Training for First-time PR Writers

Finding success in the UC ANR Academic Advancement Process

Presented by the Academic Assembly Personnel Committee
Mark Bolda, 2024-25 Chair
Marianne Bird
Aparna Gazula

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2024-25 Academic advancement process trainings

- **Wednesday, October 23, 2024 (2:00 – 3:00 pm)**
  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.

- **Wednesday, November 6, 2024 (10—11 am) AND Wednesday, November 13, 1, 2024 (2- 3 pm)**
  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!

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Overseeing the academic advancement process

Academic Assembly Personnel Committee (PC)

- 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 Human Resources HR *(Anna Lee & Pam Tise)*

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

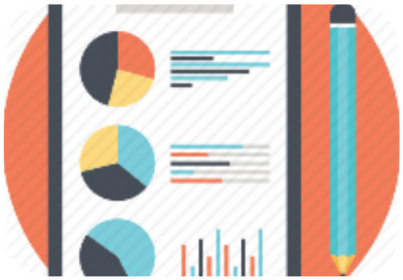
Peer Review Committee (Vice Provost –VP) Daniel Obrist

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

Associate Vice President (AVP) Brent Hales

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

Annual reporting requirements for academics



Organizational Reporting & Civil Rights Compliance

Submitted in Project Board

Period: October 1 to September 30

Due December 9

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 December 9

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 training video and slides available at https://ucanr.edu/sites/ProjectBoardHelp/

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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.

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The alphabet soup of academic evaluation

AE	PR dossier	eBook	AHR	APM & PPM
• Annual Evaluation • Completed in the years one does not submit a program review dossier.	• Program Review Dossier • Materials submitted to request advancement (e.g., merit, promotion)	• Officially named *Guidelines for UC ANR Academics Preparing the Thematic Program Review Dossier* • Tells you what materials to submit for advancement	• Academic human resources	• Academic Personnel Manual (UC) • Policies and Procedures Manual (ANR)

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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.
- Annually except when submitting a PR

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.
- When: Typically every two to three years

Program Review
(Merit & Promotion)

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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.

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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

- Academic submits program review dossier
- CD/Supervisor submit letters of evaluation
- Peer Review Committee submit letter
- Associate Vice President makes the decision

Promotion

- Academic submits program review dossier
- AVP solicits 3-6 letters of evaluation
- CD/Supervisor submit letters of evaluation
- Ad hoc review committees submit letter
- Peer Review Committee submit letter
- Associate Vice President makes the decision

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.

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 process 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.

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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)?

- 16 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.
- Makes recommendation to the AVP

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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.

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).

Recognize that as one's career advances, one should be establishing BALANCE:

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/diversity, equity, and inclusion

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Evaluation Criteria for Specialists in Cooperative Extension

- Performance in extending knowledge and information
- Research, especially applied research, and creative work
- Professional competence and activity
- University and public service

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Evaluation Criteria for Academic Administrators

- Administrative experience (leadership, budgets, partnerships)
- Professional competence and activity
- University and public service

Evaluation Criteria for Academic Coordinators

- Coordinate academic programs through academic program development assessment; evaluation, development of proposals for extramural funding of campus programs, liaison representation with other agencies/institutions and supervision and leadership of other academic appointees or staff.
- Professional competence (intellectual leadership and scholarship to their programs).
- University and Public service (appropriate roles in governance and policy formulation; represent the University in their special capacity as scholars).

Affirmative Action and Diversity, Equity and Inclusion (DEI or EDI)

- While AA and DEI are not advancement criteria, they are critical to all parts of an academic's program.
- Project Board captures Affirmative Action and Civil Rights Compliance, but you should also reflect on these in your narrative.
- DEI is the lens through which we do our work. It is about who we are or who we want to be as an organization.
  - Your narrative should synthesize how you are being equitable and inclusive in your program delivery.
- Do not neglect this section.

Elements of the Program Review dossier

Telling your story and highlighting your impact

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Elements of the Program Review dossier

Academics submit a Program Review dossier that summarizes their accomplishments and outcomes/impacts over the review period.

Required elements

- Position description
- Cover page
- Program summary narrative (Merit: 5 pages, Promotion: 8 pages)
- Supporting documentation
- Bibliography
- Goals (optional to include in dossier)

Other elements

- Acceleration statement (if applicable)
- Summary of publication examples (optional)
- Sabbatical leave and report (if applicable)
- Work plan (if applicable)

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:
  - 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: Usually 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?

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The purpose of the program review narrative is not to tell people how busy you are; it's to tell what impact you're having.

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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 (and ultimately impacts)
- 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

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.

- Project Summary
- Professional Competence and Activity
- University and Public Service
- Extension Activities
- Bibliography – See Ebook pages 32-33 for formatting instructions
- 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

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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.

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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 32-33).
- 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. Avoid a literature review or explaining your methods. Emphasize outcomes and impacts (or anticipated impacts).
- 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).

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Reminder: Q&A Sessions

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  Please come with your questions!

Questions, comments, discussion…

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Training for First-time PR Writers

Thank you for attending today's training!

Mark Bolda, mpbolda@ucanr.edu
Aparna Gazula, agazula@ucanr.edu
Marianne Bird mbird@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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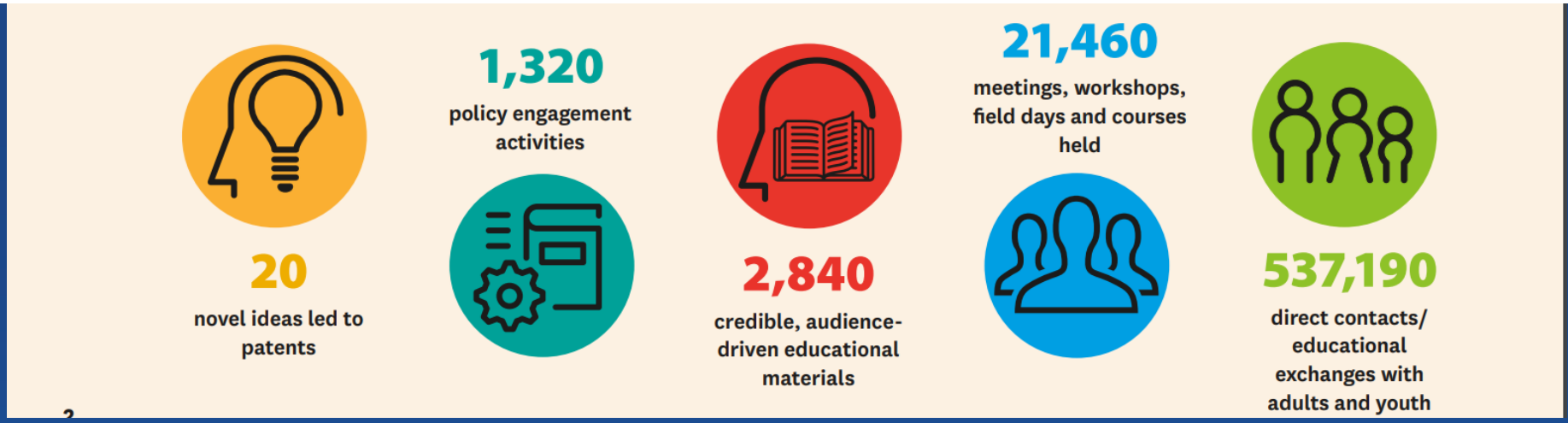

UC ANR Academic Advancement Process

Daniel Obrist, Vice Provost Academic Personnel

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Academic Advancment 2024/258 Timeline

https://ucanr.edu/sites/anrstaff/files/360712.pdf

• Actions confirmed by supervisors	July 29
• Supervisors meet with Academics to review/define goals	July - September
• Project Board and Program Development and Evaluation Capacity Building trainings	August - October
• AAC-PC training	October - November
• Submit PR dossiers to supervisors for input	November 4 (or as arranged)
• **Project Board Reporting, Annual Evaluations, PR dossiers**	**December 9**
• Required letters (supervisor, ad hoc, and external)	January 27
• PRC committee meetings	March 3 – 7
• Associate Vice President makes final decisions	May

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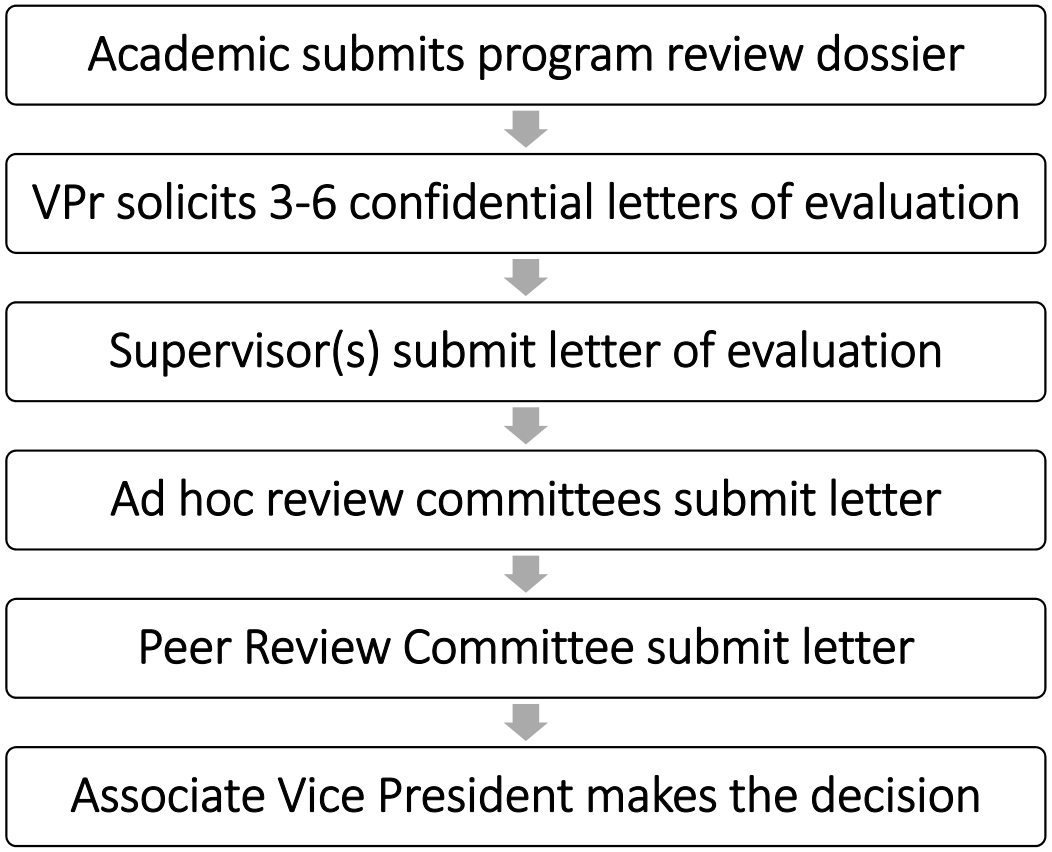
Program Review (merit and promotions): a multi-stage review process with a Peer Review Committee (PRC) review



- PRC is a critical part of a multi-stage review process, appointed by AVP Hales for 3-year overlapping terms
- Composition strives to reflect the breadth of UC ANR's programmatic areas and administrative assignments
- Merit and promotion process provides a mentorship framework and productive criticism

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Peer-review committee 2024/25

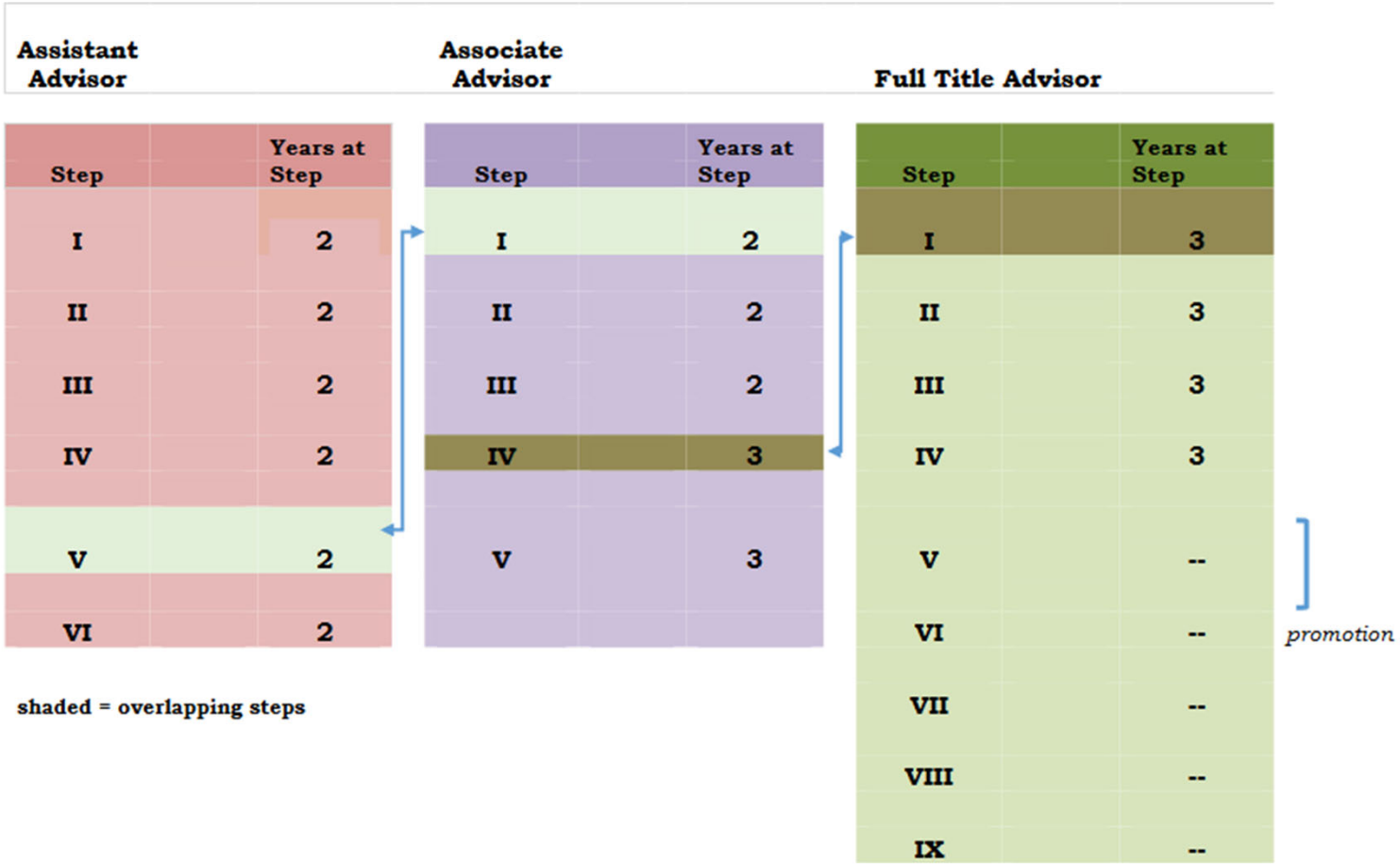
Name	Academic Title	Rank/Step	Discipline	Geography
Andrew Lyons	Academic Coordinator	AC-III / Step 4	GIS	SWP
McDonald, Chris	CE Advisor	Full Title / II	Invasive plants/weeds, Nat. resources	San Bernardino, Imperial, Riverside, San Diego
Niederholder, Franz	CE Advisor	Full Title / VI	Orchard systems (soil science)	Colusa, Sutter, Yuba
Niamh Quinn	CE Advisor	Full Title / I	Human-wildlife interaction / IPM	Orange, San Diego, LA, SCREC
Yana Valachovic	CE Advisor	Full Title / VI	Forests, wildfire	Humboldt, Del Norte
Brooke Latack	CE Advisor	Associate / I	Livestock	Imperial, Riverside, San Bernardino
Michael Jones	CE Advisor	Assistant / V	Forestry	Lake, Mendocino, Sonoma
Zheng Wang	CE Advisor	Associate / III	Vegetable Crop	Merced, San Joaquin, Stanislaus
L. Karina Diaz Rios	CE Specialist	Associate / II	Nutrition	UC Merced
Brenna Aegerter	CE Advisor	Full Title / IV	Vegetable Crops, Plant Pathology	San Joaquin County
Steven Worker	CE Advisor	Full Title / III	4-H	Marin, Sonoma, Napa
Natalie Price	CE Advisor	Associate / I	Public Health	Los Angeles & Orange
Joji Muramoto	CE Specialist	Associate / III	Agroecology	UCSC
Aliasghar Montazar	CE Advisor	Full Title / II	Water/Irrigation/Drainage	Imperial, Riverside
Michael Cahn	CE Advisor	Full Title / IX	Irrigation and Water Resources	Monterey, San Benito, Santa Cruz
Missy Gable	Academic Coordinator	AC-III / Step 6	Horticulture and Agronomy	Statewide UC Master Gardener Program
Non-Voting Members				
Lee, Anna	Academic HR Business Partner			
Obrist, Daniel (Chair)	Vice Provost - Academic Personnel			

Merit and Promotion Actions and Statistics

Review Year	Total # of ALL Cases	On-Schedule Actions (normal M & P)				Accelerated Actions (includes 13/24 cases)			
		# of Cases	% Approved	% Alternate	% Denied	# of Cases	% Approved	% Alternate	% Denied
2024	**69**	44	91% (40)	2% (1)	7% (3)	23	83% (19)	4% (1)	13% (3)
2023	**68**	55	84% (57)	4% (3)	12% (8)	13	85% (11)	8% (1)	8% (1)
2022	**66**	59	83% (49)	4% (2)	13% (8)	7	57% (4)	14% (1)	29% (2)
2021	**79**	65	88% (57)	7% (5)	5% (3)	14	50% (7)	29% (4)	21% (3)
2020	**65**	51	90% (46)	6% (3)	4% (2)	14	57% (8)	7% (1)	36% (5)
2019	**78**	56	87% (49)	7% (4)	6% (3)	22	68% (15)	0% (0)	32% (7)
2018	**93**	71	86% (61)	0% (0)	14% (10)	22	91% (20)	0% (0)	9% (2)
2017	**70**	53	81% (43)	8% (4)	11% (6)	17	71% (12)	6% (1)	23% (4)
2016	**82**	65	80% (52)	3% (2)	17% (11)	17	53% (9)	18% (3)	29% (5)
2015	**66**	52	90% (59)	0% (0)	10% (5)	14	72% (10)	21% (3)	7% (1)
2014	**57**	50	90% (45)	0% (0)	10% (5)	7	57% (4)	0% (0)	43% (3)

- High success rate of requested actions (90+% successful on-schedule actions)
- PRC makes **recommendations** to AVP Research and Extension (Brent Hales), not always in alignment with PRC
- Occasionally, discrepancies between review levels (e.g., supervisor vs. ad-hoc committee vs. PRC)

Progression tables: https://ucanr.edu/sites/anrstaff/files/320731.pdf



First term action and 18/30-month option

- First-term actions would normally be a merit. Promotion approvals for first-term actions are unusual as they normally lack evidence of trajectory and sustained success.
- First-term academics usually complete at least two years for those in a two-year term cycle.
- 18/30-month option:
  - The earliest a first-term academic may seek advancement is after at least eighteen (18) full months for those in a two-year term cycle (30 months for three-year cycles).**The academic must show the equivalent of 24 (or 36) months of performance in the reduced review period.**
  - Discuss this option with your supervisor.
  - Don’t just try and see what happens: negative decisions come with a cost! (If unsuccessful, one potential outcome is that the academic is not reappointed).

Early Career Expectations

- **Balance:**
  - Academic's effort between the four advancement criteria
  - Assistant rank: No balance expected yet; **some evidence in each criterion**; **emphasis on program development**
- **Career progression (eBook p. 32)**
  - In the first term, academics conduct **a formal needs assessment and identify potential collaborators**.
  - By the second term, academics have evaluated information from the needs assessment and identified pathways to developing a program.
  - By the third term, a programmatic roadmap becomes clear and has begun.
  - **Advancement from Assistant to Associate to Full title** ranks requires a maturation and integration of programming, with continual informal needs assessment providing new opportunities for programming.

- eBook tables (pp. 34-44) provide **guidance on expectations at different ranks:**
  - Variations exist among academic programs; for example, for some academics, program support may require grantsmanship in early years (Assistant rank), while for others, this will occur later.
  - Similarly, independent research may begin in the first term, while for others, it takes greater development of collaborators to initiate independent work.
  - Also note that exceeding rank expectations in one category alone (for example, a successful grant as an Assistant Advisor) does not equate to performing at a higher level).

Promotion from Assistant to Associate (CE Advisor, eBook)

- Promotion: Career milestone. Highlights all years in rank.
- PR dossier needs to include evidence of accumulation of achievement and impact.
- Positive trajectory of achievements: “Positive trajectory is influenced by the academic’s increased competence, deepened relationships with partners/networks, and strengthened organizational/supervisorial resources that afford the academic opportunities to support clientele in achieving impacts
- Demonstrate significant potential for a productive career within CE
- Demonstrate an ability to set program priorities, make long-range program planning decisions, and interact well with colleagues and clientele
- Demonstrate initiative and leadership in program development and delivery with sufficient programmatic evaluation
- The program must be clearly moving toward balance

Outcomes and Impacts:

- These will likely emerge later in your program, but think about it early on integrate into your PR dossier.
- eBook: “Document **anticipated** program outcomes and impacts.”

Outcomes and impact:

- Evidence how the academic’s program is moving towards **achieving impact over time** (i.e., a positive trajectory of achievements over one’s ANR career).
- **Outcomes** – measurable change in clientele **learning** (knowledge, attitude/intent to change, skills), **behavior/practices**, and/or **policy/decision-making**.
  - Quantified outcome indicators.
  - Outcomes measured/observed during this review period that are the result of activities from past review periods may be included.
- **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.

Some helpful resources: PPE training

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Program Planning and Evaluation (PPE) capacity building training:

- Defining Clientele & Affirmative Action Planning
- Improving All Reasonable Effort and Engagement with Diverse Audiences
- Conducting a Needs Assessment
- Practical Methods to Measuring Outcomes
- Using Ripple Effects Mapping (REM) Method in Program Evaluation
- Best Practices for Developing Surveys & Basics of Sampling Methods
- Methods to Analyze Surveys:
  - Part 1 Continuous Quantitative Data (Analyzing and Presenting Pre-Post Evaluation Survey Data)
  - Part 2 Discrete Quantitative Data
  - Part 3 Qualitative Data
- Writing Strong Impact Statements

Mistakes to avoid

- Wait until the last minute to write your PR dossier, formatting, and editorial issues
- Lack of review of PR dossier (by supervisor, colleagues, friends)
- Unclear/confusing themes and structure, unclear role of academics in projects/achievements
- Information from outside the review period (e.g., publications from prior appointments)
- Unclear position expectations and PDs
- Applying for 18/30-month options when achievements do not meet 24-month equivalency
- Rare, but serious: Academic misconduct

Resource Page

- UC APM (Academic Personnel Manuals): https://www.ucop.edu/academic-personnel-programs/academic-personnel-policy/index.html
  - 220 Professor Series: 220-80-c, 220-80-d, 220-80-e, 220-80-h, 220-80-i, 220-80-j, and 220-84-b, modified as appropriate.
  - Specific sections for title series; e.g., **375 Academic Coordinators; 335 CE Advisors; 334 CE Specialist**
- ANR PPM 315 (Policy and Procedure Manual): Advancement: https://ucanrpolicy.ellucid.com/documents/view/122/active/
- Guidelines for Preparing the Thematic Program Review Dossier for UC ANR Academics (aka **eBook**): https://ucanr.edu/sites/anrstaff/files/360690.pdf
- Annual Evaluation Process: https://ucanr.edu/sites/anrstaff/Personnel_Benefits/Academic_Personnel/Annual_Evaluation_Process_/
- Academic HR merit and promotion https://ucanr.edu/sites/anrstaff/Personnel_Benefits/Academic_Personnel/Merit_and_promotion_process/