



Non-Threshold Merit Review: Professorial Series

Checklist of items that should be included in the APBears case prior to submission to APO.

*Please ensure candidate's annual certification report in OATS has been submitted before routing case to APO.

Case Overview:

Complete information fields, including case action, effective date, review period and FTE. If the faculty member is affiliated with multiple departments, please indicate FTE breakdown.

Candidate Summary:

- Course evaluations for all classes taught in review period, including all student comments
 - If any evaluations and/or student comments are unavailable, include an explanation in the comments field for the course or in the departmental recommendation
 - Indicate departmental averaging methodology
- Sabbatical leave report, if taken since last review (*see [APM 740-97](#)*)
- Indicate any leaves or course releases during the review period
- Record of graduate student, undergraduate student, and postdoctoral scholar mentoring
- Current publications list (*Word format preferred*), clearly indicate which publications have appeared since last review
 - For the book-based disciplines, any portions of work on a book in progress being submitted for credit need to be clearly identified on the publications list (*see [UCB Campus Guidelines Regarding the Crediting of Books in Progress](#)*)
 - Contributions to collaborative work should be clearly indicated
- Current Curriculum Vitae
- Self- statement, strongly preferred but not required
- Diversity statement, strongly preferred but not required (*may also be incorporated into the self-statement*)
- List of relatives employed by UC, if any, as required per [APM 520 policy](#)

Salary Recommendation:

- Enter proposed salary in AP Bears Salary recommendation tab (*sign off by Department(s) and Dean(s) required*). Salary must match what is listed in the recommendation memo(s).
 - If a range adjustment occurs (*and will be applied to the off-scale component*) after a unit has signed off on the salary tab recommendation, the subsequent reviewer should clarify this and include the new off-scale component in their recommendation, or enter an explanatory note in the General Notes text box on the Overview page.

Documents:

- Dean's recommendation memo (*not needed for normal advancement, approval in salary tab suffices*)
- Chair's recommendation memo, including:
 1. Report and analysis of teaching (*see BMAP section on [Teaching Assessment](#)*)
 - a. Courses taught since last review
 - b. Holistic summary of teaching effectiveness
 - c. Development of new instructional techniques, if applicable
 - d. Mentoring record including: graduate student, undergraduate student, and postdoctoral scholar advising since last review; describe participation on degree committees

2. Report on research activity, publications, and creative work; evaluate candidate's contribution to collaborative work or co-authored publications (*see BMAP sections on [Research and Creative Accomplishment](#) Assessment*)
3. Report on University, professional, and public service (*see BMAP sections on [Service](#) and [Professional Activity Assessments](#)*)
4. Report on contributions to diversity, equity, inclusion, and belonging (*discuss these contributions within the relevant areas of review listed above as described [here](#)*)
5. Report on special honors and awards received since last review, if any
6. If acceleration or deceleration is recommended, state justification (*see BMAP section on [Criteria for Faculty Step Accelerations](#)*)
7. Explanation of urgency, if applicable
8. Explanation of lateness, if applicable