

Annual Progress Summary

This form is to be completed by the mentor and fellow during the annual review meeting. This form provides summary ratings of the fellow's progress during the past year. It also documents the fellow's future goals and necessary steps to achieve those goals.

This form is part of the renewal package and must be completed before the fellow is renewed.

Research Accomplishments

1. In general, were the research goals from the last evaluation achieved?
2. What are the fellow's research goals for the next year?
3. List steps for improvement, if any, by either the fellow or mentor.

Research Proficiency

1. Using a 5-point scale (1 = *serious concerns* to 5 = *excellent*), provide a summary rating of the fellow in these areas:
 - Productivity _____
 - Creativity _____
 - Initiative _____
 - Reliability _____
 - Team Member _____
 - Overall Performance _____
2. Identify steps necessary to improve any low ratings.

Career Goals

1. In summary, what are the fellow's career goals?
2. What steps are needed to achieve these goals (e.g., more attendance at career-oriented events)?

Your signature below indicates that you agree with the information on this form.

Fellow (print)

Mentor (print)

Fellow's Signature

Date

Mentor's Signature

Date

Annual Progress - Mentor Form

Fellow's name _____

Date _____

The mentor should re-read the Individual Development Plan (IDP) or last year's evaluation and then complete this form before meeting with the fellow. It is recommended that the mentor forward the completed form to the fellow before the meeting.

Research Accomplishments

1. Discuss the progress toward achieving the research goals from the last evaluation.
2. How often do you meet with the fellow? Is this schedule optimal?
3. Are the goals of each meeting accomplished? If not, what could you do to improve this?
4. Were efforts toward publications and presentations satisfactory? If not, what improvements could be made?
5. Discuss the fellow's research goals for the next year.

Research Proficiency

1. Discuss the proficiency of the fellow in these areas: productivity, creativity, initiative, reliability, and performance as a team member.
2. How can the fellow improve in these areas?

Career Goals

1. Briefly state the fellow's career goals.
2. Does the fellow ask you for career advice?
3. Has the fellow participated in career workshops offered by OITE or other career guidance sources?
4. What other things could the fellow do or change to achieve his/her career goals?

Annual Progress - Fellow Form

Fellow's name _____

Date _____

The fellow should re-read the Individual Development Plan (IDP) or last year's evaluation and then complete this form before meeting with their mentor. It is recommended that the fellow forward the completed form to the mentor before the meeting.

Research Accomplishments

1. Discuss the progress toward achieving the research goals from the last evaluation.
2. How often do you meet with your mentor? Is this schedule optimal?
3. Are the goals of each meeting accomplished? If not, what could you do to improve this?
4. Were efforts toward publications and presentations satisfactory? If not, what improvements could be made?
5. Discuss your research goals for the next year.

Research Proficiency

1. Discuss your proficiency in these areas: productivity, creativity, initiative, reliability, and performance as a team member.
2. How can you improve in these areas?

Career Goals

1. Briefly state your career goals.
2. Do you ask your primary or secondary mentors for career advice?
3. Have you participated in career workshops offered by OITE or other career guidance sources?
4. What other things could you do or change to achieve your career goals?