

# Charting Your Advancement Path

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This is being recorded



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# Objectives

Academics and Supervisors understand

1. Current performance evaluation cycle,
2. Options, and
3. Performance expectations

# What we'll cover

1. What's in a Performance Review
2. Activity Versus Accomplishments
3. Career Progression Charts and Action Options
4. Trajectory
5. Start Your Package Early!

**Q&A**

# 1. What's in a Performance Review





# 1. Performance Review (PR) - What is it?

A PR should really be fairly straight forward

A PR is the opportunity to highlight (for the Associate Vice President and colleagues on the Performance Review Committee)

1. The difference you are making (driven by your goals), and
2. The trajectory you are on towards impact.

You tell your story through a narrative.



# What's in a Performance Review?

In summary, a PR shows that

- You know where you are headed (i.e., you have clear goals)
- You have clear intended outcomes (condition changes)
- You are making a difference (accomplishments)

You'll also show

- Evidence of scholarship (your professional capacity), scholarly activity, and creativity
- “Balance” across the reporting criteria (your research and extension accomplishments and impact, your professional competence and your service)

## 2. Activity versus accomplishments



# For all your Evaluations

**The focus is on the difference you make - not on lists of activities.**

**Obviously, you will draw on what you have done and what you will do, but keep the focus on impact.**

**i.e., “What difference did those activities make and/or what differences are they leading to?”**





So, clear goals are key

**Goals indicate your focus and where you are going.**

**Clear goals let you know if you are on track.**

**Observation:**

**People often confuse activities, objectives, goals and themes.**

**(You can learn about the difference on the Learning & Development site)**

# Activity versus accomplishments

Activity means I am doing something.



Accomplishment means I'm getting somewhere

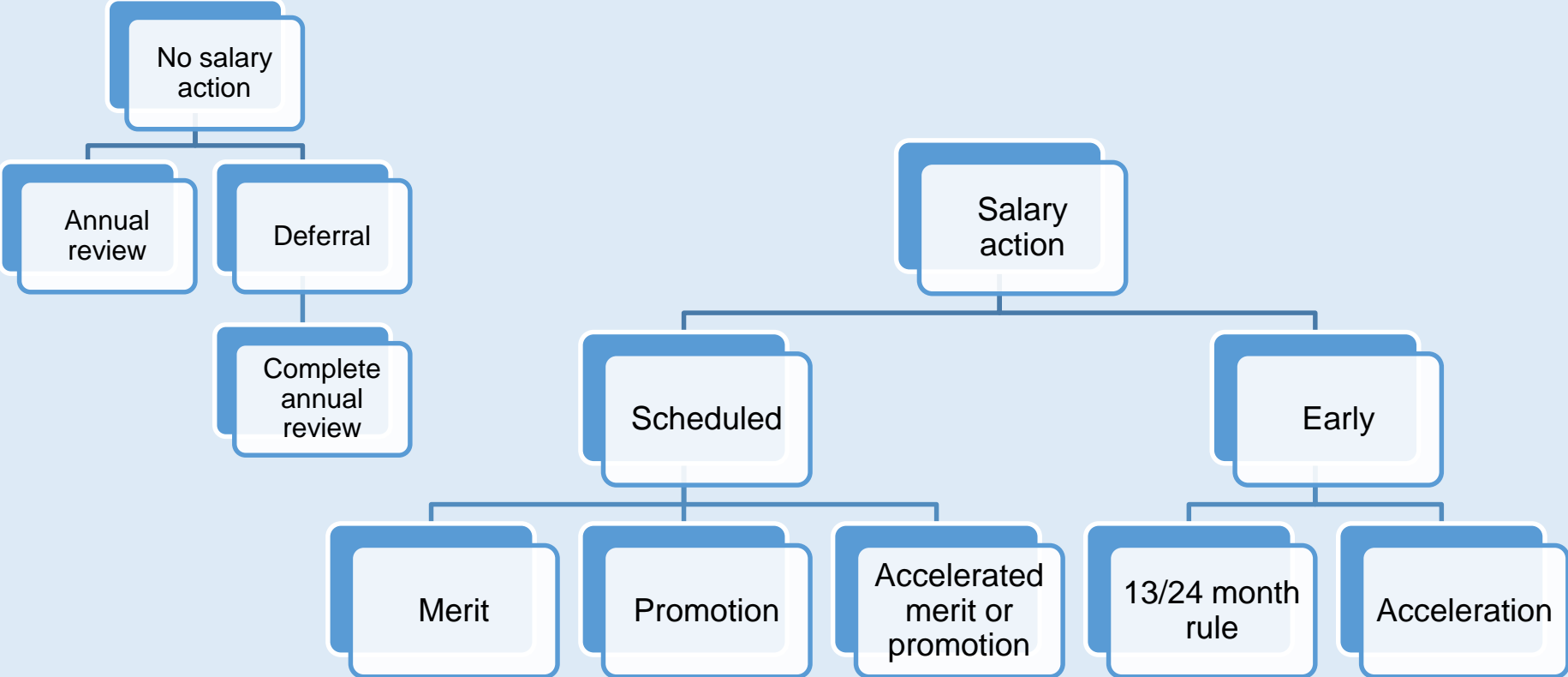


# 3. What Action Should I Seek?





# Salary action options – it's complicated



# Salary action deferrals

- Candidates can opt to defer their salary action, delaying the action by one year
- All academics must be reviewed at least every 5 years
  - CE Advisors in Full Title Step V and above can defer twice, for a total of 5 years in between review periods
- Academics may seek a deferral due to a number of reasons (personal and professional)
- COVID accommodation – through the review period ending 9/30/2022, academics may request, *once*, to defer a salary action request as a result of program disruption due to COVID; their review period is therefore extended by 1 year
  - Note implications for those with appointment terms; considered during request review

# Term review options – it's complicated, too

- Often, but not always, in conjunction with a salary action review
- Historically, indefinite status sought in conjunction with a promotion review
  - CE Advisors hired at Steps 1 through 3
  - Similar expectations of a demonstrated 'sustained trajectory'
- Deferrals granted, following consultation with and approval by the AVP
  - Requires a term extension
  - Not subject to the COVID accommodation (consultation and approval required)



# Options & Considerations

**Overlapping steps: Merit versus promotion?**

**Acceleration**

**Next action following an unsuccessful review**



# Career progression chart

## CE ADVISORS

Assistant Advisor		Associate Advisor		Full Title Advisor	
Step	Years at Step	Step	Years at Step	Step	Years at Step
I	2	I	2	I	3
II	2	II	2	II	3
III	2	III	2	III	3
IV	2	IV	3	IV	3
V	2	V	3	V	--
VI	2			VI	--
				VII	--
				VIII	--
				IX	--

shaded = overlapping steps

-- at least 3 yrs

*promotion*

# Merit versus promotion

Merit = move between steps within a rank (e.g., step II to III)

Promotion = move between ranks (e.g., Assistant to Associate)





# A note on promotion versus merit

So should I go for a promotion or a merit?

Note that a **promotion** requires more indicators of success (e.g., a demonstrated and sustained trajectory, letters of evaluation, etc.) than a **merit** advancement within the same rank.

So if you have only been in your current role for a short period, then the promotion is a bigger hurdle. Candidates should also consider that a **promotion** denial can come with more serious implications (including denial of a term appointment).



# 4. Trajectory



SpaceX/Imagery

Think of it as slope

- looking for a positive slope (trajectory).
- 2 points essential to determine slope.
- More than 2 points needed to see the change in slope over time (trajectory).



# What's meant by Trajectory? (1 of 2)



Your story conveys your trajectory (i.e., your pathway to impact). Your trajectory increases as your career progresses and will be increasingly conveyed through the evidence of change.

# What's meant by Trajectory? (2 of 2)



- Your program will grow & change
- gaining focus and a steeper trajectory as you advance.
  - Impact becomes more evident as time progresses.
  - Other factors like leadership, mentorship and service also grow.



# A comment on Accelerations

Don't fall into the trap of:

“Apply, you've got nothing to lose”.

- It is not true!
- Avoid disappointment
- Acceleration doesn't mean “doing well.”
- “Doing well” is expected as the standard.

- Acceleration means increased accomplishments in less time.
- It means exceptional achievement in at least one of the academic criteria (called the driver) and greater than normal productivity in all the other advancement criteria (applicable to rank and step).

Note: you can find those specific criteria in the e-Book.



# Consider the consequences

- When term reviews are tied to salary action reviews, there is risk of termination
- When in indefinite status, possibility of corrective action following denial of a requested salary action remains
  - Demotion or termination following 2 unsuccessful reviews (includes AE)

# Subsequent action following unsuccessful review

- Next expected review at the end of one full cycle
  - Seeking next action sooner is not considered an acceleration
- Evaluation is based on the accrued accomplishments since last successful review
  - Review period begins at the start of review period since last review
  - ‘Accomplishments jar’ isn’t emptied following the unsuccessful review period but is instead considered in addition to new accomplishments since that review period

# Deferrals

- A useful tool to reduce stress and ensure preparedness
- Sometimes it takes longer to accrue the accomplishments necessary to advance
  - Endless reasons why, both personal and professional
- Evaluation is based on the accrued accomplishments, not the rate of accrual
  - Acceleration suggests accomplishments were accrued in less time
    - Likely limitation on what can be achieved in a finite period of time
  - Deferral reflects a need for more time to accrue the necessary accomplishments
    - Policy requires review at least every 5 years



# 5. Start Early

1. Time to craft a strong narrative supporting documentation
1. Time for review and feedback followed by iteration





## Narrative: Where to start?

In writing your narrative, share your progress (for the review period). To do this, you need

1. clear goals
2. tell the story at a very aggregated level, and
3. from the perspective of how your select activities make progress towards your intended changes (target condition changes).

# In your story

Blend in elements to tell your story of scholarly (creative and advanced learning) activities including:

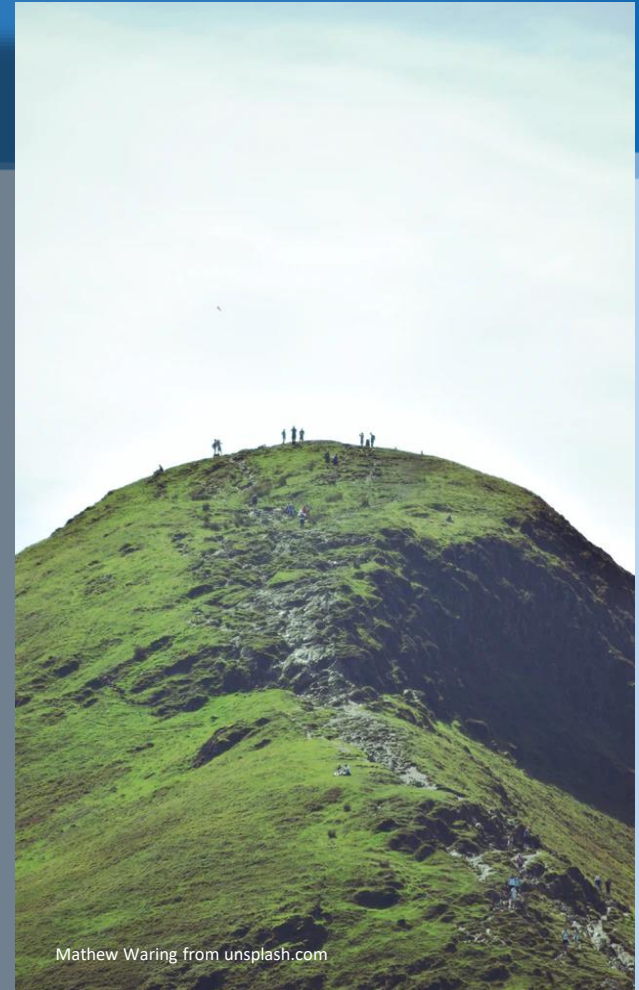
1. Impacts (or progress towards desired change)
2. Supporting examples of scholarship/creativity
3. Evidence of professional competency and continuous improvement
4. Commitment to diversity, inclusion, and equity
5. Evidence of good citizenship
6. Leadership and teamwork, indicating your role(s)
7. Service and mentoring (noting increasing expectations as one progresses)

For the above, call out the strongest supporting evidence (which may appear in select tables) – not all.

# Finish Strong

In your closing statement indicate what you are working towards – where are you headed?

Sustained trajectory is the expectation post-assistant rank. Remember, the reflection is on your package and program as a whole.



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# As a Supervisor - What makes for success?

**A successful program has focus!**

Clear goals provide that focus.

As supervisor, you should meet regularly to ensure there are clear long term goals with clear intended outcomes (note: a logic model can help).

Honest, constructive feedback is a supervisor responsibility.





**Q&A**

**More resources at  
[ucanr.edu/L&D](https://ucanr.edu/L&D)**