

Training for First-time PR Writers

Finding success in the UC ANR Academic Advancement Process

Presented by the Academic Assembly Personnel Committee

Michelle Leinfelder-Miles, 2022-23 Chair

Brenna Aegerter

Mary Blackburn

*With special thanks to Steven Worker, Peer Review Committee co-chair
and Katherine Webb-Martinez, Program Planning and Evaluation*

 **UNIVERSITY OF CALIFORNIA**
Agriculture and Natural Resources

2022-23 Academic advancement process trainings

- **Wednesday, December 7, 2022 (1:30-3pm)**
Training for Brand New Academics. New to UC ANR? Welcome! Let the Personnel Committee help orient you on the alphabet soup of the advancement cycle. What's an AE? What's a PR? When are the deadlines, and what are the requirements? Come to this training to learn more.
- **Wednesday, December 14, 2022 (1:30-3pm)**
Training for first-time PR writers. You've written an Annual Evaluation, but now it's time to tackle a Program Review dossier. Come to this training and take a deep dive into the Ebook – your guide to writing effective PRs.
- **Tuesday, January 17, 2023 (2-3pm) AND Wednesday, January 25, 2023 (2-3pm)**
Advancement Cycle Q&A Sessions. At these trainings, the Personnel Committee will provide a short presentation on Ebook updates, and then the floor will be opened to Q&A. The short presentation will be the same on both days. Please come with your questions!

Overseeing the academic advancement process

Academic Assembly Personnel Committee

- Consists of 9 ANR academics, 3-year terms, appointed by the Academic Assembly Rules & Elections Committee
- Reviews policies around appointments, evaluations, merit & promotions. Takes the lead in revising the eBook.

Academic HR (*Anna Lee & Pam Tise*)

- Coordinates the advancement process, tracks academic's advancement actions, administrative and logistical

Peer Review Committee (Vice Provost Daniel Obrist)

- Reviews PR dossiers in May annually and makes a recommendation to the AVP.

Associate Vice President (Deanne Meyer)

- Makes the final decision on advancement requests.
- Has delegated authority to establish all advancement procedures (APM 335)



Name	Title	Term
Michelle Leinfelder-Miles (Chair)	Advisor	2024
Brenna Aegerter	Advisor	2023
Khaled Bali	Specialist	2023
Vacant	Advisor	
Mary Blackburn	Advisor	2023
Mark Bolda	Advisor	2025
Anne Iaccopucci	Academic Coord.	2023
Ali Montazar (ex-officio/ AAC President)	Advisor	
Etaferahu Takele	Advisor	2024
Karey Windbiel-Rojas	Advisor	2025

Annual reporting requirements for academics



Organizational Reporting & Civil Rights Compliance

Submitted in Project Board

Period: October 1 to September 30

Due February 1



FTE Reporting

Submitted in Project Board

Period: July 1 to June 30

Due July 1



Program Review & Annual Evaluation

Uploaded through a workflow automation system, integrated with Project Board

Period: October 1 to September 30

Due February 1

Project Board: ANR's online system that integrates civil rights compliance and organizational reporting requirements. It also has an optional component to help academics organize information for program review and annual evaluation.

Project Board is required for civil rights compliance and FTE reporting

- Academics are not required to use the Project Board dossier export for advancement.

UNIVERSITY OF CALIFORNIA
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Michelle ▾

Project Board Themes Projects Activities Clientele F.T.E. Review and Compile Explore

Activities

Extension, Effort, Research, Creative University and Public Service Professional Competence

+ Add Activity Search Activities Upcoming and Recent All

Start Date mm/dd/yyyy End Date mm/dd/yyyy Missing Information Reset Filters

Activity Type Theme(s) Project(s)

Name	Type	Theme/Project	Tags	Date ↑
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Academic evaluation

All academic appointees are evaluated by their immediate and secondary supervisor (if applicable) on an annual basis, except for years in which the appointee seeks advancement by submitting a program review dossier.

The alphabet soup of academic evaluation

AE

- Annual Evaluation
- Completed in the years one does not submit a program review dossier.

PR dossier

- Program Review Dossier
- Materials submitted to request advancement (e.g., merit, promotion)

eBook

- Officially named *Guidelines for UC ANR Academics Preparing the Thematic Program Review Dossier*
- Tells you what materials to submit for advancement

AHR

- Academic human resources

APM & PPM

- Academic Personnel Manual (UC)
- Policies and Procedures Manual (ANR)

Annual Evaluation and Program Review

- Purpose: Review of an academic appointee's progress towards goals and review of planned goals.
- Who? Between academic & supervisor only.
- What? Bulleted lists. It is designed to be simple and useful; there is no narrative.
- See template on Academic Human Resources website.

Annual Evaluation



AE

- Purpose: Evaluate the performance of an academic for advancement to the next step or rank.
- Who? Evaluated by supervisor, colleagues and clientele (for promotions), ad hoc review committee (for promotions), and the peer review committee, with a decision by the Associate Vice President.
- What? Your dossier: Cover page, narrative, supporting documentation, and other elements.

Program Review (Merit & Promotion)



Academic advancement

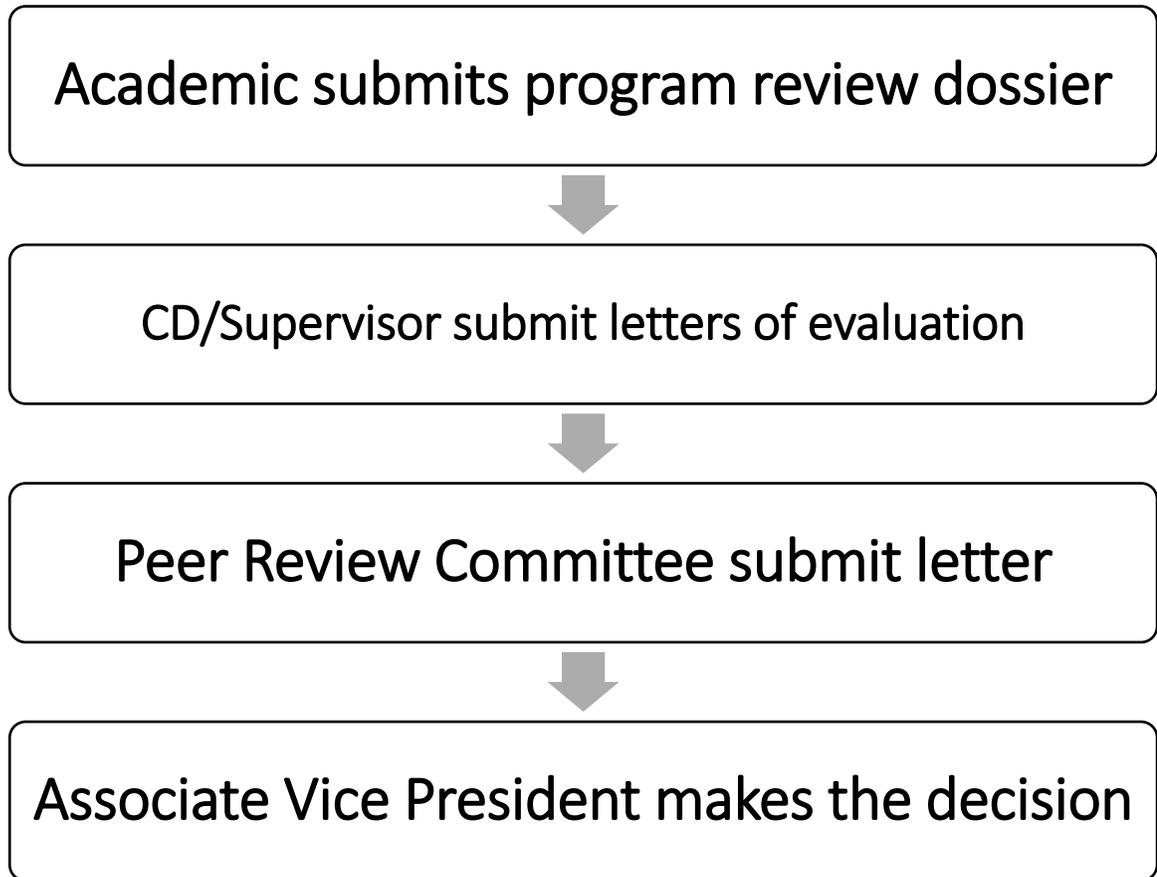
The purpose of academic review is to evaluate the performance of UC ANR academics for advancement, provide a record of the academic's professional career in UC ANR, and assist academics with program planning.

Case Types

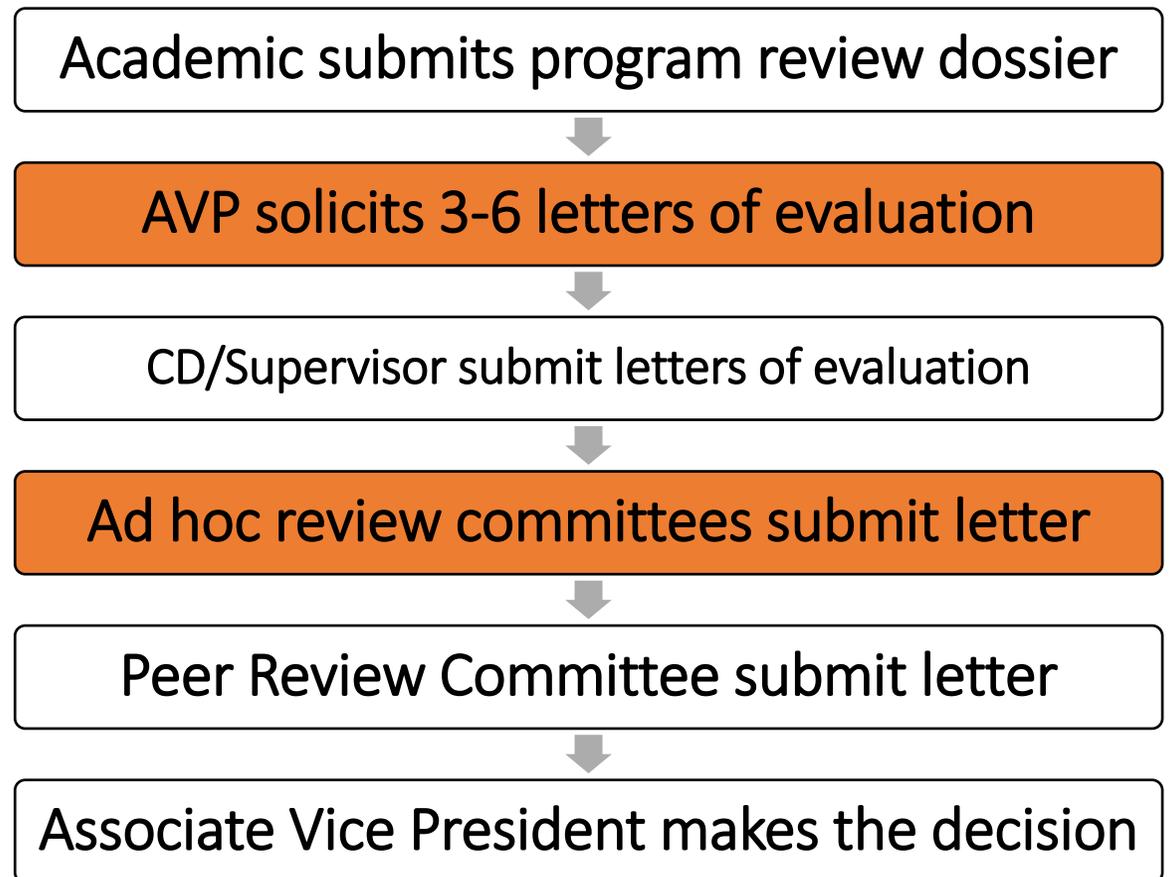
- **Merit** - advancement from one step to the next step. Dossiers highlight academic accomplishments since the last successful salary action.
- **Promotion** – a career milestone advancement from one rank to the next rank, or from full title V to VI, or from full title IX to above scale. Dossiers highlight academic accomplishments for all years in current rank.
- **Term reviews seeking indefinite status** (aka “third term reviews,” typically concurrent with another advancement type). Dossiers highlight academic accomplishments since hire.
- **Acceleration** - a merit or promotion action that recognizes academics who perform at an exceptional level during a specific review period.

Multiple Step Process

Merit



Promotion



Definite status

- At hire, academics have definite status; a definite “term” appointment is for a specific period and ends on a specified date.
- A successful advancement action (i.e. merit or promotion) results in a new term end date; a negative action carries the possibility of non-reappointment.
- Academics with definite term appointments are not eligible to defer a merit advancement that coincides with a term review, unless there are extenuating circumstances, reviewed on a case-by-base basis.
 - Academic administrators and academic coordinators, as well as advisors and specialists with a 0% indefinite appointment, may have the option to defer, with the approval of their supervisor.
- For advisors and specialists, indefinite status eligibility would be noted on the Position Vacancy Announcement (PVA) – generally meaning there is long-term funding for the position.

Indefinite status

- UC ANR academics do not earn tenure, but they may earn indefinite status.
- An indefinite “term” appointment has no specified end date unless terminated by layoff, retirement, demotion, dismissal, resignation, separation, or death.
- Advisors may seek indefinite status concurrent with their third program review (i.e. merit or promotion).
- Specialists are considered for an indefinite appointment upon promotion to the Associate Rank.

Peer review process

The peer review committee provides an evaluation of academic accomplishments and impact, to support our colleagues in reaching their fullest potential, and thereby strengthening the UC ANR network to improve the lives of Californians.

Evaluate, Recommend, Document

Evaluate

- Evaluate an academic's performance and achievement as documented in their program review dossier, against advancement expectations for the rank/step and against the academic's position description.

Recommend

- Recommendations are made by the Peer Review Committee (PRC) and ad-hoc committee (where applicable).
- Make individual yes or no recommendations, which are recorded.

Document

- Provide a balanced written assessment. The written appraisal should be specific and analytical, based on the evidence presented in the dossier.
- Letter(s) reviewed by the Associate Vice President and the candidate.

What is the Peer Review Committee (PRC)?

- 14 PRC members appointed by the Associate Vice President for three years with overlapping terms.
- Strives to reflect the breadth of UC ANR's programmatic areas, title series, and administrative assignments.

Name	Term Ends	Academic Title
Barry, Sheila	12/31/2023	CE Advisor
de la Fuente, Maria	12/31/2023	CE Advisor
Diaz-Ramirez, Jairo	8/15/2025 (New)	Acadm. Admin. 7
Espinoza, Dorina	8/15/2025 (New)	CE Advisor
Haviland, David	12/31/2023	CE Advisor
Ira, Greg	8/15/2024	Academic Coord. 3
Lacan, Igor	8/15/2024	CE Advisor
Lyons, Andy	8/15/2025 (New)	Academic Coord. 3
McDonald, Chris	8/15/2025 (New)	CE Advisor
Niederholzer, Franz	8/15/2025 (New)	CE Advisor
Pathak, Tapan	8/15/2024	Specialist in CE
Quinn, Niamh	8/15/2025 (New)	CE Advisor
Ritchie, Lorrene	8/15/2024	Specialist in CE
Valachovic, Yana	8/15/2025 (New)	CE Advisor

What are ad-hoc committees?

- Anonymous review committees, generally made up of three peers across different disciplines.
- Purpose: evaluate the academic's performance as documented in the dossier and provide written assessment and recommendation to the PRC and AVP.
- The review is made available to the candidate, but the composition of the committee is anonymous.

Multiple Step Process (eBook p. 7)

- **Step 1:** Academic Enters Data into ANR Project Board
- **Step 2:** Primary Supervisor Submit Intended Actions by September 19, 2022
- **Step 3:** Academic Prepares their Goals for the Coming Year and Submits to Supervisor.
- **Step 4: Academics Submit their Program Review Dossier by February 1, 2023**
- **Step 5:** Associate Vice President and Vice Provost for Academic Personnel solicit Confidential Letters of Evaluation, due by March 13, 2023 (*only for promotions, term reviews seeking indefinite status, and career review*)
- **Step 6:** Supervisor(s) Provide Letter of Evaluation due by March 17, 2023
- **Step 7:** Ad Hoc Review Committee's Evaluation due by April 3, 2023 (*only for promotions, term reviews seeking indefinite status, career review, administrative reviews, career equity reviews, as well as cases by request of the candidate, supervisor, Vice Provosts, or Associate Vice President*)
- **Step 8:** Peer Review Committee's Evaluation (April and May)
- **Step 9:** Associate Vice President's Decision on Advancement (June)
- **Possible Step 10:** Appeal of Negative Advancement Decision

Elements of the Program Review dossier

Telling your story and highlighting your impact

Evaluation criteria

Academics are evaluated against their **position description** and the **advancement criteria** as outlined in the [Guidelines for Preparing the Thematic Program Review Dossier](#) (eBook)

Four advancement criteria for CE Advisors*:

- applied research and creative activity
- extending knowledge and information
- professional competence and activity
- university and public service

Additional consideration: affirmative action/civil rights compliance

* Differs for Academic Coordinators and Academic Administrators.

2023 Dossier Elements	Academic's Requested Action		
	Merit or Accelerated Merit	Promotion or Accelerated Promotion, Career Review, or Career Equity Review	Term Reviews Seeking Indefinite Status (Usually concurrent with merit or promotion advancement)
Information to include:	Period since the last successful salary action	<ul style="list-style-type: none"> Promotion: Period covering all years in rank Career Review to VI: period covering all years in full title Career Review to above scale: period covering years full title VI-IX 	Period since date of hire
I. Position description (signed)	Required	Required	Required
II. Cover page	Required	Required	Required
III. Acceleration Statement	If applicable, 1 page	If applicable, 1 page	If applicable, 1 page
IV. Program summary narrative	<ul style="list-style-type: none"> Program Summary Narrative (required, 6-page maximum) Statement of Special Circumstances (if applicable, for those with restrictions on advancement criteria. See Section 2E.) 	<ul style="list-style-type: none"> Program Summary Narrative (required, 10-page maximum) Statement of Special Circumstances (if applicable, for those with restrictions on advancement criteria. See Section 2E) 	<ul style="list-style-type: none"> Program Summary Narrative (required, 10-page maximum) Statement of Special Circumstances (if applicable, for those with restrictions on advancement criteria. See Section 2E.)
V. Supporting documentation	Professional competence, service, project summary, and Extension activities.	Professional competence, service, project summary, and Extension activities.	Professional competence, service, project summary, and Extension activities.
Publications (Bibliography)	Required in supporting documentation (unless not applicable per title). Letters of acceptance required for in-press papers	Required in supporting documentation (unless not applicable per title). Letters of acceptance required for in-press papers	Required in supporting documentation (unless not applicable per title). Letters of acceptance required for in-press papers
Summary of publication examples (3 examples, 1-page maximum, hyperlink to publications)	Optional in supporting documentation	Required in supporting documentation	Follows merit or promotion guidelines.
VI. Sabbatical leave plan and report	If applicable	If applicable	If applicable
VII. Work plan	If applicable	If applicable	If applicable
VIII. Goals	Required to complete; optional to include in dossier	Required to complete; optional to include in dossier	Required to complete; optional to include in dossier
Additional material included during the review process (not completed by the academic themselves)			
Letters of evaluations	No	Required	Required
Supervisor(s) letter of evaluation(s)	Required	Required	Required
Ad hoc review committee evaluation	No	Required	Required
Peer review committee recommendation*	Required*	Required*	Required*

I. Position description

- Position description template is available from the AHR website
- Plan ahead! Position descriptions ***require the signature and date*** of the academic, their immediate supervisor, their supervisor's supervisor, and the Statewide Program Director (if applicable).
- It is the academic's responsibility to keep their PD up-to-date when there is a change in responsibility and/or reporting relationships.
- Use an addendum for short-term changes in responsibility.

IV. Program narrative

- Describes the academic's program, providing evidence on how the academic met the applicable advancement criteria aligned with their rank/step **and** position description.
- Recommended components of the narrative (eBook page 24):
 - Introduction (statement of assignment)
 - *Statement of special circumstances (if applicable)
 - Programmatic themes
 - *For academic administrators: administrative experience
 - *For academic coordinators: coordination of academic programs
 - Professional competence and activity
 - University and public service
 - Affirmative action and contributions to DEI
 - Closing summary

Writing a thematic program review

- The program narrative must convey clear themes, each focused on at least one impact (or anticipated impact)
- Themes are the constructs for reporting goals, inputs, methods, efforts, outputs, outcomes, and impacts
- E-Book guidance: Typically 1 to 3 themes
- Strategies for defining themes: ANR condition changes, strategic initiatives, statewide programs, your job title, Workgroup or Program Team affiliations
- Look for commonality in activities and/or goals. There is no right or wrong way!
- Themes don't need to be the same size and scope
- For each theme, speak to **how your program is making a difference to your clientele. Reference your supporting documentation as evidence that your efforts are contributing to impact.**

For each theme, narratives should include: outcomes

Outcomes – measurable change in:

- **clientele learning** (knowledge, attitude/intent to change, skills)
- **clientele behavior/practices**, and/or
- **policy/decision-making**

Quantified outcome indicators (how many individuals? how many acres?)

Outcomes measured/observed during this review period that are the result of activities from past review periods may be included

For each theme, narratives should include: impact

Impact – broader effect on social, environmental, economic conditions that are aligned with the targeted clientele needs; and aligned with ANR's articulated [public value statements](#) and [condition changes](#).

Evidence of impact (**or anticipated impact**) may be demonstrated through empirical data collected by the academic, workgroup projects, and/or inferred impact as shown through reasonable inferences from scholarly literature.

Writing a compelling narrative

What did you do?

Why did you do it?

How did you do it?

Who helped you do it?



**What
difference
did you
make?**

Telling your story: make it personal

- Demonstrate that you know where you are headed (i.e. you have clear goals)
- Clearly relate your activities to your progress towards your intended outcomes (& condition changes)
- Tell the story at a higher level; avoid too many details
- Highlight your role
- The story is about you, your team, and the people you serve. Don't be afraid to express your feelings and let your passion shine through



V. Supporting documentation

- Academics decide how to share their activities in a format to support their program summary narrative.
- Academics may elect to use the traditional table format, an annotated bulleted list, enhanced curriculum vitae, or another method.
- If using the Project Board output, review the exported files, and edit as needed.
- Notes: Academics are encouraged:
 - **not** to include required UC trainings (e.g., sexual harassment or cybersecurity)
 - **not** to include posters in their bibliography
 - hyperlink to the publication online and not include the document or text itself

Differentiating Activities

- **University service***: activity that helps University students, staff, or academics. If an academic is presenting to a University of California class or group, the activity would fall into this classification.
- **Public service**: activities where the academic uses their professional expertise to benefit groups or activities outside the University of California.
- **Extension activities**: targeted at one's defined clientele.
- **Professional competency**: activity that reflects professional standing in your programmatic area.

* Academics with Restrictions on Advancement Criteria, see eBook pages 14-15. Restrictions are to be documented in one's position description and in the narrative (in a "statement of special circumstances").

V. Supporting documentation: bibliography

- Your bibliography should clearly describe peer reviewed and non-peer reviewed publications in separate sections.
 - Peer reviewed publications are not an expectation in the lower ranks, but they are increasingly important as the academic progresses in their career.
- Citations should be further identified using the letter designations in the eBook (see pages 29-30).
- Highlight or color-code the citations from the current review period.
- Identify your activity/role in multi-author citations.
- A hyperlink to the publication is recommended.

Tips for preparing an effective program review

- Develop a system of keeping track of your activities.
- Start early!
- Know your audience: supervisor, peer review committee, ad-hoc (if applicable), and Associate Vice President.
- Make it readable; use lay terms; avoid acronyms.
- Proofread. Then, have colleagues proofread, especially some from other disciplines.
- Be concise. If relevant, use graphics/graphs to show impact.
- Acknowledge teamwork, but be specific about your role. Consider using active voice sentences.
- Be accurate. Use up-to-date statistics.
- Refer to your position description.
- Include administrative accomplishments (where applicable).

Reminder: Q&A Sessions in January

- **Tuesday, January 17, 2023 (2-3pm)**
- **Wednesday, January 25, 2023 (2-3pm)**
- Please come with your questions!

**Questions, comments,
discussion...**

Training for First-time PR Writers

Thank you for attending today's training!

Michelle Leinfelder-Miles, mmleinfeldermiles@ucanr.edu

Brenna Aegerter, bjaegeter@ucanr.edu

Mary Blackburn, mlblackburn@ucanr.edu

AHR website:

https://ucanr.edu/sites/anrstaff/Personnel_Benefits/Academic_Personnel/

For questions on Project Board:

Kit Alviz, kit.Alviz@ucop.edu

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