| **RUCOM Service:** |
| *List (Reviewee)* |
| **RU Institutional Service** |
| *List (Reviewee)* |
| **Service to Profession (Professional Societies/Organizations)** |
| *List (Reviewee)* |
| **Service to Community (GENESIS, EMPOWERED, ASPIRE, and voluntary service to community organizations)** |
| *List (Reviewee)* |
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| **Section III: Teaching** |  |  | **N/A** |
| Please append any evaluations from students or by your peers (formal and informal) that you have received. |
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| **List or describe contributions you have made in the following four areas: 1) Teaching/Delivery of educational content at RUCOM (e.g., lectures, workshops, courses, practicums, labs, case discussions, small group “active” learning session), 2) Curriculum Development; 3) Learner Assessment (e.g., OSCE Grader, Assessment Design); 4) Advising/Mentoring (List students you formally mentored). Please include this information on your CV.** |
| *List or Description (Reviewee)* |
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| **Section IV: Research & dissemination of scholarship** |  |  | **N/A** |
| **List or briefly describe your area(s) of research and scholarship during the past year.** |
| *List or Description (Reviewee)* |
| **List or briefly describe your plans for the next year in terms of new areas of investigation (if any), grant applications and manuscript submissions.**  |
| *List or Description (Reviewee)* |
| **List or briefly describe collaboration(s) you have participated in during this past year with colleagues across RUCOM and outside of RUCOM.** |
| *List or Description (Reviewee)* |
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| **Section V: LEADERSHIP & Administration** |
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| **General Administrative & Leadership Skills** |
| 1. I delegate responsibility and authority appropriately; I accept responsibility for actions taken.
2. I involve my department, office, or team in decision-making and keep relevant parties informed about all essential matters.
3. I ask clarifying questions and engage in discussion to best understand what is needed from me and my unit, office, or department.
4. I actively work to grasp all aspects of a problem and strive to see it from the points of view of all stakeholders.
5. I do not wait for problems to become emergencies before addressing them; rather, I try to handle problems when they first emerge.
6. I initiate difficult conversations, when appropriate, and follow through with corrective action.
7. I work through problems with colleagues and staff and seek meaningful solutions to interpersonal and interprofessional conflicts.
8. I am open to feedback from peers, supervisees, and other stakeholders and make meaningful changes based on that feedback.
9. I produce requested work by the stated deadline and ensure that information is accurate and thorough.
10. I exercise sound judgment in travel schedule and professional commitments to ensure leadership role is not compromised.
11. I preside over regular meetings with my department, unit, or office. I am an effective meeting chair ensuring that agendas are set, understood, and followed; meetings start and end on time; and meetings are concluded with action plans. I am committed to involving the meeting participants in the planning, preparation, and execution of the meeting.
12. I accept responsibility for the work assigned to me, and I work creatively with the tools and resources available to persevere when challenges emerge.
13. I ensure administrative activities comply with excellent business practices in keeping with stated policies and procedures.
14. I am curious about best practice and the how/why of things (e.g., how internal processes work and why they work that way, how other institutions do things and why, how my staff feels about a proposed course of action and why, etc.).
15. I organize and lead periodic program reviews.
16. I ensure that my department, unit, or office’s physical working environment is well maintained and functional.
17. I supervise and coordinate development efforts.
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| **Consider two to three general administrative and leadership behaviors/skills from the list above, or other relevant behaviors/skills, that you excel at and provide examples in narrative form or a bullet list.** |
| *List or Description (Reviewee)* |
| **Please indicate a general administrative and leadership behavior/skill from the list above, or include some other relevant behavior/skill, that you seek to further develop and outline steps you will take over the next year toward that development?** |
| *Description (Reviewee)* |
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| **Professional & Staff Development & Management** |
| 1. I anticipate HR needs and direct high-quality personnel searches in a timely, cost-effective manner.
2. I formally orient, mentor, and support personnel in career development and promotion.
3. I administer personnel assessments that links merit-pay to performance.
4. I meet annually with personnel in my department, unit, or office on professional growth; I ensure all personnel are adequately trained.
5. I conduct annual performance appraisals of direct reports; I ensure all personnel are reviewed annually in writing.
6. I engage in ethical promotion of my supervisees.
 |
| **Please choose one professional/staff development & management behavior/skill from the list above, or include some other relevant behavior/skill, that you excelled at and provide a description or evidence of your excellence.**  |
| *List or Description (Reviewee)* |
| **Consider two to three professional and staff development and management behaviors/skills from the list above, or other relevant behaviors/skills, that you excel at and provide examples in narrative form or a bullet list.** |
| *Description (Reviewee)* |
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| **Financial Management** |
| 1. I communicate the budget to my department, unit, or office and actively involve them in budget planning and capital equipment investment.
2. This past fiscal year, the budget of my unit, office, or department came in favorable.
3. For this fiscal year to date, the budget of my unit, office, or department is favorable.
4. I am involved in and attend to budget-related administrative detail and financial reporting.
 |
| **Consider two to three general financial management behaviors/skills from the list above, or other relevant behaviors/skills, that you excel at and provide examples in narrative form or a bullet list.** |
| *List or Description (Reviewee)* |
| **Please choose a financial management behavior/skill from the list above, or include some other relevant behavior/skill, that you seek to further develop and outline steps you will take over the next year toward that development.** |
| *Description (Reviewee)* |
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| **Academic Leadership** |
|  ***Educational Administration*** |  | **N/A** |
| 1. I interact effectively with Dean’s Office and faculty in successful implementation of the Strategic Plan for Curriculum.
2. I assure department maintains quality, currency, and accreditation of educational programs.
3. I assure oversight and accessibility of academic leadership to graduate and medical students.
4. I assure that all faculty and staff whom I supervise are up to date with all required trainings and curricular readiness.
5. I encourage and provide leadership to all aspects of department’s educational activities.
6. I oversee/manage the administration of academic course planning/scheduling equitably and collaboratively with faculty.
7. I model, foster, and participate in quality teaching practices.
8. I encourage faculty to contribute to continuing medical education programs.
 |
| **Consider two to three educational administration behaviors/skills from the list above, or other relevant behaviors/skills, that you excel at and provide examples in narrative form or a bullet list.** |
| *List or Description (Reviewee)* |
| **Please choose an educational administration behavior/skill from the list above, or include some other relevant behavior/skill, that you seek to further develop and outline steps you will take over the next year toward that development.** |
| *Description (Reviewee)* |
|  |
|  ***Sponsored Research & Grantsmanship*** |  | **N/A** |
| 1. I encourage and foster clinical, laboratory, population health, and educational research and innovation.
2. The number of research proposals/awards in the department, unit, or office has increased during the past year.
3. I support faculty dedication to research and scholarship through equitable allocation of space and resources.
4. I promote interdisciplinary approaches to research and scholarship in support of all scholarship in the COM strategic plan.
5. I maintain a record of continuing scholarship (e.g., publish articles, papers, chapters; serve as PI).
6. I understand and advance research compliance issues and ensure effective laboratory training.
7. I foster integration of basic science and clinical research efforts.
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| **Consider two to three sponsored research and grantsmanship behaviors/skills from the list above, or other relevant behaviors/skills, that you excel at and provide examples in narrative form or a bullet list.** |
| *List or Description (Reviewee)* |
| **Please choose a sponsored research and grantsmanship behavior/skill from the list above, or include some other relevant behavior/skill, that you seek to further develop and outline steps you will take over the next year toward that development.** |
| *Description (Reviewee)* |
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| **Mission-Based Leadership** |
| 1. I am attentive to the mission and values of RU, RUCOM, and the GENESIS education, healthcare, and population wellness model, and I use them to align the work of my unit, office, or department.
2. I am a trusted ambassador for RU, RUCOM, and GENESIS in the community.
3. I notice lapses of professionalism and when tasks stray from the mission and values of RUCOM.
4. I ethically advocate for the needs of my unit, office, or department and of RU, COM, and the communities we serve.
5. I consider how a proposed course of action impacts the College’s mission, vision, and values as well as the impact it will have my unit, office, or department.
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| **Consider two to three mission-based leadership behaviors/skills from the list above, or other relevant behaviors/skills, that you excel at and provide examples in narrative form or a bullet list.** |
| *List or Description (Reviewee)* |
| **Please choose a mission-based leadership behavior/skill from the list above, or include some other relevant behavior/skill, that you seek to further develop and outline steps you will take over the next year toward that development.** |
| *Description (Reviewee)* |
| **Please describe any programming or interventions you have done within your department, unit, or office on matters of citizenship, professionalism, or collegiality, and discuss whether the programming or intervention was successful.** |
| *Programming/Intervention (Reviewee)* |
| *Description* |
| *Success of Intervention* |
|  |
| **Section VI: Clinical expertise and innovation** |  | **X** | **N/A** |
| **Please indicate: Prepopulated (Ops/RMG)** |
| **Gross revenue billed as of 1/1/\_\_** | *Prepopulated Ops* | **Prior Year** |  |
| **# of clinic visits** | *Prepopulated Ops* | **Prior Year** |  |
| **# of procedures performed** | *Prepopulated Ops* | **Prior Year** |  |
| **Patient Satisfaction Score** | *Prepopulated Ops* | **Prior Year** |  |
| Describe any expansion or enhancement of clinical services for which you are responsible. | *Narrative (Reviewee)* |
| Provide context on clinical productivity as appropriate. | *Narrative (Reviewee)* |
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| **Please describe your participation in clinical trials or any form of clinical innovation(s) during the past year; please ensure that these are detailed on your CV (e.g., *innovative approaches to the treatment, diagnosis, or prevention of disease, development of novel technologies, and/or models of care delivery*).**  |
| *List or Description (Reviewee)* |
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| **Section VII: Accomplishments & Changes to Responsibilities** |
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| **Recognitions, Honors, and Awards** |
| **Award/Honor/Recognition** | **Organization** | **Date** | **Narrative** |
| *List (Reviewee)* |  |  |  |
| **Accomplishments:** List 3-5 in order or priority, ideally derived from last year’s goals, including supporting data |
| **Accomplishment**  | **Supporting Data** |
| *Description (Reviewee)* |  |
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| **Changes to Responsibilities** |
| **Consider your current position description and briefly describe any major changes in your role/work responsibilities over the past year.** |
| *List or Description (Reviewee)* |
| **Are there additional resources or support you need from the Dean’s Office to be successful with this new work responsibility?** |
| *List or Description (Reviewee)* |
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| **Section VIII: Wellness** |
| Reflect on your perceptions of wellness and/or burnout. Is there anything the Dean’s Office, College, or University can do to optimize your well-being at work? |
| *Narrative (Reviewee)* |
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| **Leave Time Away from College** |
|  | **Vacation** | **Other Leave** | **Professional Activities** |
| **Allowed** | *Prepopulated Ops/HR* |  |  |
| **Used** | *Prepopulated Ops/HR* |  |  |
| **Balance** | *Prepopulated Ops/HR* |  |  |
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| **Section IX: OVerall rating** |
| **What other topics would you like to discuss during the review meeting?** |
| *List or Description (Reviewee)* |
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| **Dean’s Overall Performance Review** |
| **Exceeded Expectations** | **Achieved Expectations** | **Unmet Expectations** |
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| **Dean/Reviewer’s commendation(s) for performance in the following area(s):** |
| *Narrative (Dean/Reviewer)* |
|  |
| **Dean/Reviewer’s recommended area(s) for leadership growth and development:**  |
| *Narrative (Dean/Reviewer)* |
|  |
| **Acknowledgement** |
|  |  |  |
| Signature of Senior Leader |  | Date |
|  |  |  |
| Signature of Reviewer |  | Date |
|  |  |  |
| Signature of Dean |  | Date |
|  |  |  |