Guidelines for UC ANR Academics Preparing the Thematic Program Review Dossier

For the period ending September 30, 2026

The deadline for uploading your program review dossier is
11:59 PM, December 7, 2026.
There will be no extensions beyond the deadline.

Compiled and Edited by
Vice Provost for Academic Personnel and Academic Human Resources Office, in collaboration with the Academic Assembly Personnel and Peer Review committees

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Introduction

University of California, Agriculture and Natural Resources (UC ANR) academics may seek advancement by submitting a program review dossier (PR) as outlined in the UC Academic Personnel Policy Manual and the ANR Policy and Procedures Manual Section 300: Academic Personnel. These guidelines apply to academics subject to UC ANR-based policies and procedures. The program review process is intended to:

- Evaluate the performance of UC ANR academics for advancement.
- Document inputs, methods/outputs (activities and participation), outcomes, impacts, and condition changes.
- Provide a record of the academic's professional career in UC ANR.
- Assist academics with developing goals and program planning.

This document, Guidelines for Preparing the Thematic Program Review Dossier (referred to as the "**eBook**"), was developed jointly by UC ANR leadership, the Academic Human Resources Office, and the Academic Assembly Committee's Personnel Committee, with input from the Peer Review Committee (PRC). *Guidelines for Preparing the Thematic Program Review Dossier* and the UC ANR advancement process pertain to the following academic title series: (a) Professional Researcher, (b) Project Scientist, (c) Specialist (non-Cooperative Extension), (d) Specialist in Cooperative Extension, (e) Cooperative Extension Advisor, (f) Academic Administrator, and (g) Academic Coordinator.

SECTION 1: Program Review Dossier Preparation and Review Process

All academics must submit an annual evaluation or a PR unless the academic is on: (a) sick leave and/or family medical leave; (b) sabbatical leave; or (c) has submitted an intent to retire letter effective July 1, 2027 or earlier. The review cycle for each year is from October 1 to September 30. The PR is evaluated by the supervisor(s), internal and external colleagues and clientele (if applicable), an ad hoc review committee (if applicable), and the PRC, with a decision made by the Associate Vice President. The academic's performance and achievements are assessed with applicable advancement criteria for the respective rank and step, as well as the position description.

Types of Academic Advancement

There are four types of academic advancements: merit, promotion, acceleration, or correcting an inequity. The criteria for the first three types of advancements are pre-established performance standards outlined in the University of California Academic Personnel Manual. A promotion or increase is not automatic after the number of years of service stated for each step.

Merit. Merit is an advancement from one step to the next step. Dossiers highlight academic accomplishments since the last successful salary action. Merits are sought by Academic

Coordinators, Academic Administrators, Professional Researchers, Project Scientists, Specialists, Specialists in Cooperative Extension, and Cooperative Extension Advisors seeking a step advancement within the ranks of assistant, associate, and advancement between steps full title I-V and to VII, VIII, IX. (Advancement to full title VI and above scale follows promotion guidelines).

Promotion. Promotion is a career milestone advancement from one rank to the next rank or from full title V to VI. Dossiers highlight academic accomplishments for all years in the current rank. Promotions may be sought by Professional Researchers, Project Scientists, Specialists (non-Cooperative Extension), Specialists in Cooperative Extension, and Cooperative Extension Advisors seeking advancement to the next rank (e.g., assistant to associate or associate to full title). The promotion process is also used for *career reviews* of Specialists in Cooperative Extension and Cooperative Extension Advisors seeking advancement from full title V to VI or IX to above scale (does not apply to Professional Researchers and Project Scientists). Candidates seeking advancement to full title VI include information on accomplishments covering full title I to V; candidates seeking advancement to full title above scale (above step IX) include information on accomplishments covering full title VI to IX.

Acceleration. Accelerated advancement is a form of progression that recognizes academics who perform at an exceptional level during the review period. An acceleration is a request by the academic (all title series are eligible) to advance when evidence of achievement and/or impact is sufficient to request an advancement ahead of the normal merit cycle. Accelerations are either a merit or promotion action. Accelerations may be off-cycle (i.e., advancing before the normal cycle) or on-cycle (i.e., requesting to advance multiple steps). Accelerations must clearly document exceptional achievement in at least one of the academic review criteria (the driver) and demonstrate greater than normal productivity in all other advancement criteria applicable to rank and step.

Career Equity Review. This review encompasses an academic's complete record from the initial appointment to ensure that rank and/or step is commensurate with the academic's career achievements in the established criteria for the respective academic title series. The career equity review is a mechanism to correct a substantial inequity in rank and step; it is not a salary appeals process. Academic advancement may follow an action taken to correct an inequity. Career equity reviews are not reviewed by the PRC but instead are referred to an ad hoc review committee, which provides a written recommendation to the Associate Vice President. Please contact Academic Human Resources or review the *ANR Career Equity Review (CER) Process* for more information.

Other Advancement Actions and Reviews

Term Review for Definite Term Appointments. Most academics with definite-term appointments must prepare a merit or promotion dossier when seeking reappointment. Both options may involve a merit or promotion advancement action concurrent with a term

review. A successful advancement action results in a new term end date; a negative advancement action carries the possibility of non-reappointment.

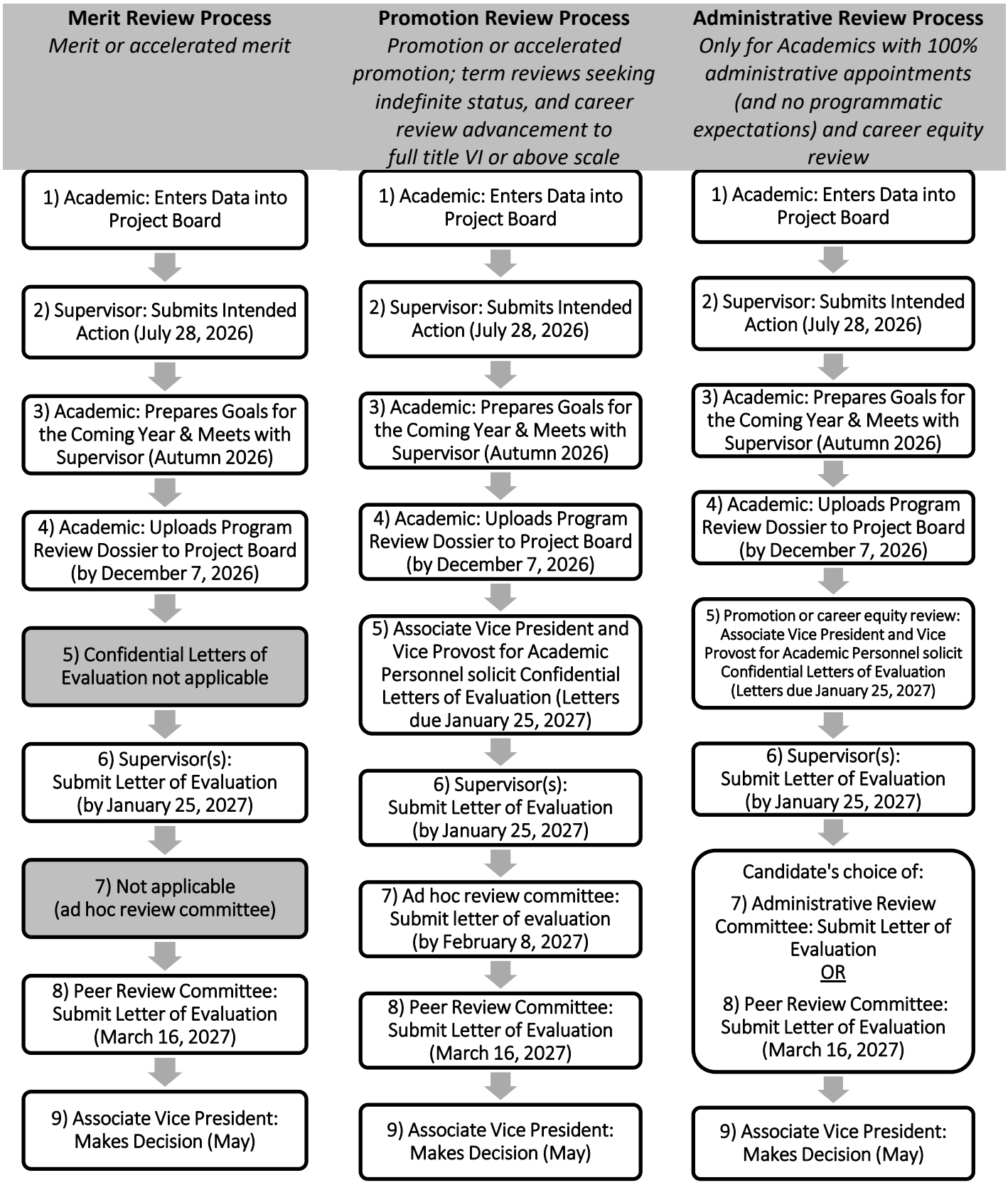
First Term Academics (18/30 month option). First term academics may submit advancement under the 18/30 month option to advance to a second term; see guidelines in section two. First-term academics may not submit an acceleration request as their first action. First-term actions should be merits, since promotion requests as first-term actions lack evidence of trajectory and sustained success; hence, first term promotions will not be approved unless there are special circumstances (e.g., if no step increase is feasible).

Academics seeking indefinite status. Academics with definite term appointments who are seeking indefinite status should prepare a merit or promotion dossier that covers all of their time in the position since the date of hire.

Administrative review. Academics with 100% administrative assignments and no academic (programmatic) responsibilities documented and approved in the position description are eligible for an administrative review process. The primary distinction is that for these cases, the Associate Vice President will determine if a review is conducted by an ad hoc review committee or by the PRC. Examples of positions include Vice Provosts, some Academic Administrators, and other academics who have a 100% administrative appointment with no academic (research or extension) responsibilities. Confidential letters of evaluation are only required for promotion, accelerated promotion, or career review cases.

Review Processes

The review process for PRs involves multiple stages of preparation and evaluation. See the three (3) figures on the next page. Refer to the Academic Human Resources website for a complete list of dates, deadlines, and training.


Merit Review Process
Merit or accelerated merit
1) Academic: Enters Data into Project Board
2) Supervisor: Submits Intended Action (July 28, 2026)
3) Academic: Prepares Goals for the Coming Year & Meets with Supervisor (Autumn 2026)
4) Academic: Uploads Program Review Dossier to Project Board (by December 7, 2026)
5) Confidential Letters of Evaluation not applicable
6) Supervisor(s): Submit Letter of Evaluation (by January 25, 2027)
7) Not applicable (ad hoc review committee)
8) Peer Review Committee: Submit Letter of Evaluation (March 16, 2027)
9) Associate Vice President: Makes Decision (May)
Promotion Review Process
Promotion or accelerated promotion; term reviews seeking indefinite status, and career review advancement to full title VI or above scale
1) Academic: Enters Data into Project Board
2) Supervisor: Submits Intended Action (July 28, 2026)
3) Academic: Prepares Goals for the Coming Year & Meets with Supervisor (Autumn 2026)
4) Academic: Uploads Program Review Dossier to Project Board (by December 7, 2026)
5) Associate Vice President and Vice Provost for Academic Personnel solicit Confidential Letters of Evaluation (Letters due January 25, 2027)
6) Supervisor(s): Submit Letter of Evaluation (by January 25, 2027)
7) Ad hoc review committee: Submit letter of evaluation (by February 8, 2027)
8) Peer Review Committee: Submit Letter of Evaluation (March 16, 2027)
9) Associate Vice President: Makes Decision (May)
Administrative Review Process
Only for Academics with 100% administrative appointments (and no programmatic expectations) and career equity review
1) Academic: Enters Data into Project Board
2) Supervisor: Submits Intended Action (July 28, 2026)
3) Academic: Prepares Goals for the Coming Year & Meets with Supervisor (Autumn 2026)
4) Academic: Uploads Program Review Dossier to Project Board (by December 7, 2026)
5) Promotion or career equity review: Associate Vice President and Vice Provost for Academic Personnel solicit Confidential Letters of Evaluation (Letters due January 25, 2027)
6) Supervisor(s): Submit Letter of Evaluation (by January 25, 2027)
Candidate's choice of:
7) Administrative Review Committee: Submit Letter of Evaluation
OR
8) Peer Review Committee: Submit Letter of Evaluation (March 16, 2027)
9) Associate Vice President: Makes Decision (May)

Step 1: Academic Enters Data into ANR Project Board

Project Board is UC ANR's online system that integrates academic program review, civil rights compliance, and organizational reporting requirements. All academics must input data into Project Board by December 7, 2026. Academics should be entering data continuously throughout the year. Data may be subsequently downloaded into a Microsoft Excel or Word document and used to assemble the PR. If using the download feature, academics should check the supporting documentation tables and edit them as needed. Civil Rights Compliance is integrated with Extension Activity reporting in Project Board. Refer to "Project Board – Civil Rights Compliance Instructions". Also note that all youth programming activities (including number of participants and demographic data) need to be reported via the 4-H Youth Development Statewide Program.

Step 2: Primary Supervisor Submits Intended Actions by July 28, 2026

The primary supervisor confirms with the academics they supervise the intended actions (e.g., advancement type, annual evaluation, or intent to retire) and submits to Academic Human Resources. They should also consult with additional supervisors, if applicable.

Step 3: Academic Prepares their Goals for the Coming Year and Submits to Supervisor

Academic and Supervisor Meet to Discuss Goals. It is recommended that this discussion occur between July and September 2026.

Step 4: Academic Submits their Program Review Dossier by December 7, 2026

Academics prepare a PR within the guidelines provided in section three of these guidelines. To submit the dossier, academics upload digital files via Project Board. Submitting a complete dossier in compliance with established guidelines, requirements, and pagination is the responsibility of the academic. An incomplete dossier that lacks documented evidence of the academic's performance relative to the advancement criteria poses challenges for the PRC evaluating the dossier. All documents need to be uploaded in PDF format. Submission or changes of/to PR dossiers after the submission deadline are only granted in exceptional circumstances with approval of the Vice Provost of Academic Personnel.

Step 5 (if applicable): Associate Vice President and Vice Provost for Academic Personnel solicit Confidential Letters of Evaluation

For promotions, accelerated promotions, term reviews seeking indefinite status, career review advancements to full title VI or above scale (beyond Step IX), administrative reviews, career equity reviews, as well as cases by request of the candidate, supervisor, Vice Provosts, or Associate Vice President. Letters of evaluation are objective appraisals of the efforts, outcomes, and impacts realized by the academic during the review period. The Associate Vice President and Vice Provost for Academic Personnel shall solicit letters of evaluation from qualified persons and from sources inside and outside the University of California. The academic and supervisor may provide names of persons who, in their view, for reasons set forth, might not objectively evaluate the academic's performance.

The types of evaluators may include:

- **Internal UC academic evaluators** (2 letters recommended): Advisors, specialists, other UC ANR academics, and UC faculty who are familiar with aspects of the candidate's work and able to evaluate one or more advancement criteria. Evaluators should be at an equivalent or higher step/rank than that sought by the candidate.
- **External academic evaluators** (2 letters recommended): Academics and faculty from institutes of higher education who are qualified to evaluate the work but have no close connection with the candidate, e.g., they are not a recent mentor, collaborator, or advisor. This assures that external referees do not have a conflict of interest. External evaluators may include UC campus academics with no close connection to the candidate. For promotions or accelerated promotions (assistant to associate or associate to full), external evaluators should represent multi-county, statewide, or regional perspectives. For career review advancement to full title VI or above scale, external evaluators should also represent statewide or national perspectives.
- **External clientele/partner** (1 letter recommended): A key partner, clientele, collaborating agency personnel, or an industry contact able to evaluate one or more advancement criteria.

The letters of evaluation shall be confidential to the fullest extent of UC policy and law. The academic may request a redacted copy of the confidential letters of evaluation. The Vice Provost for Academic Personnel will contact selected evaluators; academics shall not directly contact evaluators.

Process for Soliciting Confidential Letters of Evaluation

1. By October 27, 2026: Academic identifies five names of potential internal, external academic, and external clientele/partner evaluators. Academic provides the names and contact information to Academic Human Resources using the Qualtrics survey link.

2. By October 27, 2026: Supervisor(s) recommends an additional five evaluators via a Qualtrics survey. Supervisors may seek input from Area/County Directors, Program Teams, and Statewide Programs, as needed, on appropriate evaluators for the academic year. Supervisor provides the names and contact information to Academic Human Resources using the Qualtrics survey link.

3. By November 16, 2026: The Associate Vice President and Vice Provost for Academic Personnel will review the names of evaluators submitted for each academic and provide a confidential list to Academic Human Resources. The goal is to obtain a minimum of four letters of evaluation per academic. Some evaluators recommended by the academic and the supervisor may not be contacted. The Associate Vice President and Vice Provost may identify additional subject matter evaluators to help ensure a fair and objective evaluation.

4. By December 8, 2026: Academic Human Resources will coordinate with VPAP's office to send an email request to selected evaluators with the academic's PR packet and supporting documentation.

5. By January 25, 2027: Evaluators must send their letters of evaluation to Academic Human Resources as described in the initial request by the Associate Vice President and Vice Provost for Academic Personnel. Academic Human Resources will upload all letters received for each academic to their case files.

Step 6: Supervisor(s) Provide Letter of Evaluation (required) due by January 26, 2026
The academic's primary supervisor (typically an Area/County Director, Research and Extension Director, Statewide Program Director, and/or Vice Provost) reviews the candidate's PR and writes a letter of evaluation. County-based academics with a statewide program affiliation (e.g., Integrated Pest Management; Community Nutrition and Health; 4-H Youth Development, Fire Network) have a secondary supervisor who also reviews the candidate's PR and writes an additional letter of evaluation. These help to ensure alignment between the statewide goals and integration of local programming.

Additional supervisors may be assigned for cross-county or SWP/I appointments (as "read-only supervisors"), such as Area/County Directors, Research and Extension Center Directors, or SWP/I Directors; they shall provide feedback to the evaluation letter from the primary supervisor. Letters are made visible to the candidate once the advancement decision is made.

Step 7 (if applicable): Ad Hoc Review Committee's Evaluation due by February 8, 2027
For promotions, accelerated promotions, term reviews seeking indefinite status, career review advancements to full title VI or above scale, administrative reviews, career equity reviews, multiple step acceleration requests, as well as cases by request of the candidate, supervisor, Vice Provosts, or Associate Vice President (must be approved by the Associate Vice President).
Ad hoc review committees evaluate an academic's performance and achievement as documented in their PR, make a recommendation, and provide a written assessment to the PRC and Associate Vice President. Ad hoc review committees are composed of academics appointed by the Associate Vice President with the advice of the Academic Assembly Personnel Committee. The Academic Assembly Personnel Committee reviews letters of negative and mixed recommendations to ensure accuracy and the use of mentoring language. The written assessment and the ad hoc review committee's advisory recommendation tally are made visible to the candidate once the advancement decision is made.

Step 8: Peer Review Committee's Evaluation (March 1-5, 2027)
The UC ANR PRC is charged by the Associate Vice President to advise on academic requests for term reviews, merits, promotions, and accelerations. The PRC is composed of academics within UC ANR, appointed by the Associate Vice President and serving at the request of the Associate Vice President for three years with overlapping terms. The composition of the PRC strives to reflect the breadth of UC ANR's programmatic areas and administrative assignments. Note that the Associate Vice President has the sole authority to grant merits, promotions, and term appointments. Each PRC member makes a recommendation, and the detailed tally is provided with the assessment of performance, accomplishment, and opportunities to the Associate Vice President. The Academic Assembly Personnel Committee reviews letters of negative recommendations to ensure the accuracy and inclusion of mentoring language. The written

assessment and PRC's advisory recommendation tally are made visible to the candidate once the advancement decision is made.

Step 9: Associate Vice President's Decision on Advancement (May 2027)
The Associate Vice President reviews all PRs, letters of evaluation from clientele/colleagues and supervisors, PRC advisory recommendations and comments, ad hoc review committee advisory recommendations and comments (if applicable), and decides on the request for advancement. The decision-making process may expand beyond the submitted PR and involve previous evaluations, performance improvement plans, and other personnel actions or issues. The Associate Vice President's decision and comments are made visible to the candidate.

Possible Step 10: Appeal of Negative Advancement Decision
The academic may file an appeal with the Academic Human Resources office within thirty calendar days from the notification date of the denial of the salary action. If an appeal is filed, the Academic Human Resources office forwards the request to the Vice President for review. The appeal must be in writing, must state the basis for the appeal, and must be received by the Vice President within thirty calendar days of the Associate Vice President's decision. The Vice President may refer the dossier to an ad hoc appeal committee to assess the merits of the appeal and write a letter of evaluation. The Vice President makes the final decision on the appeal.

SECTION 2: Actions Outside the Normal Progression

A. Accelerations
Accelerated advancement is a form of progression that recognizes academics who perform at an exceptional level during the review period. An acceleration is a request by the academic to advance when evidence of achievement and/or impact is sufficient to request an advancement ahead of the normal merit cycle. Accelerations are either a merit or promotion action. There is no limit to the number of accelerations an academic may receive within a level/rank or in consecutive cycles; however, consecutive accelerations are rare. First-term academics may not request an acceleration. Academics need to discuss their request for an acceleration with their supervisor(s).

Expectations for Accelerated Advancement
Accelerations require exceptional achievement in one of the academic review criteria of the title (the driver) as well as greater than normal productivity in all the areas of review, consistent with the academic's position description and rank/step. Academics may want to select only one driver so that the requirements for "exceptional" only apply to one driver (e.g., Applied Research and Creative Activity OR Extension of Knowledge); however, multiple drivers are possible. The greater the requested action diverges from the normal progression, the greater the impact and productivity expected. Please note that in formulating criteria for accelerations, a balance was sought between concreteness and flexibility, and thus, there are no quantitative metrics.

Types of Accelerations

- *Off-Cycle Acceleration*: a request by the academic to advance a step before their normal review cycle (request to advance at least one year before their normal cycle). An academic who received a negative/denied decision for their acceleration request may submit for advancement during their regular on-cycle advancement. Examples: (a) accelerated merit advancing from associate step 1 to associate step 2 in one year; or (b) accelerated promotion advancing from associate step 5 to full title step 3 in two years.
- *On-Cycle Acceleration*: request by the academic to advance two or more steps during their normal review cycle. An academic who received a negative/denied decision for their acceleration request is still eligible for their normal on-cycle advancement. Examples: (a) accelerated merit advancing from academic coordinator II step 2 to step 4 in two years; or (b) accelerated promotion advancing from assistant step 5 to associate step 3 in two years. Such multiple-step acceleration requests (e.g., (a) and (b)) are subject to ad hoc review committee evaluations.

B. First-Term Academic Advancement: *Minimum 18/30 Month Option*

Before seeking an advancement, first-term academics usually complete at least two years for those in a two-year term cycle or three years for those in a three-year term cycle. 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 or after at least thirty (30) full months for those in a three-year term cycle. New academics are encouraged to discuss whether they should seek the 18/30 month option with their supervisor. The 18/30 month option is a regular merit or promotion action, not an acceleration, and therefore, the requirements and criteria for an acceleration do not apply. However, the academic must show the equivalent of 24 (or 36) months of performance in the reduced review period. The equivalency of performance to the normative review period must be made clear in an introductory paragraph in the dossier. The 18/30 month option may be a merit or promotion (unusual) action concurrent with a term review. If successful, the result is a new term end date. *If unsuccessful, one potential outcome is that the academic is not reappointed*. Advancement will depend on achieving outcomes and having anticipated impacts that meet the advancement criteria at the requested rank and step. An academic may consider not availing themselves of the 18/30 month option and consider advancing once they have completed 24 (or 36) months of performance.

C. Advancement Deferrals

Per university policy, all academics shall be reviewed at least every five years.

An approved deferral postpones the review of an advancement action for one year. All requests to defer an advancement require approval by the Associate Vice President. Such requests are to be submitted in writing to the supervisor and the Academic Human Resources office by **October 27, 2026 (early submission is strongly encouraged)**. Academic Human Resources will forward requests to the Associate Vice President, who will consult with the supervisor before making a decision. Common reasons for deferrals may include (but are not limited to) deferred promotion when an academic starts at a high step in Assistant rank and may not be ready for

promotion to Associate rank, or deferral of merit when previously promoted to a high step in Associate or Full titles. Academics who are approved to defer an advancement must submit an annual evaluation.

Academics with term appointments, including those who have not yet earned indefinite status, are not eligible to defer advancement that coincides with a term review unless there are extenuating circumstances. Requests will be reviewed on a case-by-case basis and approved by the Associate Vice President.

Academic Administrators must be reviewed at least once every four years, and a PR is required for this review. On a case-by-case basis, the Associate Vice President may approve a deferral and extend a term appointment for academics in this title.

Academic Coordinators have term appointments and are not eligible to defer advancement that coincides with a term review. However, certain extenuating circumstances may warrant the approval of a deferral and an appointment extension by the Associate Vice President. These situations will be evaluated upon receiving a written request.

Professional Researcher, Project Scientist, Specialist (non-Cooperative Extension), Specialist in Cooperative Extension, and Cooperative Extension Advisor in full title V or above are not required to seek a merit advancement or promotion. However, in the absence of a merit or promotion review, academics in the title series named above who are at full title V and above must be reviewed at least once every five years, and a PR is required for the review. The review period initiates at the last approved salary action for a merit or for the entire time in the full title rank for a promotion. A comprehensive five-year evaluation of the performance for academics in the title series named above, at full title V and above, occurs to ensure the appointee meets the expectations for their rank and step.

D. Reviews Following an Unsuccessful On-Time Advancement

If the review for advancement is unsuccessful, it is expected that an advancement will be sought after one full normal cycle. A “normal cycle” is defined as the normal period of service at a particular step within the assistant, associate, or full-title rank, which could be a two- or three-year period. Seeking an advancement before the end of one full normal cycle does not constitute an acceleration. The review period of the next advancement action will initiate from the last approved salary action. This is to allow an academic to report all accomplishments since the last successful review action, covering several years in the PR case. Academics may be required to develop a Performance Improvement Plan (PIP) if directed by the Associate Vice President after an unsuccessful performance review (which may include reviews involving merit, promotion, term, or a five-year comprehensive evaluation). The Associate Vice President may also direct the type and timing of the next advancement action.

Note, in accordance with the PIP Guidelines, a Performance Improvement Plan (PIP) is to document performance issues and areas of concern along with goals and expectations that an academic needs to achieve in order to progress towards expectations. A corrective action or

dismissal may be instituted if there are two consecutive negative evaluations (reference PPM 336, Annual Evaluations).

Upon the completion of one full normal cycle since an unsuccessful advancement, the appointee may opt to submit a request to defer. As a reminder, an approved deferral delays the review of an advancement action for one year and must be approved by the Associate Vice President. No more than two consecutive deferrals will be approved. Additionally, if an academic has two consecutive negative reviews, the Non-Senate Academic Appointees/Corrective Action and Dismissal procedure may be implemented and may serve as justification for denying a deferral request.

E. Academics with Restrictions on Advancement Criteria

Academics with restrictions on advancement criteria include: (a) grant-funded (or alternative-funded) academics with no salary component to support one or more advancement criteria; (b) partially grant-funded academics with a limited UC ANR-funded salary component to support normal advancement criteria; or (c) a multi-year detail assignment with no expectation of, nor time for, research during the review period.

- *Position description.* The position description should indicate the percent effort for each advancement criterion, noting limitations to advancement criteria. Total adjusted full-time equivalent percentages must still equal their total full-time equivalent (e.g., a full-time academic's adjusted percentages must equal 100%). It is the responsibility of the academic to review position descriptions periodically and update them to reflect changes in responsibilities and/or restrictions. Academics with restrictions on advancement criteria who seek a merit or promotion provide a statement of responsibilities and effort as a percent of full-time equivalent devoted to these responsibilities. The average time reported over the course of the review period is in the introductory program summary narrative. Additionally, the position description is updated and signed reflecting changes in responsibilities. For academics with appointments less than 100% full-time equivalent total, clarification in the program summary narrative should specify the percent of the appointment and the responsibilities/expectations in all criteria during the period of review. The determination may change as assignments change.
- *Program review dossier*: Academics should develop a statement of special circumstances, in consultation with their supervisor, to include in their PR program summary narrative. This statement of special circumstances verifies and confirms the allocation of effort for the review period found in the academic's position description.
- *Evaluation of academics with restrictions on advancement criteria:* Scholarly activity is expected to continue at a proportionate level that would allow for normal progression in the academic's title series, taking into consideration reduced full-time equivalent or restrictions on normal advancement criteria. The PRC will make every effort to evaluate with flexibility while applying standards equitably consistent with University standards of excellence. Note that for a temporary reduction in percentage of time, the normal period of review may be extended by mutual agreement to allow for scholarly productivity to meet normal expectations.

F. Academics with Administrative Appointments

Academics with an administrative appointment have a percentage of effort dedicated to academic responsibilities and administrative responsibilities. Expectations for scholarly activity in normal advancement criteria continue proportionately to the reduced full-time equivalent of required expectations for normal progression in the academic's title series. Academics document adjusted full-time equivalent percentages for each advancement criterion and their administrative appointment in their position description. The most common roles with administrative responsibilities include County Director, Research and Extension Center Director, Statewide Program or Institute Director, etc. Academics with administrative appointments are also required to document successes in the four administrative review criteria below:

- *Position description*: The position description should include percent of effort for administrative responsibilities established by considering time commitment and responsibilities as determined and agreed upon by their supervisor and their supervisor's supervisor. It is the responsibility of academics to review their position descriptions periodically and update them to reflect changes in responsibilities.
- *Program review dossier*: Academics should develop, in consultation with their supervisor, a statement of special circumstances to include in their program summary narrative. This statement of special circumstances verifies and confirms the allocation of effort in the academic's position description for the review period.
- *Evaluation of academics with administrative appointments:* Academics with a 100% administrative appointment with no expectation for research or extension (programmatic/academic) performance, documented and approved in the position description, may be eligible for the administrative review process. Academics with less than 100% administrative assignments follow normal advancement procedures. The PRC will make every effort to ensure an academic with a similar administrative assignment reviews the candidate's PR. The PRC will ensure flexibility while applying standards equitably consistent with University standards of excellence. The PR should convey academic and administrative performance and accomplishments in proportion to the assignment.
- *Minimal expectations for administrative appointments include:* The ad hoc review committee will review the academic's efforts and accomplishments in the following criteria:
    - *Administration of Program*: Leadership to academics and staff to ensure assessment of clientele needs, priority program goals are developed, programs are implemented, and outcomes and impacts are measured and communicated. Compliance with all policies and procedures related to the program(s).
    - *Leadership*: Demonstrated ability to share a vision, inspire, and motivate others; ability to encourage and openly explore new ideas and innovative changes, and foster positive transformations. Provide evidence of ongoing support to researchers and educators in conducting quality research and extension programs. Demonstrate effective management of personnel, including oversight, annual evaluations, merits, and promotions; and show investment in improving staff expertise and support professional development.

- *Budget*: Clearly demonstrate evidence of successfully securing resources, effectively allocating resources, monitoring the use of resources, and reporting to funding agencies.
- *Partnerships and Relationships*: Provide evidence for cultivating, maintaining, and nurturing internal UC, political, and industry relationships.

Contributions to increase equitable opportunities for participation in your program and foster UC ANR's Principles of Community need to be incorporated into the PR.

G. Academics on Part-time Appointments and with a Leave of Absence during the Review Period

When an academic appointee is considering a part-time appointment, or a voluntary temporary reduction in the percentage of time of an appointment, the terms of the appointment and the expectations for productivity should be thoroughly discussed at the outset and summarized in the justification memo. Specifically, during the pre-planning stage of a request for a leave of absence, expectations for review and advancement during the leave should be discussed with Academic HR and set forth in detail in the justification memo prior to approval. If the leave of absence is related to Family Medical Leave (FML), this should also be discussed in collaboration with the Employee and Labor Relations Office and Academic HR as part of any accommodation agreements, when feasible.

The university is committed to ensuring that family needs are accommodated in a fair and flexible manner, and every effort should be made to provide flexibility and to apply standards with equity for academics, consistent with University standards of excellence. Advancement of a part-time appointee shall depend on quality of performance at a level of distinction comparable to that demanded of a full-time appointee, although, when circumstances warrant, at a lesser rate of scholarly accomplishment (i.e., prorated).

Teaching and service expectations for part-time appointees and reduction in percentage of time to accommodate family needs shall be pro-rated in accordance with the percentage of time of the appointment. It may be possible that scholarly productivity can be prorated also, as long as the quality and impact of the work are commensurate with that of full-time appointees. Alternatively, an extended time frame for review will be acceptable. There is an understanding that reviews for promotion may need to be delayed to allow for scholarly productivity commensurate with academic standards for promotion in the field.

Academics that are interested in accommodation to postpone their promotion review case or a temporary reduction in the appointment percentage due to family needs and/or the care of a child or children in accordance with systemwide policy are encouraged to contact the Academic HR and Employee & Labor Relations Offices.

SECTION 3: Elements of the Program Review Dossier

The following instructions provide guidelines on how to prepare the PR using a format that focuses on program themes. These instructions are guidelines, and the academic may format their dossier to best summarize their performance in applicable advancement criteria.

I. Position Description (required)

II. Cover Page (required)
Complete the cover page and include it as the top page in your PR.

III. Acceleration Statement (if applicable)
If applicable, include an acceleration statement if seeking an acceleration.

IV. Program Summary Narrative (required)
The program summary narrative summarizes the academic's performance and achievement to meet applicable advancement criteria aligned with their rank/step and position description. Narrative length is not to exceed five pages for merit actions and eight pages for promotion actions (plus one additional page for academics with academic and administrative appointments). Activities reported in the program summary narrative are under programmatic themes. The candidate should articulate clearly how each theme focuses on one or more ANR Condition Changes; if applicable, include a statement of special circumstances or statement of responsibilities and effort for those with restrictions on advancement criteria or administrative responsibilities.

V. Supporting Documentation (required)
Include documentation to support the program summary narrative meeting the applicable advancement criteria aligned with the academic's rank/step and position description. Academics will ultimately decide to share their activities in a format that best supports their program summary narrative, which may be the traditional table format or an alternate format. An optional section is a one-page summary of three publication examples.

VI. Sabbatical Leave Plan and/or Report (if applicable)
Upload plans and reports for sabbatical leaves completed during the review period. The report shall become a part of the supporting materials submitted with any proposal for subsequent promotion or merit increase (APM-740) and contribute to the evaluation of academic advancement requests when the review period includes the period of sabbatical leave.

VII. Work Plan (if applicable)
A work plan, recommended for all academics with less than one full-time equivalent, describes how the academic will meet advancement criteria at that percent time for their title series. Plans should be included with applicable annual evaluations and academic advancements. Information on plans and a template may be found on the Human Resources website.

VIII. Goals and Objectives for the Coming Year: October 1, 2026 - September 30, 2027
Optional to include in the dossier. Use the template found on the Human Resources website.

Required Program Review Dossier Sections by Requested Advancement Type

2025 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	• 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 in full title VI-IX • Career Equity Review: Period since date of hire**	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	• Program Summary Narrative (required, 5-page maximum) • Statement of Special Circumstances (if applicable, for those with restrictions on advancement criteria. See Section 2E.)	• Program Summary Narrative (required, 8-page maximum) • Statement of Special Circumstances (if applicable, for those with restrictions on advancement criteria. See Section 2E.)	• Program Summary Narrative (required, 8-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 or Coordination of Academic Programs.	Professional competence, service, project summary, and Extension activities or Coordination of Academic Programs.	Professional competence, service, project summary, and Extension activities or Coordination of Academic Programs.
Publications (Bibliography)	Required in supporting documentation (unless not applicable per title). Letters of	Required in supporting documentation (unless not applicable per title). Letters of	Required in supporting documentation (unless not applicable per title). Letters of

	acceptance required for in-press papers	acceptance required for in-press papers	acceptance required for in-press papers
Summary of publication examples (3 examples, 1-page maximum, hyperlink to publications)	Optional in supporting documentation	Optional 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

* Multiple-step acceleration requests include an ad hoc review committee review.

** The Peer review committee does not evaluate career equity reviews. An ad hoc committee is typically assembled to review and provide a written recommendation to the Associate Vice President. See page 6.

*** Different academic titles have different advancement review criteria (see section 4). It is recommended to adjust the supporting documentation and supporting documentation tables to reflect the respective review criteria.

Tips for Preparing a Program Review Dossier

Audience: Candidates should write a concise and comprehensive PR that explains their program, shares their outcomes and impacts, and is informative for the audience:

1. Associate Vice President
2. PRC
3. Supervisor(s) (typically a County or Area Director, Research and Extension Center Director, a Principal Investigator, and/or Statewide Program/Institute Director)
4. Ad hoc review committee (if applicable)

Style: Prepare the dossier using an easy-to-read font with single-spaced text; best for accessibility are sans-serif fonts such as Arial, Calibri, Helvetica, Tahoma, or Verdana. Use a style handbook appropriate for the discipline as a guide for all grammatical, punctuation, and bibliographic citations (e.g., Publication Manual of the American Psychological Association, MLA Handbook for Writers of Research Papers, The Chicago Manual of Style). Check the dossier for duplications and omissions. Paginate for easy reference. Use font size no smaller than 11 pts.

Avoid acronyms. If acronyms are used, be certain to define them in the text.

Voice: Academics may use active or passive voice, and are encouraged to use first-person wherever appropriate in describing their own activities.

Compiling Information: Before beginning, compile pertinent information. The best and most efficient way of collecting information is to enter activities on a regular ongoing basis in Project Board and to enter publications on a regular ongoing basis in the ANR Online Bibliography. If not entering information on a regular basis, develop a system of keeping track of these activities for a later entry. Academics may seek guidance from their supervisor and colleagues on how to develop an organized system of tracking activities.

Reporting period: Do not provide information from previous review periods unless it is relevant for documentation that led to successes during your current review (e.g., outcomes and impacts achieved or measured during the current review period based on methods deployed in a previous review period). Do not provide information in supporting documentation tables from previous review periods if they do not contribute to the current review (e.g., don't add career-spanning CVs or documentation tables and highlight achievements that fall in the current period).

AI tools: The use of generative AI tools to write Program Review Dossiers is not permitted. Any use of AI tools within UC ANR must follow UC guidance on Responsible Artificial Intelligence and UC ANR internal guidelines.

I. Position Description

It is the academic's responsibility to keep their Position Description up to date when there is a change in program direction, responsibilities, and/or reporting relationships, and to make sure that the approved/signed position description(s) for the period of review are added to their dossier. Position descriptions require the signature and date of the academic, their immediate supervisor, their supervisor's supervisor, and the Statewide Program Director (if applicable). Position Descriptions should be adjusted as the position evolves (recommended at least every five years).

The position description must include the academic's name, title of position, effective date, county (or counties), purpose, clientele group(s), major academic program responsibilities, program leadership or administrative responsibilities (if applicable), affirmative action, relationships, and qualifications. The academic position description template and instructions to complete a position description are available on the Human Resources website. Use an addendum to document special short-term assignments that do not warrant a revised position description, such as Acting County Director or temporary cross-county assignments.

II. Academic Program Review Dossier Cover Page

Use the template for the Academic Program Review Dossier Cover Page.

III. Acceleration Statement (if applicable)

There should be clear documentation of exceptional achievement **in at least one** of the academic criteria (see section 4 for title-specific advancement criteria). **Clearly define the "driver" for your acceleration request.** Productivity and progress in **all advancement criteria** *(as applicable for your series)* for advancement must be greater than would normally be expected for the individual's rank and step. An acceleration statement should cover *only the period since the last successful action.* For example, in seeking promotion to Associate I, you would not include in your acceleration statement your total career in the assistant rank. Instead, you would cover only the period since the last successful action. The acceleration statement is not to exceed one page.

IV. Program Summary Narrative (Required)

The program summary narrative describes the academic's program to provide evidence on how the academic met the applicable advancement criteria aligned with their academic title, rank/step, and position description. Narrative length for merit actions is not to exceed five pages, and for promotion actions is not to exceed eight pages. For academics in a term review seeking indefinite status, regardless of whether the action is a merit or promotion, the narrative page limit is eight pages. Academics with academic and administrative appointments can add one additional page to dossiers.

The narrative should address the academic's accomplishments in the academic's review criteria related to their academic title (see section 4), including as applicable:

- *Performance in applied research and creative activity*: The academic has demonstrated outcomes and achievement in applied research and creative activity, aligned with position description and clientele needs. Completed assessment of clientele needs may enhance performance.
- *Performance in extending knowledge and information*: The academic implemented and demonstrated outcomes from a range of Extension activities to address local needs (e.g., workshops, seminars, field days, short courses, newsletters, lay publications).
- *Coordination of Academic Programs:* Types of activities include: (i) academic program planning and development; (ii) assessment of program and constituency needs; (iii) evaluation of academic program activities and functions; (iv) development of proposals for extramural funding of campus programs and identification of support resources; (v) liaison representation with other agencies and institutions in the public and private sectors; and (vi) supervision and leadership of other academic appointees or staff.
- *Professional competence*: The academic has presented at local or regional meetings of professionals, service providers, or other industry partners.
- *University and public service*: The academic shows activity in service roles at the local level, including the Division, the University and public service.

Although not a separate category, contributions to increase equitable opportunities for participation in your program and foster UC ANR's Principles of Community should be incorporated where appropriate in the PR.
Information entered into ANR Project Board under Themes: background/clientele/goals/inputs and methods/outcomes/impacts may be exported into a Microsoft Word document and used to write the program summary narrative.

Recommended Components for the Program Summary Narrative

Introduction (Statement of Assignment)
Share your title and rank, full-time equivalent time, and the rank/step you are seeking. State your thematic program areas (i.e., your focus; what you are doing to address clientele needs) with reference to UC ANR's public value framework with 31 condition changes. State important program areas and the need for your research and extension program, i.e., help people see why this work is important. State the changes sought through your work and the types of change desired (primary condition changes).

Statements of Special Circumstances or Challenges (if applicable)
With the changes to the availability of grants and contracts at the federal level, academics have expressed concerns about these impacts on the academic advancement review process. Academics whose programs have experienced adverse impacts to research, extension, or program coordination and administration as a result of changes in federal funding opportunities may include a short Statement of Challenges about potentially adverse impacts on research and other university work, such as termination of contract and grant funding or in-kind support, loss

of federal collaborators, infrastructure access, or similar. The intent is to provide academics with the opportunity to share with colleagues, reviewers, and supervisors how the funding environment has impacted programming during the review period, particularly regarding research, scholarship, extension, and university and public service.

Academics with restrictions on advancement criteria or with significant administrative responsibilities may include a statement describing their situation.

- Provide a statement of responsibilities and average effort, as a percent of full-time equivalent, devoted to those responsibilities over the course of the review period.
- Describe responsibility categories: Extension, research, professional competency, service (both university and public), administrative leadership, and define others as appropriate per the specific position title and assignment.
- Document agreement with direct supervisor and their supervisor – two signatures required.

Academics who have taken family or medical leave during the review period may choose to briefly mention this in their narrative but are not required to do so.

Themes (typically one to three themes)

Academics will normally have one to three themes comprising the bulk of the narrative. For each theme, use representative examples of your work to demonstrate how your program is making a difference to your clientele. Incorporate relevant evidence for your title series advancement criteria, e.g., applied research and creative activity (scholarship), extending knowledge and information (stakeholder engagement and adoption), or coordination of academic programs. Include impact statements referencing your supporting documentation as evidence that your activities are contributing to the impact. Refer to UC ANR Program Planning and Evaluation's webpage on "Writing Impact Statements".

Programmatic theme(s). Themes are the constructs for reporting goals, inputs, methods/outputs (activities and participation), outcomes, and impacts in the program summary narrative. The program summary narrative must convey clear themes, each focused on at least one impact (or anticipated impact). Themes should demonstrate how the academic's program is moving towards achieving impact over time. Emphasize the changes desired (outcomes) and highlight the impacts and conditions changes resulting from your work. Support your claims with references to supporting documents within your dossier. Incorporate relevant evidence of applied research and creative activity, extending knowledge and information, communication, and teamwork.

Consider including the following components when describing your theme:

- Clientele: people or groups of people that a program aims to serve
- Goals: the purpose toward which an activity is directed
- Inputs: what is invested, including faculty, staff, students, infrastructure, federal, state, and private funds, time, and knowledge

- Methods/Outputs (activities and participation): research/creative and extension activities to reach goals. Products created through such activities (meetings, training, extension programs, curricula, webinars, publications, etc.). In the narrative, keep methods short and use Supporting Documentation tables for more information. Methodologies to increase equitable opportunities for participation in your program and foster UC ANR's Principles of Community can be incorporated into programming.
- Outcomes/Impacts: Include quantitative, observational, and/or participatory evaluations to determine outcomes such as the number of people, acres, and other units affected when possible. Outcomes may include changes in:
    - Learning (short-term; awareness, knowledge, attitudes, skills, opinions, aspirations, motivations)
    - Action (medium-term; apply and/or adopt behavior and practices)
    - Policy (medium-term; science-based information applied to decision-making and results from science-to-policy activities)
    - Condition (long-term; social, economic, environmental). Impacts should align with the targeted clientele needs and demonstrate how the academic's program contributes to ANR's public value framework with 31 condition changes. Progress toward achieving impact (or anticipated impacts) is described for each theme. Evidence of impact (or anticipated impact) may be demonstrated through primary and secondary empirical data collected by the academic and/or inferred impact as shown through reasonable inferences from scholarly literature. Evidence of behavior change outcomes can be linked to indicators of potential/anticipated impacts.

Notes:

- Publications, curriculum developed, and number of participants are methods, not outcomes.
- Document outcomes and impacts during the review period. Outcomes and impacts measured and observed during this review period, resulting from activities from past review periods, may also be included.
    - For more how-to information and examples on documenting outcomes and impacts, see: ANR tip sheet: Condition Changes – How Do I Measure Them?
    - Examples of documenting methods, outcomes, and condition changes: Condition Change Outcomes/Impact Story Compilations
    - Link to University of Wisconsin Logic Model
    - ANR's public value framework with 31 condition changes

Administrative or Leadership theme(s)

Administrative themes are primarily for County Directors, Statewide Program Directors, and Research and Extension Center Directors; however, anyone with a significant administrative appointment or responsibilities can include this theme. In this section, follow the four administrative review criteria (administration of program, leadership, budget, partnerships, and relationships).

The program summary narrative should reflect the candidate's time and effort with a proportionate amount of space allocated to both academic and administrative performance and achievement. For example, a 50% academic with a 50% administrative appointment, should have approximately half their narrative describing each component.

Briefly indicate your administrative goals; e.g., build a supportive motivated team; build support (financial and in-kind) and progress made. (Note: administration is not just about filling a position – there should be targeted change associated with the responsibilities). Incorporate relevant evidence of accountability and governance, collaboration and communication, people leadership, inspiring innovation and leading change, resource management and financial budgeting, diversity, client service, health and safety, principles of community, and/or professionalism. Document outcomes and (anticipated) impacts of your administrative achievements. See Section 2: F. "Academics with Administrative Appointments" for a list of criteria that should be included within an administrative theme.

For Academic Administrators: Administrative Experience

For Academic Administrators without a research and extension assignment, this topic will often make up the bulk of the program summary narrative. Highlight your major administrative accomplishments and notable achievements since your last successful salary action and provide evidence of outcomes and/or impacts related to your administrative responsibilities since your last successful salary action. Organize your administrative accomplishments by themes where possible.

For Academic Coordinators only: Coordination of Academic Programs

For Academic Coordinators, this topic will often make up the bulk of the program summary narrative. Highlight your major accomplishments and notable achievements since your last successful salary action and provide evidence of outcomes and/or impacts related to your academic program coordination since your last successful salary action. When possible, report accomplishments under the following activities: (a) academic program planning and development; (b) assessment of program and constituency needs, (c) evaluation of academic program activity and functions; (d) development of proposals for extramural funding of campus programs and identification of support resources; (e) liaison representation with other agencies and institutions in the public and private sectors; (f) supervision and leadership of other academic appointees or staff. Supporting Information tables are required for Academic Coordinators to report these activities. This review criteria applies for those in Academic Coordinator titles only.

Professional competence and activity

Summarize activities and evidence of professional competence and activity since your last successful salary action (a few paragraphs recommended).

University and public service

Highlight your contributions and activities in this area since your last successful salary action (a few paragraphs are recommended). Example activities listed under Supporting Documentation

below. Do NOT report University and Public Service activities in Professional Competence. Note that the role of County Director or Interim Director is not University Service and must be emphasized in the narrative in a separate Administrative section. Public Service must be associated with one's professional expertise or position. Activities of Program Teams should be categorized under Professional Competence or University and Public Service depending on the activities, but not included in both. Mentoring and/or leadership to newer academics that demonstrates support for working on critical needs/projects is an example of University Service.

Civil Rights Compliance and Contributions to UC ANR's Principles of Community

Documentation of Civil Rights Compliance in Extension Activities is a legal requirement of your program reporting and should be addressed in this section. As a recipient of federal funds, UC ANR leadership, academics, and staff members are expected to be trained, knowledgeable, and skilled in implementing equal opportunity requirements in recipient programs. UC ANR requires to collect race, ethnicity, and gender data, and/or agency/organization attendance, to determine how effectively programs are reaching eligible persons and beneficiaries and to monitor compliance with federal laws and regulations. In this section, document efforts to define your clientele group baselines and show evidence of program efforts to reach and serve your defined clientele. Report the efforts you have made to increase equitable opportunities for participation in your program and implement equal opportunity requirements in recipient programs. Document additional contributions and activities that support ANR's Principles of Community in personnel or programmatic activities and develop an environment that maximizes the potential of all participants and employees, e.g., by striving to create an environment where everyone thrives and through openness, mutual respect, and investment in all members. Such efforts are best described throughout your dossier and not only in this section.

Additional information on Civil Rights Compliance requirements and information on annual Project Reporting training is available through UC ANR's Office of Civil Rights.

Closing summary

Finally, make a brief statement showing how your program pieces integrate to achieve impact. Summarize your career growth.

V. Supporting Documentation (Required)

Documentation must support the program summary narrative meeting the applicable advancement criteria aligned with the academic's rank/step and position description. 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. However, please refrain from adding detailed narratives, figures, and graphs in supporting information (this is reserved for the narrative section). Whichever method is used should be consistent for the entire supporting documentation section. It is recommended to adjust supporting documentation and supporting

documentation tables to reflect the respective review criteria; e.g., it may not be helpful to add a table with extension activities/events for titles with no extension expectations.

Data entered into ANR Project Board may be downloaded into an editable Microsoft Excel or Microsoft Word file. If complete information was entered into Project Board, this exported file will likely contain much of the information needed to assemble the program review dossier. Review the exported files, and edit as needed (e.g., some default settings will show 0 attendees in exported tables when information is missing, which will need to be corrected in the tables).

A summary of publication examples is optional to include if they support the program summary narrative. Publications themselves should be hyperlinked to the online publication and full text, *NOT* included with the supporting documentation.

The following categories are suggested for supporting documentation, although academics may consider adding, editing, or removing categories to align with the advancement criteria for their title series.

Do not provide information in supporting documentation tables from previous review periods if they don't contribute to the current review; in particular, do not add career-spanning CVs or documentation tables. Do not double-list the same activity twice in separate tables or categories.

A. Project(s) Summary

Applied Research and Creative Activity (for title series with research expectations)
Document your applied research and creative activity projects. Include the title of projects, year of funding and duration, your role (e.g., PI, Co-PI, collaborator), first initial and last name of the collaborator(s), organizational affiliation, and financial or in-kind support you manage. Organize projects by your themes. In their first PR dossier, academics can consider including grants applied but not awarded to demonstrate effort (consider a different section in the table); this should not be done after the initial reviews. All academics can also include projects which do not go through ANR's Grant Tracking System (e.g., if there is no direct funding or in-kind support); please clarify your role on these projects as well (e.g., technical expert, sub-area lead, etc).

Coordination of Academic Programs (for Academic Coordinators)
Document your academic programs and projects. Include the title of projects, year of funding (if applicable) and duration, your role, first initial and last name of collaborator(s) and organizational affiliation, and financial or in-kind support you manage. You may also want to organize projects by your themes.

Administrative Projects (for Academic Administrators)
Document your academic programs and projects. Include the title of projects, year of funding (if applicable) and duration, your role, first initial and last name of collaborator(s) and organizational affiliation, and financial or in-kind support you manage.

A list of current funded contracts and grants is a required element of all PR dossier reviews and will be made available to ad-hoc and PRC reviewers using exports from those listed in UC ANR's Grant Tracking System (GTS). The Office of Grants and Contracts will share a PDF version of this information covering the review period with academics by the end of October for preparation of dossiers and for upload as a separate item of your PR dossier on Project Board. Please verify that your information in GTS is up-to-date, as much as possible. Mark in your Supporting Information Project table(s) if/when the list of funded projects differs from the information available in GTS. This may be due to several reasons, e.g., when projects were authorized prior to the review period or supported by donor accounts or gifts, when GTS information on co-PIs or collaborators is incomplete, or when collaborations were unfunded with no subawards issued to ANR.

B. Professional Competence and Professional Activity

Professional competence includes activities that reflect professional standing within the programmatic area, such as presenting at conferences, holding offices in professional societies, invited presentations, or reviewing/editing publications. State your role in professional competence activities. Professional activity includes participation in training activities to enhance professional development, such as administrative training, professional conferences, or workshops.

Professional Development and Training

List activities undertaken to increase your professional competence. When applicable, provide the date of the activity or training. Include any special leaves you have taken, such as a study leave that included professional development activities. Samples of activities you may include in this section: professional training activities; attendance at conferences, symposia, and workshops. **Do not include required UC training, such as sexual harassment or cybersecurity.**

Disciplinary Society or Professional Association.

List disciplinary societies or professional associations and your activities, leadership, or participation in these societies (e.g., serving as judge, committee member,
Awards received, attendance at conferences. Alternatively, you may place these in Professional Competency (but do not double report).

Evidence of Professional Competence

List activities that reflect your professional standing. Examples of activities: (a) conferences and/ormeetings/training events you organized for professionals or colleagues; (b) membership and/or offices held; (c) liaison to commodity board; (d) professional society presentations; (e) invited presentations given due to professional competence; (f) books or journals edited, articles reviewed or refereed, grant panel membership; (g) webinars developed for statewide and/or nationwide peers; or (h) sabbatical/special leaves.

C. University Service

University service may occur at the local, division, state, national, or international level. Provide activity details, your contribution, and the benefits of these services. Examples of potential University service activities include serving in your local CE unit, on an ANR or university committee, providing leadership to Program Teams, or advocacy efforts. Highlight your leadership activities. Examples of activities: (a) contributions to and/or management of County reports and webpages; (b) advocacy activities; (c) UC committee service related to your appointment or expertise; (d) Program Team, Work Group, or Program Area chair/co-chair; (e) mentoring of other ANR or UC academics and/or staff; or (f) providing subject matter expertise to ANR youth or volunteers (e.g., 4-H volunteers, Master Gardener volunteers; list under Extension Activities if these are you clientele); (g) guest lectures to UC/university students, hosting student field trips. You may list simple membership in a Program Team or Work Group to show engagement, although the service contribution is limited.

D. Public Service

Public service should involve activities and events in which the academic uses their professional expertise to benefit groups or activities outside the University (report direct service to an academic's defined clientele under Extension activities). Highlight your leadership activities and detail the benefits of your activities to the community. Examples may include serving on external boards or councils, participating in community events, leadership of non-University collaborative groups, presentations/support to non-UC students, or serving as a judge for FFA, science fairs, or school job fair. Public service to the community outside of the academic program area should NOT be included (e.g., coaching Little League). Also do not list approved outside professional activities (e.g., paid or unpaid consulting work); by definition, these are outside of your assigned position activities. It is helpful to organize and list activities in subsections of local, county, and statewide, if applicable.

E. Extension Activities or Coordination of Academic Program activities (as applicable)

Extension activities: Document only those extension activities related directly to your program clientele. Organize extension activities by the themes outlined in your narrative when possible. Examples include: (a) meetings organized or co-organized (e.g., classes/short courses/workshops, demonstrations, field days/other); (b) educational presentations at meetings - oral presentations and posters; or (c) other activities: TV and/or radio interviews/programs, newspaper/trade magazine interviews, websites, social media, blogs, collaborations with other agencies, organizations, policy engagement, farm calls and consultations (do not list individually, but summarize). If large numbers of meetings with similar purpose are held and your role remains constant (e.g., teaching the same or similar content, facilitating the agenda, etc.) consolidate them using a collective time frame, title, description, role, general location (usually your county), and a total number in attendance. If you report educational presentations related to your academic program that you did not deliver directly but delivered by your staff or others – please describe your role in these presentations.

Coordination of Academic Programs (only for Academic Coordinators): A table listing activities of Coordination of Programs is a required element of academics in Academic Coordinator titles.

Project Board tables are now available specifically to report Coordination of Academic Programs, which can be exported for PR dossier preparation. Activities meeting this review criteria include(a) academic program planning and development; (b) assessment of program and constituency needs; (c) evaluation of academic program activities and functions; (d) development of proposals for extramural funding of campus programs and identification of support resources; (e) liaison representation with other agencies and institutions in the public and private sectors; and (f) supervision and leadership of other academic appointees or staff. Some of these activities are combined in four default subtables in Project Board, but academics can chose their own table format as needed.

For both Extension and Coordination of Academic Program tables, do not report individual clientele consultations (e.g., individual farm calls, tailgate talks, phone consultations, etc.). Project Board individual clientele consultation records are not exported to the dossier tables. Instead, such activities can be grouped and reported together (e.g., in the extension table category "other"). Do not list meetings with grant collaborators to discuss projects, meetings to get to know collaborators and community partners, or meetings with your staff, supervisor, or mentee.

F. Publications (Bibliography)

Your bibliography should clearly describe peer-reviewed publications and non-peer-reviewed publications in separate sections. Identify publications using the letter designations described below. ***Only list citations from the current review period.*** Identify your academic role on multi-author publications (As an example, see CRediT Taxonomy 2.1 Contributor Roles). Academic appointees are to demonstrate academic growth in all criteria over time. Therefore, peer-reviewed publications become increasingly important as the academic progresses in rank and step. A hyperlink is recommended for publications, directly in your program summary narrative and/or the bibliography. Please ensure the hyperlink is up to date and works properly for the reviewer. Do not use hyperlinks that require passwords. Note that titles without research assignments are not expected to have research publications (if they do, however, they might be listed under Professional Competence); however, there are other bibliographical contributions to meet scholarship requirements applicable for some of these titles, such as evaluation reports, curricula, conference abstracts, technical reports, and others.

Disclose assistance to publications provided by Artificial Intelligence (e.g., ChatGPT or other chatbots) in the bibliography (*Gaggioli A. Ethics: disclose use of AI in scientific manuscripts. Nature. 2023;614(7948):413*).

Peer-Reviewed

- B. Peer-reviewed scholarly journal publications. For the purposes of the PR, "peer-reviewed" means a document reviewed anonymously (aka "blind review") by subject matter experts or scientific panels with the possibility of rejection. Peer-reviewed scholarly journal articles are those published in searchable, peer-reviewed journals and periodicals with articles written by researchers and experts in a specific discipline aimed

at other researchers in a field. Examples: Professional society journals, Journal of Extension Feature or Research Brief articles.

- C. Other peer-reviewed publications. Peer review involves a blind review of materials and a refereed editorial process (with the possibility of rejection) leading to publication. Examples: UC ANR Publications (print or tier 1 video), UC Integrated Pest Management Publications, UC Integrated Pest Management Guidelines, California Agriculture research articles, Journal of Extension Tools of the Trade or Ideas at Work articles, peer-reviewed curricula, books, and monograph chapters. Some conference papers are peer-reviewed (where the key criterion is the possibility of rejection). Most conference papers are not peer-reviewed.

Non-Peer Reviewed

- A. Popular press articles. Articles targeted to clientele and/or laypersons. Examples: Newsletter articles, newspaper articles, UC Delivers, tier 2 videos, trade journals, magazines, web-based articles and extensive/substantial blog posts or podcasts similar in complexity to a newsletter article, non-peer-reviewed curricula for primary clientele, etc.
- D. Technical reports and other non-reviewed articles. Articles targeted to local, state, federal, and other agencies, commodity groups, academics, etc. (not the layperson). Examples: Reports to funding agencies or commodity groups, articles in conference proceedings, workshop/training materials, California Agriculture news and opinion articles, and non-peer-reviewed curricula for a technical audience.
- E. Published abstracts. Abstracts published in a journal or as conference proceedings are limited in terms of the number of words and do not normally include footnotes or a bibliography. Published abstracts may be included in the bibliography.

Letters of Publication Acceptance (if applicable)

Letters of publication acceptance are required for publications listed in the bibliography as "in press" in the current review period. If not in electronic format, scan and upload into the appropriate section. Do not list publications submitted but not accepted.

What does NOT belong in the Bibliography?

Posters do not belong in a bibliography. It is appropriate to list a poster presented at a clientele meeting under other extension activities. A poster presented at a professional society meeting, not for clientele, is appropriate to list under 'professional competence'. PowerPoint slide presentations do not belong in a bibliography. List under extension presentations if for clientele, or if presented at a professional society meeting, then list under 'professional competence'.

Highly recommended practice for bibliographies:

Enter citations into ANR's Online Bibliography software (part of the directory profile) by either (a) manually entering each citation or by (b) using the EndNote XML import process. Use the "Bibliography retrieval" link to download citations into a Microsoft Word document for the ANR Annual Evaluation or Program Review Dossier. It is sorted by publication type and in

chronological order. Format the retrieval as needed and delete publications that are not applicable. Updating your bibliography in ANR's Bibliography software is a requirement of your annual program reporting.

Remember: identify your academic role on multi-author publications and highlight leadership roles on publications. Only list citations from the current review period.

G. Summary of Publication Examples (optional, maximum one page)
Optional for all advancement actions. Cite up to three publication examples with a brief description of each publication, in total up to one page in length. Choose three items of which you are most proud and best represent your program and abilities. ***Hyperlink to the online publication. Do not include the document or text unless the publication is not available online.*** Please ensure the hyperlink is up to date and works properly for the reviewer. The examples may be from any time during your current rank for a promotion request or since the last successful salary action for a merit request. These publications may be articles, books, monographs, digital media, videos, manuals, reports, fact sheets, or others.

VI. Sabbatical Leave Plan and/or Report (if applicable)
Upload plans and reports for sabbatical leaves completed during the review period.

VII. Work Plan (if applicable)
A work plan, recommended for all academics with less than one (1) full-time equivalent, describes how the academic will meet advancement criteria at that percent time, for the rank and title. Plans should be included with applicable annual evaluations and academic advancements. Information on plans and a template may be found on the Human Resources website.

VIII. Goals and Objectives for the Coming Year: October 1, 2026- September 30, 2027
(optional to include in the dossier)

Goals and objectives are not included in the supervisor's evaluation, ad hoc review committee's evaluation, PRC's evaluation, or Associate Vice President's decision. Goals may be included in an academic's dossier as supporting evidence. Use the word template for Goals and Objectives on academic HR's webpage.

SECTION 4: Advancement Criteria

Advancement criteria for title series used in ANR are outlined in the University of California Academic Personnel Manual (APM). The primary criteria are outlined in the table with examples for each title series in the pages that follow.

<table>
<tr>
<td>Professional Researcher (APM 310)
• Research qualifications and accomplishments equivalent to those for the professor series
• Professional competence and activity equivalent to those for the professor series
• University and/or public service (not required in the assistant rank)</td>
<td>Cooperative Extension Advisor (APM 335)
• Performance in extending knowledge and information in disciplines related to the programs of CE
• Performance in applied research and creative activity
• Professional competence and activity.
• University and public service</td>
</tr>
<tr>
<td>Project Scientist (APM 311)
• Demonstrated significant, original, and creative contributions to a research or creative program or project
• Professional competence and activity
• University and public service are encouraged but not required</td>
<td rowspan="4">Academic Coordinator (APM 375)
• Coordinate academic programs: (1) academic program planning and development; (2) assessment of program and constituency needs; (3) evaluation of academic program activity and functions; (4) development of proposals for extramural funding of campus programs and identification of support resources; (5) liaison representation with other agencies and institutions in the public and private sectors; (6) 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)</td>
</tr>
<tr>
<td>Specialist in Cooperative Extension (APM 334)
• Performance in extending knowledge and information
• Research, especially applied research, and creative work
• Professional competence and activity
• University and public service</td>
</tr>
<tr>
<td>Academic Administrator (APM 370)
• Administrative experience
• Professional competence and activity
• University and public service</td>
</tr>
<tr>
<td>Specialist (APM 330)
• Performance in research
• Professional competence and activity
• University and public service (provided these services comply with the candidate's funding source)</td>
</tr>
</table>

Advancement Criteria Clarifications and Definitions

Balance

"Balance" is a concept typically shared as "*progress towards optimizing advancement criteria as the academic progresses in their career*." The concept of balance is not an "equal distribution of weight" or a 25% time commitment between the advancement criteria. Balance is effort in the advancement criteria to allow the academic to progress towards achievement and impact, depending upon one's disciplinary area, position description, clientele needs, and other factors.

ANR recognizes and values opportunities requiring heavier commitments and responsibilities in one advancement criterion against lighter responsibilities in another in realizing achievement and impact.

- *Early Career (e.g., assistant rank):* Academics should initiate efforts in each criterion, but balance is not yet expected. Emphasis is on developing an academic program (i.e., conducting needs assessments, extending knowledge/information, and establishing applied research/creative activities). Some effort should be evident in all criteria. Note that many first-term academics add a specific theme to describe the methodology, results, and outcomes of their needs assessment and how it shapes their evolving academic program.
- *Mid-Career (e.g., associate rank):* Academic's program demonstrates activities towards generating impacts addressing University and clientele needs. Effort across all academic criteria has become evident. Normative emphasis is extending knowledge and information as well as applied research and creative activity. Established relationships exist (with non-University partners, organizations, groups or individuals), creating programmatic resources.
- *Late Career (e.g., full rank):* Program demonstrates impact towards University and clientele needs. Academic demonstrates effort in all academic criteria.

Although Academic Coordinators and Academic Administrators do not have ranks, they are expected to continue to develop in all areas of their advancement criteria over time.

Positive Trajectory of Impact

All academics are expected to have a positive trajectory of productivity and achievement as they advance in their career, demonstrating progress in achieving greater outcomes and impacts over time. A positive trajectory of impact should be demonstrated in every program review dossier for all title series. Additionally, there is an expectation that the academic provides evidence of an accumulation of achievement and impact for promotion advancements (promotion PR includes activities covering all years in rank). ANR values and recognizes that program needs and University priorities change over time, requiring the academic to potentially shift program focus to address emerging needs. Positive trajectory is influenced by the academic's increased competence, deepened relationships with partners/networks, and strengthened organizational/supervisorial resources that afford academic opportunities to support clientele in achieving impacts.

Career Progression

CE Advisors and CE Specialists are hired into term appointments. Expectations in the first three terms vary. 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. For promotions, there is an expectation that academics demonstrate an accumulation of achievements and impacts (or anticipated impacts). Indefinite status (appointment without an end date until terminated by layoff, retirement, demotion, dismissal, or resignation) review for

CE Advisors is generally concurrent with their third program review, and for CE Specialists, concurrent with promotion to Associate rank (ANR Policy and Procedure Manual, Academic Personnel Series). Indefinite status requests require demonstration of a significant potential for a productive career within Cooperative Extension.

The tables below provide **guidance on expectations for different titles and different ranks.** Note that 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.

Local versus statewide/national program responsibilities

For county-based CE academics, it is essential to document activities and impacts of local programming in assigned counties, even when advisors take on statewide responsibilities (e.g., via statewide programs/institutes). Changes in local versus statewide program assignments that go beyond an expected maturation of one's programming (such as increased program delivery and research leadership at the statewide and/or national level at full title CE advisor rank) need to be documented and approved in the Position Description.

Compliance requirements with UC and UC ANR Policy

UC ANR academics are non-Senate academic employees with the University and subject to APM-011 describing Academic Freedom, Protection of Professional Standards, and Responsibilities of Non-Faculty Academic Appointees. UC ANR academics are also entitled to the protections of academic freedom established in APM-010 and obligated by the responsibilities specified in Part II of APM-015, the Faculty Code of Conduct. The Faculty Code of Conduct's intent is to protect academic freedom, to help preserve the highest standards of teaching and scholarship, and to advance the mission of the University as an institution of higher learning. It also lists unacceptable behavior that is subject to University discipline, including, for example, arbitrary denial of access to instruction, discrimination against a student, University employees, or individuals seeking employment, and sexual harassment or violence, among others.

Unacceptable academic behavior includes the violation of canons of intellectual honesty, such as research misconduct and/or intentional misappropriation of the writings, research, and findings of others, and unauthorized use of University resources or facilities on a significant scale for personal, commercial, political, or religious purposes. As stated in the University Policy on Integrity in Research (APM-190), all persons engaged in research at the University are responsible for adhering to the highest standards of intellectual honesty and integrity in research. Research misconduct means the fabrication, falsification, plagiarism, or other practices that seriously deviate from those that are commonly accepted within the scholarly and scientific community for proposing, conducting, or reporting research. Misconduct does not include honest error or honest differences in interpretations or judgments of data.

Academics may be subject to corrective action for misconduct according to procedures found in APM-150 and relevant collective bargaining agreements or Memoranda of Understanding. All ANR employees are also required to be in compliance with mandatory UC ANR trainings and adhere to UC ANR's Administrative Responsibilities Guide, which describes responsibilities in the areas including Conflict of Interest, Contracts and Grants, Gift administration, Financial Services, and Risk and Safety. We also refer to the Office of Contracts and Grants training on Compliance, Intellectual Property, and Internal Policies.

Professional Researcher (assistant to full title V)

	Assistant	Associate	Full Title
Summary	Assistant rank is the entry level for academic appointees. The academic criteria of research and competence need not be equally developed. For advancement in this rank, emphasis must be on the area of Research and Creative Work. Academics are expected to explore innovative ideas and methodology and demonstrate the ability to interact well with colleagues and clientele.	The Associate rank is intended for academic appointees who demonstrate significant potential for a productive career within Cooperative Extension. Academics in this rank must demonstrate an ability to effectively set program priorities, make long-range program planning decisions, interact well with colleagues and clientele, and demonstrate impacts from conducting Research and Creative Activity. The academic program should clearly demonstrate that it is moving toward balance among the three academic criteria for advancement.	Full title rank is reserved for academic appointees who are successfully making positive contributions to their discipline and whose program shows evidence of growth, depth, clientele and colleague respect, professional improvement, and equitable opportunities for participation. Candidates considered for promotion from the associate to full title rank must demonstrate continued professional growth and leadership in their program area. Academics must have an excellent program, incorporating the three advancement criteria, including affirmative action efforts.
Research and Creative Work Independent research equivalent to that required for the Professor series.	▪ Demonstrate ability to assess program needs and priorities. ▪ Evaluate, and/or develop appropriate, innovative methodologies that enhance clientele's knowledge in the program area to the extent possible. ▪ Develop research and/or creative activity in a collaborative and team-oriented atmosphere. Work with other UC academic colleagues to develop (write or edit) relevant publications for local clientele and related industries as appropriate (e.g., newsletter for growers/clientele; news articles, web page for the program, or other innovative methodologies).	▪ Demonstrate the ability to develop a focused research/education program based on evolving clientele needs and the ANR strategic plan. ▪ Collaborate with colleagues and community partners in program development, implementation, and evaluation. ▪ Serve as an author in a variety of publications (e.g., newsletters, articles for the popular press, web-based applications, UC Delivers, and contribute to peer-reviewed publications).	▪ Participate in applied research and/or scholarly activity as evidenced by their presentation and publication record. ▪ Focus program on the research extension continuum (integrate research and education programs where research leads to education while working with a network of colleagues to extend research-based information). ▪ Serve as an author and show leadership in a variety of publications (e.g., UC Delivers, articles for popular press, newsletters, peer-reviewed publications). ▪ Collaborate in acquiring internal and/or external funding for research, extension and/or creative activity.
Professional Competence and Activity Competence in the subject matter appropriate to the discipline is fundamental to individual success, and to the success and progress of UC ANR.	▪ Enhance skills and knowledge in assigned program area(s) and acquire additional skills as needed. (e.g., join a professional society and attend a meeting; complete a short course; work with mentors). ▪ Build credibility with clientele. Seek opportunities to attend and participate in clientele/industry/community sponsored functions and establish a clientele network. ▪ Develop professional relationships that may produce long-term and meaningful University contributions.	▪ Demonstrate growth by improving skills and knowledge. ▪ Participate in professional conferences.	▪ Demonstrate sustained professional growth and contribute to the subject area. ▪ Demonstrate sustained growth in skills and knowledge (e.g., present at a professional society). ▪ Be recognized for leadership and expertise at local, regional and/or statewide levels. ▪ Serve as principal investigator and/or co-principal investigator in applied research.
University and Public Service Services to the local CE unit, ANR, and/or the University at large are a critical part of an academic appointee's responsibilities. Contributions to the community and beyond are also expectations of the academic appointment, representing UC and the academic discipline.	▪ Not required at the assistant rank, though encouraged. ▪ Seek opportunities and serve in activities that support ANR. (e.g., volunteer to assist with UC conferences or meetings). ▪ Actively participate in UC ANR Program Teams and associated Work Groups. ▪ Serve in activities that support the local unit (e.g., county committees). ▪ Serve in public activities (e.g., judge a science fair, serve on committees).	▪ Serve in activities that support and/or represent ANR, the broader UC community, or other academic entities. (e.g., academic search committees, Academic Assembly Council committees, Statewide program advisory committees/councils, conference planning committees, industry and government-related committees that serve local needs). ▪ Actively participate in and/or lead UC ANR Program Teams and associated Work Groups; ▪ Serve in activities and/or committees that support the local unit. ▪ Participate in activities that serve the public (e.g., serving on committees and boards of directors).	▪ Serve in activities that provide leadership and support to further ANR, UC goals, and objectives (e.g., UC, governmental, and other pertinent academic entities). ▪ Leadership in UC ANR Program Teams, associated Work Groups, or Program Areas ▪ Serve in activities that provide leadership and support to the local unit. ▪ Provide leadership and support for activities that serve the public.
Civil Rights Compliance and Principles of Community Familiarity with and documentation of Civil Rights requirements is a legal requirement of federal fund recipients. All UC ANR are also	▪ Demonstrate understanding and dedication to civil rights compliance. As appropriate, identify and define clientele (establishing appropriate baselines) and develop methods to serve them. ▪ Demonstrate contributions and activities that foster UC ANR's Principles of Community and develop an	▪ As appropriate, continue to update clientele baseline data and show evidence of program efforts to reach and serve your defined clientele. ▪ Demonstrate contributions and activities that foster UC ANR's Principles of Community and develop an	▪ As appropriate, continue to update clientele baseline data and show evidence of program efforts to reach and serve your defined clientele. ▪ Demonstrate contributions and activities that foster UC ANR's Principles of Community and develop an

expected to adhere to UC ANR Principles of Community.	environment that maximizes the potential of all participants and employees.	environment that maximizes the potential of all participants and employees	environment that maximizes the potential of all participants and employees

Professional Researcher (full title VI to above scale)

	Full Title, Step VI	Full Title, Steps VII, VIII, IX	Full Title, above scale
Summary	Advancement may be granted when the Program Review dossier presents evidence of a balanced and outstanding program and shows significant contributions and continuous professional growth in the three academic criteria for advancement over the individual's entire career in the full title rank. At least three years of service in the preceding step are expected before advancement to full title, step VI. Advancement to step VI is considered a promotion.	Full title, steps VII, VIII and IX are for persons who have made exceptional contributions in their program area or discipline, resulting in significant benefits to the State of California, the nation, and contributing favorably to the prestige of the University of California. Candidates must demonstrate continuing superior performance, documented programmatic impact, and professional stature in their field as evidenced by the candidates' recognition and significant contributions to the field or profession. They must also demonstrate peer leadership, originality, and ability to effectively collaborate with others. At least three years of service in the preceding step are expected before advancement to the next full title step. Advancement to step IX is reserved for persons of the highest distinction whose work has been nationally recognized and acclaimed. Individuals must show strong evidence of a well-balanced program with outstanding performance. Use of the top step in the salary scale for this series shall be restricted to those for whom there is, in at least three of the criteria mentioned above, documented evidence of exceptional or outstanding achievement or unusual qualifications in terms of education and experience. When it is feasible, such documentation by sources outside the University of California should include written testimony to and evaluation of an individual's achievements. Demonstrate efforts that reflect a positive and sustained commitment to Affirmative Action. Individuals must show evidence of recognition from peers and clientele not only at a local and state level, but also at the national and/or international level.	There must be demonstration of additional merit and distinction beyond the performance on which advancement to step IX was based.
Research and Creative Work Independent research equivalent to that required for the Professor series.	▪ Provide leadership for collaborative research and/or creative activities (e.g., Principal Investigator for research project). ▪ Demonstrate effective dissemination of research findings using appropriate communication media (e.g., presentations, workshops, popular publications, websites, etc.). ▪ Clearly demonstrate evidence that extension and research are part of the continuum (integrate research and education programs where research leads to education while working with a network of colleagues to extend research-based information). ▪ Serve as an author in non-peer-reviewed and peer-reviewed publications that have significance beyond the local level. Co-authorship is essential.	▪ Provide leadership in research and creative activity that is relevant to local needs and is statewide or national in scope. ▪ Extend research findings using appropriate communication media (e.g., UC publications, journal articles, workshops, presentations, etc.). ▪ Participate and collaborate in activities that generate new knowledge in the discipline. ▪ Make substantial contributions, including serving as an author and showing leadership in a variety of publications that are peer-reviewed and scholarly and reach clientele beyond the local level.	Demonstrate leadership roles and distinctive impacts in activities and services that support ANR, UC, other academic entities, and/or the public. Must perform in a stellar manner in all three criteria areas. Except in rare and compelling cases, advancement will not occur in less than 4 years at step IX.
Professional Competence and Activity Competence in the subject matter appropriate to the discipline is fundamental to individual success and to the success and progress of UC ANR.	▪ Demonstrate expertise in at least one aspect of the program area. ▪ Demonstrate significant participation in activities that serve the public beyond the local and/or regional level. ▪ Intellectual leadership as demonstrated by recognition for expertise among peers and clientele at the state and multi-state level (e.g., speaker at national and/or international conference).	▪ Demonstrate outstanding performance in all areas of their program as evidenced by sustained superior performance and professional stature in their field. ▪ Intellectual leadership as evidenced by recognition for their expertise among peers and clientele at local, statewide, multi-state, national and/or international levels (e.g., speaker, serve on editorial board of journal, reviewer of peer-reviewed publications, national committees, professional society boards, etc.).	
University and Public Service Services to the local CE unit, ANR, and/or the University at large are a critical part of an academic appointee's responsibilities. Contributions to the community and beyond are also expectations of the academic appointment, representing UC and the academic discipline.	▪ Provide sustained leadership for activities that support ANR, UC and/or other academic entities. ▪ Demonstrate increased leadership to the local unit. ▪ Provide increased leadership for activities that serve the public.	▪ Serve in leadership roles in activities that support ANR, UC and/or other academic entities. ▪ Provide leadership to the local unit. ▪ Demonstrate leadership for activities that serve the public (e.g., member of state or national board). ▪ It is essential that the advisor provides mentoring and leadership to newer advisors and demonstrates support for working on critical needs/projects that best serve the University and clientele (e.g., special UC or industry-related committees, cross-county assignments, Acting CD, etc.).	
Civil Rights Compliance and Principles of Community Familiarity with and documentation of Civil Rights requirements is a legal requirement of federal fund recipients. All UC ANR are also expected to adhere to UC ANR Principles of Community.	▪ As appropriate, continue to update clientele baseline data and show evidence of program efforts to reach and serve your defined clientele. ▪ Demonstrate contributions and activities that foster UC ANR's Principles of Community and develop an environment that maximizes the potential of all participants and employees. ▪	▪ As appropriate, continue to update clientele baseline data and show evidence of program efforts to reach and serve your defined clientele. ▪ Demonstrate contributions and activities that foster UC ANR's Principles of Community and develop an environment that maximizes the potential of all participants and employees.	

Project Scientist (assistant to full title V)

	Assistant	Associate	Full Title
Summary	Assistant rank is the entry level for academic appointees. The academic criteria of research and competence need not be equally developed. For advancement in this rank, emphasis must be on the area of Research and Creative Work. Academics are expected to explore innovative ideas and methodology and demonstrate the ability to interact well with colleagues and clientele.	The associate rank is intended for academic appointees who demonstrate significant potential for a productive career within Cooperative Extension. Academics in this rank must demonstrate an ability to effectively set program priorities, make long-range program planning decisions, interact well with colleagues and clientele, and demonstrate impacts from conducting Research and Creative Activity. The academic program should clearly demonstrate that it is moving toward balance among the two academic criteria for advancement. The normal period of service in the rank of Associate Project Scientist is six years.	Full title rank is reserved for academic appointees who are successfully making positive contributions to their discipline and whose program shows evidence of growth, depth, clientele and colleague respect, professional improvement, and equitable opportunities for participation. Candidates considered for promotion from the associate to full title rank must demonstrate continued professional growth and leadership in their program area. Academics must have an excellent program, incorporating the two advancement criteria, including affirmative action efforts.
Research and Creative Work Demonstrated significant, original, and creative contribution to a research or creative program or project	▪ Demonstrate ability to assess program needs and priorities. ▪ Evaluate and/or develop appropriate, innovative methodologies that enhance clientele's knowledge in the program area to the extent possible. ▪ Develop research and/or creative activity in a collaborative and team-oriented atmosphere. Work with other UC academic colleagues to develop (write or edit) relevant publications for local clientele and related industries as appropriate (e.g., newsletter for growers/clientele; news articles, web page for the program, or other innovative methodologies).	▪ Demonstrate the ability to develop a focused research/education program based on evolving clientele needs and the ANR strategic plan. ▪ Collaborate with colleagues and community partners in program development, implementation, and evaluation. ▪ Serve as an author in a variety of publications (e.g., newsletters, articles for the popular press, web-based applications, UC Delivers, and contribute to peer-reviewed publications).	▪ Participate in applied research and/or scholarly activity as evidenced by their presentation and publication record. ▪ Focus program on the research extension continuum (integrate research and education programs where research leads to education while working with a network of colleagues to extend research-based information). ▪ Serve as an author in a variety of publications (e.g., UC Delivers, articles for popular press, newsletters, peer-reviewed publications). ▪ Collaborate in acquiring internal and/or external funding for research, extension and/or creative activity.
Professional Competence and Activity Competence in the subject matter appropriate to the discipline is fundamental to individual success, and to the success and progress of UC ANR.	▪ Enhance skills and knowledge in assigned program area(s) and acquire additional skills as needed. (e.g., join a professional society and attend a meeting; complete a short course; work with mentors). ▪ Build credibility with clientele. Seek opportunities to attend and participate in clientele/industry/community-sponsored functions and establish a clientele network. ▪ Develop professional relationships that may produce long-term and meaningful University contributions.	▪ Demonstrate growth by improving skills and knowledge. ▪ Participate in professional conferences.	▪ Demonstrate sustained professional growth and contribute to the subject area. ▪ Demonstrate sustained growth in skills and knowledge (e.g., present at a professional society). ▪ Be recognized for leadership and expertise at local, regional and/or statewide levels. ▪ Serve as principal investigator and/or co-principal investigator in applied research.
NOT REQUIRED FOR THIS TITLE SERIES, THOUGH ENCOURAGED **University and Public Service** Services to the local CE unit, ANR, and/or the University at large are a critical part of an academic appointee's responsibilities. Contributions to the community and beyond are also expectations of the academic appointment, representing UC and the academic discipline.	▪ Seek opportunities and serve in activities that support ANR. (e.g., volunteer to assist with UC conferences and meetings). ▪ Actively participate in UC ANR Program Teams and associated Work Groups. ▪ Serve in activities that support the local unit (e.g., county committees). ▪ Serve in public activities (e.g., judge a science fair, serve on committees).	▪ Serve in activities that support and/or represent ANR, the broader UC community, or other academic entities. (e.g., academic search committees, Academic Assembly Council committees, Statewide program advisory committees/councils, conference planning committees, industry and government-related committees that serve local needs). ▪ Actively participate in and/or lead UC ANR Program Teams and associated Work Groups ▪ Serve in activities and/or committees that support the local unit. ▪ Participate in activities that serve the public (e.g., serving on committees and boards of directors).	▪ Serve in activities that provide leadership and support to further ANR, UC goals, and objectives (e.g., UC, governmental, and other pertinent academic entities, leadership in workgroup activities). ▪ Leadership in UC ANR Program Teams, associated Work Groups, or Program Areas. ▪ Serve in activities that provide leadership and support to the local unit. ▪ Provide leadership and support for activities that serve the public.
Civil Rights Compliance and Principles of Community Familiarity with and documentation of Civil Rights requirements is a legal requirement of federal fund recipients. All UC ANR are also expected to adhere to UC ANR Principles of Community.	▪ Demonstrate understanding and dedication to the Division's civil rights compliance program. As appropriate, identify and define clientele (establishing appropriate baselines) and develop methods to serve them. ▪ Demonstrate contributions and activities that foster UC ANR's Principles of Community and develop an environment that maximizes the potential of all participants and employees.	▪ As appropriate, continue to update clientele baseline data and show evidence of program efforts to reach and serve your defined clientele. ▪ Demonstrate contributions and activities that foster UC ANR's Principles of Community and develop an environment that maximizes the potential of all participants and employees. ▪	▪ As appropriate, continue to update clientele baseline data and show evidence of program efforts to reach and serve your defined clientele. ▪ Demonstrate contributions and activities that foster UC ANR's Principles of Community and develop an environment that maximizes the potential of all participants and employees. ▪

Project Scientist (full title VI to above scale)

	Full Title, Step VI	Full Title, Steps VII, VIII, IX	Full Title, above scale
Summary	Advancement may be granted when the Program Review dossier presents evidence of a balanced and outstanding program and shows significant contributions and continuous professional growth in the two academic criteria for advancement over the individual's entire career in the full title. At least three years of service in the preceding step are expected before advancement to full title, step VI. Advancement to step VI is considered a promotion.	Full title, steps VII, VIII and IX are for persons who have made exceptional contributions in their program area or discipline, resulting in significant benefits to the State of California, the nation, and contributing favorably to the prestige of the University of California. Candidates must demonstrate continuing superior performance and professional stature in their field as evidenced by the candidates' recognition and significant contributions to the field or profession. They must also demonstrate peer leadership, originality, and ability to effectively collaborate with others. At least three years of service in the preceding step are expected before advancement to the next full title step. Advancement to step IX is reserved for persons of the highest distinction whose work has been nationally recognized and acclaimed. Individuals must show strong evidence of a well-balanced program with outstanding performance. Use of the top step in the salary scale for this series shall be restricted to those for whom there is, in at least two of the criteria mentioned above, documented evidence of exceptional or outstanding achievement or unusual qualifications in terms of education and experience. When it is feasible, such documentation by sources outside the University of California should include written testimony to and evaluation of an individual's achievements. Demonstrate efforts that reflect a positive and sustained commitment to Affirmative Action. Individuals must show evidence of recognition from peers and clientele not only at a local and state level, but also at the national and/or international level.	There must be demonstration of additional merit and distinction beyond the performance on which advancement to step IX was based. Demonstrate leadership roles and distinctive impacts in activities and services that support ANR, UC, other academic entities, and/or the public. Must perform in a stellar manner in both criteria areas. Except in rare and compelling cases, advancement will not occur in less than 4 years at step IX.
Research and Creative Work Demonstrated significant, original and creative contribution to a research or creative program or project.	▪ Provide leadership for collaborative research and/or creative activities (e.g., Principal Investigator for a research project). ▪ Demonstrate effective dissemination of research findings using appropriate communication media (e.g., presentations, workshops, popular publications, websites, etc.). ▪ Clearly demonstrate evidence that extension and research are part of the continuum (integrate research and education programs where research leads to education while working with a network of colleagues to extend research-based information). ▪ Serve as an author in non-peer-reviewed and peer-reviewed publications that have significance beyond the local level. Co-authorship is essential.	▪ Provide leadership in research and creative activity that is relevant to local needs and is statewide or national in scope. ▪ Extend research findings using appropriate communication media (e.g., UC publications, journal articles, workshops, presentations, etc.). ▪ Participate and collaborate in activities that generate new knowledge in the discipline. ▪ Make substantial contributions, including serving as an author in a variety of publications that are peer-reviewed, scholarly, and reach clientele beyond the local level.	
Professional Competence and Activity Competence in the subject matter appropriate to the discipline is fundamental to individual success, and to the success and progress of UC ANR.	▪ Demonstrate expertise in at least one aspect of the program area. ▪ Demonstrate significant participation in activities that serve the public beyond the local and/or regional level. ▪ Intellectual leadership as demonstrated by recognition for expertise among peers and clientele at the state and multi-state level (e.g., speaker at national and/or international conference).	▪ Demonstrate outstanding performance in all areas of their program as evidenced by sustained superior performance and professional stature in their field. ▪ Intellectual leadership as evidenced by recognition for their expertise among peers and clientele at local, statewide, multi-state, national and/or international levels (e.g., speaker, serve on editorial board of journal, reviewer of peer-reviewed publications, national committees, professional society boards, etc.).	
NOT REQUIRED FOR THIS TITLE SERIES, THOUGH ENCOURAGED **University and Public Service** Services to the local CE unit, ANR, and/or the University at large are a critical part of an academic appointee's responsibilities. Contributions to the community and beyond are also expectations of the academic appointment, representing UC and the academic discipline.	▪ Provide sustained leadership for activities that support ANR, UC and/or other academic entities. ▪ Demonstrate increased leadership to the local unit. ▪ Provide increased leadership for activities that serve the public.	▪ Serve in leadership roles in activities that support ANR, UC and/or other academic entities. ▪ Provide leadership to the local unit. ▪ Demonstrate leadership for activities that serve the public (e.g., member of state or national board). ▪ It is essential that the advisor provides mentoring and leadership to newer advisors and demonstrates support for working on critical needs/projects that best serve the University and clientele (e.g., special UC or industry-related committees, cross-county assignments, Acting CD, etc.).	
Civil Rights Compliance and Principles of Community Familiarity with and documentation of Civil Rights requirements is a legal requirement of federal fund recipients. All UC ANR are also expected to adhere to UC ANR Principles of Community.	▪ As appropriate, continue to update clientele baseline data and show evidence of program efforts to reach and serve your defined clientele. ▪ Demonstrate contributions and activities that foster UC ANR's Principles of Community and develop an environment that maximizes the potential of all participants and employees. ▪	▪ As appropriate, continue to update clientele baseline data and show evidence of program efforts to reach and serve your defined clientele. ▪ Demonstrate contributions and activities that foster UC ANR's Principles of Community and develop an environment that maximizes the potential of all participants and employees. ▪	

Cooperative Extension Advisor (assistant to full title V)

	Assistant	Associate	Full Title I-V
Summary	For advancement within this rank, appointees must demonstrate the ability to assess needs, set priorities, and plan, organize, implement, and evaluate extension programs. Skills in the area of applied research and creative activity should also be demonstrated. Appointees must also possess good communication skills and show an ability to interact well with colleagues and clientele. Entry-level appointees must be receptive to innovative ideas and methodologies in order to build a productive career in Cooperative Extension. Efforts that reflect a dedication to continual professional improvement and a commitment to equitable outreach must be clearly demonstrated. At the assistant level, all four academic criteria for advancement need not be equally developed; emphasis will be on the areas of extending knowledge and information and applied research and creative activity.	Associate rank is reserved for appointees who demonstrate significant potential for a productive career within Cooperative Extension. They must demonstrate an ability to set program priorities, make long-range program planning decisions, and interact well with colleagues and clientele. They must demonstrate initiative and leadership in program development and delivery with sufficient programmatic evaluation to ascertain changes or anticipated changes associated with extension programming. The program must be clearly moving toward balance among the four academic criteria for advancement and show evidence of equitable outreach commitment and efforts.	Full title rank is reserved for academic appointees who are successfully making positive contributions to their discipline and whose program shows evidence of growth, depth, growing clientele and colleague respect, professional improvement, and equitable opportunities for participation. Candidates considered for promotion from associate to full title rank must have developed an excellent program, incorporating the four advancement criteria and equitable outreach efforts. Program accomplishments must show excellence in developing and conducting extension educational programs. This should include authorship of peer-reviewed publications and county or statewide publications that are designed for clientele use or intellectual contribution and leadership for curriculum development. Candidates for advancement to full title rank are expected to have demonstrated long-range planning leadership within their program area.
Extending Knowledge and Information* An effective extension program involves effective teaching through the design and implementation of strategies that will lead clientele to use research-based knowledge to improve their situations by adopting specific practices and technologies. Media may include publications, articles in popular and trade magazines, newspapers, and professional journals; radio and television programming; visual media productions; computer software; and new technologies as they are developed. Methods may include independent learning programs, field tours, symposia, workshops, and short courses. Program results or impacts must be documented. **Applied Research and Creative Activity*** Academics are expected to proceed from a base of research information to use the process of scientific inquiry and analyze program results. Applied research: empirical effort to solve major problems; characterized by quality and quantity of effort; preparation of sound plans; quality and quantity of research reports; contributions of research efforts to an industry or to the various public agencies. Creative activity: development, implementation and evaluation of the creative adaptation of scientific knowledge or research information to solve specific problems. Creativity involves the origination of new ideas or practices. *Note that these are two distinct advancement review criteria.	▪ Demonstrate ability to assess program needs and priorities (i.e., primarily in 1st and 2nd terms). ▪ Evaluate and/or develop appropriate, innovative methodologies that enhance clientele's knowledge in the program area to the extent possible. ▪ Develop a foundation of high-quality educational programs (e.g., plan and deliver workshops, seminars, field days for clientele; or collaborate in delivering workshops). ▪ Develop research and/or creative activity in a collaborative and team-oriented atmosphere. Work with other UC Academic colleagues to develop (write or edit) relevant publications for local clientele and related industries as appropriate (e.g., newsletter for growers/clientele; news articles, web page for the program, or other innovative methodologies). ▪ Document anticipated program outcomes and impacts.	▪ Demonstrate initiative and leadership by delivering high-quality programs that address clientele needs and/or community issues. ▪ Demonstrate the ability to develop a focused research/education program based on evolving clientele needs and the ANR strategic plan. ▪ Develop an area of expertise within your program area that is relevant to clientele needs. ▪ Collaborate with colleagues and community partners in program development, implementation, and evaluation, and to identify resources for program delivery. ▪ Serve as an author in a variety of publications (e.g., newsletters, articles for popular press, web-based applications, UC Delivers, and contribute to peer-reviewed publications). ▪ Document program outcomes and impacts (or anticipated impacts).	▪ Demonstrate excellence in developing educational programs that are effective in teaching and/or advising program clientele that contribute to the discipline. ▪ Participate in applied research and/or scholarly activity as evidenced by their presentation and publication record. ▪ Focus program on the research extension continuum (integrate research and education programs where research leads to education while working with a network of colleagues to extend research-based information). ▪ Serve as author and show leadership in a variety of publications (e.g., UC Delivers, articles for popular press, newsletters, peer-reviewed publications). ▪ Collaborate in acquiring internal and/or external funding for research, extension and/or creative activity. ▪ Clearly document program outcomes and impacts (or anticipated impacts).
Professional Competence and Activity An employee's professional activities in their discipline, including knowledge of the subject matter or specialty and the ability to apply this knowledge in practice; evidence of achievement and recognition by colleagues and clientele for providing leadership in the field (including awards, honors, and grants); articles published in professional and trade journals; consulting services to other agencies and editorial board services; or active membership in disciplinary societies and professional associations, or other activities indicative of professional standing and leadership.	▪ Enhance skills and knowledge in assigned program area(s) and acquire additional skills as needed. (e.g., join a professional society and attend a meeting; complete a short course; work with mentors). ▪ Build credibility with clientele. Seek opportunities to attend and participate in clientele, industry, or community-sponsored functions and establish a clientele network. ▪ Develop professional relationships that may produce long-term and meaningful University contributions.	▪ Demonstrate growth by improving skills and knowledge. ▪ Participate in professional conferences.	▪ Demonstrate sustained professional growth and contribute to the subject area. ▪ Demonstrate sustained growth in skills and knowledge (e.g., present at a professional society). ▪ Be recognized for leadership and expertise at local, regional and/or statewide levels. ▪ Serve as principal investigator and/or co-principal investigator in applied research and/or extension projects.
University and Public Service Services to the University, the Division, and CE are an important part of an academic appointee's responsibilities. Significant contributions to the community, state, and/or national affairs will also be considered as evidence for advancement. Activity reported in this category must be related to the subject matter or disciplinary responsibilities as defined in the appointee's position description.	▪ Seek opportunities and serve in activities that support ANR. (e.g., volunteer to assist with UC conferences and meetings). ▪ Actively participate in UC ANR Program Teams and associated Work Groups. ▪ ▪ Serve in activities that support the local unit (e.g., county committees). ▪ Serve in public activities (e.g., judge a science fair, serve on committees).	▪ Serve in activities that support and/or represent ANR, the broader UC community, or other academic entities. (e.g., academic search committees, Academic Assembly Council, Statewide advisory committees, etc.). ▪ Actively participate in and/or lead UC ANR Program Teams and associated Work Groups.Serve in activities and/or committees that support the local unit. ▪ Participate in activities that serve the public (e.g., serving on committees and boards of directors).	▪ Serve in activities that provide leadership and support to further ANR, UC goals, and objectives (e.g., UC, governmental, and other pertinent academic entities, leadership in workgroup activities). ▪ Leadership in UC ANR Program Teams, associated Work Groups, or Program Areas. ▪ Serve in activities that provide leadership and support to the local unit. ▪ Provide leadership and support for activities that serve the public.
Civil Rights Compliance and Principles of Community Familiarity with and documentation of Civil Rights requirements is a legal requirement of federal fund recipients. All UC ANR are also expected to adhere to UC ANR Principles of Community.	▪ Demonstrate understanding and dedication to the Division's Civil Rights Compliance expectations, including identifying and defining clientele (establishing	▪ Continue to update clientele baseline data and show evidence of program efforts to reach and serve your defined clientele.	▪ Continue to update clientele baseline data and show evidence of program efforts to reach and serve your defined clientele.

	appropriate baselines) and developing methods to serve them. ▪ Demonstrate contributions and activities that foster ANR's Principles of Community and develop an environment that maximizes the potential of all participants and employees.	▪ Demonstrate contributions and activities that foster UC ANR's Principles of Community and develop an environment that maximizes the potential of all participants and employees.	▪ Demonstrate contributions and activities that foster UC ANR's Principles of Community and develop an environment that maximizes the potential of all participants and employees.

Cooperative Extension Advisor (full title VI to above scale)

	Full Title, Step VI	Full Title, Steps VII, VIII, IX	Full Title, above scale
Summary	At least three years of service in the preceding step are expected before advancement to full title, step VI. This advancement will be granted if evidence documents a balanced and outstanding program, showing significant and continuous growth in the four academic criteria for advancement: Extending knowledge and information, Applied research and creative activity, Professional competence and activity, and University and public service. There must also be evidence that the candidate's influence and recognition within their discipline have grown. Efforts that reflect a positive commitment to equitable outreach must be demonstrated.	Advancement into these steps usually will not occur without at least three years of service in the previous step. Full title, steps VII, VIII, and IX are reserved for persons who have made exceptional contributions to major program areas, resulting in significant benefits to the people of California and contributing favorably to the prestige of the University of California and Cooperative Extension. Candidates must provide evidence of continuing superior performance and professional stature in their field. They must also demonstrate peer leadership, originality, and ability to work effectively with others. Advancement to step IX is reserved for persons of the highest distinction whose work has been nationally recognized and acclaimed. Individuals should show strong evidence of having developed a well-balanced program with outstanding performance in all four of the academic criteria for advancement. Efforts that reflect a positive commitment to equitable outreach must also be demonstrated. Strong evidence must be provided to show a wide scope of recognition from peers and clients and a highly meritorious record of public and university service.	There must be demonstration of additional merit and distinction beyond the performance on which advancement to step IX was based. Demonstrate leadership roles and distinctive impacts in activities and service that support ANR, UC, other academic entities, and/or the public. Must perform in a stellar manner in all four criteria areas. Except in rare and compelling cases, advancement will not occur in less than 4 years at step IX.
Extending Knowledge and Information*/ Applied Research and Creative Activity* *Note that these are two distinct advancement review criteria.	▪ Demonstrate sustained excellence in program delivery and contribute to discipline at the local, state and/or national level. ▪ Provide leadership for collaborative research and/or creative activities (e.g., Principal Investigator for research project). ▪ Demonstrate effective extension of knowledge and dissemination of research findings using appropriate communication media (e.g., presentations, workshops, popular publications, websites, etc.). ▪ Clearly demonstrate evidence that extension and research are part of the continuum (integrate research and education programs where research leads to education while working with a network of colleagues to extend research-based information). ▪ Serve as an author and show leadership in non-peer-reviewed and peer-reviewed publications that have significance beyond the local level.	▪ Demonstrate excellence in program delivery (e.g., the program consistently contributes at the local, statewide, and/or national level). ▪ Provide leadership in research and creative activity that is relevant to local needs and is statewide or national in scope. ▪ Extend research findings using appropriate communication media (e.g., UC publications, journal articles, workshops, presentations, etc.). ▪ Participate and collaborate in activities that generate new knowledge in the discipline. ▪ Make substantial contributions, including serving as author and show leadership in a variety of publications that are peer-reviewed, scholarly, and reach clientele beyond the local level.	
Professional Competence and Activity	▪ Demonstrate expertise in at least one aspect of program area. ▪ Demonstrate significant participation in activities that serve the public beyond the local and/or regional level. ▪ Intellectual leadership as demonstrated by recognition for expertise among peers and clientele at state and/or multi-state level (e.g., speaker at national and/or international conference).	▪ Demonstrate outstanding performance in all areas of their program as evidenced by sustained superior performance and professional stature in their field. ▪ Intellectual leadership as evidenced by recognition for their expertise among peers and clientele at local, statewide, multi-state, national and/or international levels (e.g., speaker, serve on editorial board of journal, reviewer of peer-reviewed publications, national committees, professional society boards, etc.).	
University and Public Service	▪ Provide sustained leadership for activities that support ANR, UC and/or other academic entities. ▪ Demonstrate increased leadership to the local unit. ▪ Provide increased leadership for activities that serve the public. ▪ Leadership in UC ANR Program Teams, associated Work Groups, or Program Areas. ▪	▪ Serve in leadership roles in activities that support ANR, UC and/or other academic entities. ▪ Provide leadership to local unit. ▪ Demonstrate leadership for activities that serve the public (e.g., member of state or national board). ▪ Leadership in UC ANR Program Teams, associated Work Groups, or Program Areas.It is essential that the advisor provides mentoring and leadership to newer advisors and demonstrates support for working on critical needs/projects that best serve the University and clientele (e.g., special UC or industry-related committees, cross-county assignments, Acting CD, etc.).	
Civil Rights Compliance and Principles of Community Familiarity with and documentation of Civil Rights requirements is a legal requirement of federal fund recipients. All UC ANR are also expected to adhere to UC ANR Principles of Community.	▪ Continue to update clientele baseline data and show evidence of program efforts to reach and serve your defined clientele. ▪ Demonstrate contributions and activities that foster UC ANR's Principles of Community and develop an environment that maximizes the potential of all participants and employees. ▪	▪ Continue to update clientele baseline data and show evidence of program efforts to reach and serve your defined clientele. ▪ Demonstrate contributions and activities that foster UC ANR's Principles of Community and develop an environment that maximizes the potential of all participants and employees. ▪	

Specialist in Cooperative Extension (assistant to full Title V)

	Assistant	Associate	Full Title I-V
Summary	For advancement within this rank, appointees must demonstrate the ability to conduct educational activities and mission-oriented research in their area of specialty. The CE research should serve the educational mission. Efforts that reflect a dedication to continual professional improvement and a commitment to equitable outreach must be clearly demonstrated. At the assistant level, all four academic criteria for advancement need not be equally developed; emphasis will be on the areas of extending knowledge and information and applied research and creative activity.	Associate rank is reserved for appointees who demonstrate significant potential for a productive career within Cooperative Extension. They must demonstrate a strong applied research program and initiative and leadership in program development and delivery. They must show the ability to set program priorities and interact well with colleagues inside and outside of the University. The program must be clearly moving toward balance among the four academic criteria for advancement and show evidence of equitable outreach commitment and efforts. The normal term of service as Associate Specialist in Cooperative Extension is six years.	Full title rank is reserved for academic appointees who are successfully making excellent contributions within Cooperative Extension. Candidates considered for promotion from associate to full title rank must have developed an excellent program, incorporating the four advancement criteria and equitable outreach efforts. Program accomplishments must show excellence in developing and conducting extension educational programs. Candidates for advancement to full title rank are expected to have demonstrated long-range planning leadership within their program area.
Extending Knowledge and Information* An effective extension program involves effective teaching through the design and implementation of strategies that will lead clientele to use research-based knowledge to improve their situations by adopting specific practices and technologies. Media may include publications, articles in popular and trade magazines, newspapers, and professional journals; radio and television programming; visual media productions; computer software; and new technologies as they are developed. Methods may include independent learning programs, field tours, symposia, workshops, and short courses. Program results or impacts must be documented. **Applied Research and Creative Activity*** Academics are expected to proceed from a base of research information to use the process of scientific inquiry and analyze program results. Applied research: empirical effort to solve major problems; characterized by quality and quantity of effort; preparation of sound plans; quality and quantity of research reports; contributions of research efforts to an industry or to the various public agencies. Creative activity: development, implementation and evaluation of the creative adaptation of scientific knowledge or research information to solve specific problems. Creativity involves the origination of new ideas or practices. *Note that these are two distinct advancement review criteria.	▪ Demonstrate ability to assess program needs and priorities. ▪ Extend knowledge and information to clientele identified through a needs assessment via extension education methods. ▪ Develop an applied research program to address critical complex issues that support the effort in extending knowledge. ▪ Seek funding and leverage resources for program support from extramural and/or other sources. ▪ Publish work of applied research in a combination of peer-reviewed and non-peer-reviewed publication types based on the relevant audiences served by the appointee's CE program ▪ Demonstrate collaborations within and outside of the University UCCE research/extension network. ▪ Document anticipated program outcomes and impacts.	▪ Demonstrate initiative and leadership in delivery of an intentional, active, and high-quality extension education. ▪ Demonstrate a strong applied research program in addressing critical complex issues that support the effort in extending knowledge. ▪ Serve as principal investigator and/or co-principal investigator in applied research and/or extension projects funded by extramural and/or other sources. ▪ Demonstrate collaborations within and outside of the University UCCE research/extension network, including with state, national, and/or international experts in the field. ▪ Serve as an author in a combination of research publication types (peer-reviewed and non-peer-reviewed) and show leadership in experimental design and data analysis. ▪ Document program outcomes and impacts (or anticipated impacts).	▪ Demonstrate excellence in delivery of an intentional, active, high-quality extension education. ▪ Demonstrate excellence in applied research in addressing critical complex issues that support the effort in extending knowledge. ▪ Show excellence in program delivery in the research extension continuum (i.e., integrate research and education programs where research leads to education while working with a network of colleagues to extend research-based information). ▪ Demonstrate collaborations within and outside of the University UCCE research/extension network, including with state, national, and/or international experts in the field. ▪ Serve as principal investigator and/or co-principal investigator in applied research and/or extension projects funded by extramural and/or other sources. ▪ Show excellence in publications in a combination of research publication types (peer-reviewed and non-peer-reviewed) and show leadership in experimental design and data analysis. ▪ Clearly document program outcomes and impacts (or anticipated impacts).
Professional Competence and Activity An employee's professional activities in their discipline, including knowledge of the subject matter or specialty and the ability to apply this knowledge in practice; evidence of achievement and recognition by colleagues and clientele for providing leadership in the field (including awards and honors); consulting services to other agencies and editorial board services; or active membership in disciplinary societies and professional associations, or other activities indicative of professional standing and leadership.	▪ Enhance skills and knowledge in assigned program area(s) and acquire additional skills as needed. (e.g., join a professional society and attend a meeting, complete a short course, work with mentors). ▪ Build credibility with academic colleagues and clientele at regional, statewide, and/or national levels. ▪ Develop professional relationships that may produce long-term and meaningful University contributions.	▪ Demonstrate growth by improving skills and knowledge. ▪ Participate in professional conferences. ▪ Be recognized for leadership and expertise at regional, statewide, and/or national levels (e.g., professional societies).	▪ Demonstrate continued professional growth and contributions to the subject area. ▪ Demonstrate sustained growth in skills, knowledge, and leadership. ▪ Be recognized for leadership and expertise at regional, statewide, national, and/or international levels (e.g., professional societies).
University and Public Service Services to the University, the Division, and CE are an important part of an academic appointee's responsibilities. Significant contributions to the community, state, and/or national affairs will also be considered as evidence for advancement. Activity reported in this category must be related to the subject matter or disciplinary responsibilities as defined in the appointee's position description.	▪ Seek opportunities to support and/or represent ANR, the broader UC community, and other academic entities (e.g., academic search committees, Academic Assembly Council committees, Statewide program advisory committees/councils). ▪ Seek opportunities for building capacity within the UCCE system and support other UCCE academics. ▪ Seek opportunities to serve the public (e.g., serving on committees and boards of directors, industry or government committees that serve local needs).	▪ Serve in activities that support and/or represent ANR, the broader UC community, and other academic entities (e.g., academic search committees, Academic Assembly Council committees, Statewide program advisory committees/councils). ▪ Build capacity within the UCCE system and support other UCCE academics. ▪ Participate in activities that serve the public (e.g., serving on committees and boards of directors, industry and government-related committees that serve local needs).	▪ Show excellence in service and leadership to the University and the public ▪ Serve in activities that provide leadership to further ANR, UC goals, and objectives (e.g., UC, governmental, and other pertinent academic entities). ▪ Building capacity within the UCCE system and supporting other UCCE academics. ▪ Serve in activities that provide leadership in UC ANR Program Teams, associated Work Groups, or Program Areas, and/or across UC ANR.

Civil Rights Compliance and Principles of Community Familiarity with and documentation of Civil Rights requirements is a legal requirement of federal fund recipients. All UC ANR are also expected to adhere to UC ANR Principles of Community.	▪ Demonstrate understanding and dedication to the Division's civil rights compliance program, including identifying and defining clientele (establishing appropriate baselines) and developing methods to serve them. ▪ Demonstrate contributions and activities that foster UC ANR's Principles of Community and develop an environment that maximizes the potential of all participants and employees.	▪ Continue to update clientele baseline data and show evidence of program efforts to reach and serve your defined clientele. ▪ Demonstrate contributions and activities that foster UC ANR's Principles of Community and develop an environment that maximizes the potential of all participants and employees.	▪ Continue to update clientele baseline data and show evidence of program efforts to reach and serve your defined clientele. ▪ Demonstrate contributions and activities that foster UC ANR's Principles of Community and develop an environment that maximizes the potential of all participants and employees.

Specialist in Cooperative Extension (full title VI to above scale)

Additional Requirements for Full Title, Step VI: Advancement to Step VI usually will not occur after less than three years of service at Step V and will be granted on evidence of 1) excellent performance in extending knowledge and information, 2) highly distinguished scholarship, especially applied scholarship, and/or creative work, 3) excellence in professional competence and activity, and 4) highly meritorious University and public service. In interpreting these criteria for advancement to Step VI, reviewers should require evidence of excellence and high merit in performance in extending knowledge and information; in scholarship, especially applied scholarship and/or creative achievement; in professional competence and activity; and in service. In addition, there should be a great distinction, recognized nationally or internationally, in the performance 1) of extending knowledge and information or 2) in scholarly and creative achievement.

Additional requirements for Full Title, Steps VII, VIII, IX: Advancement into these steps usually will not occur without at least three years of service in the previous step. Full title, steps VII, VIII, and IX are reserved for persons who have made exceptional contributions to major program areas, resulting in significant benefits to the people of California and contributing favorably to the prestige of the University of California and Cooperative Extension. Candidates must provide evidence of continuing achievement at the level required for advancement to Step VI.

Requirements for Full Title, above scale

Except in rare and compelling cases, advancement will not occur after less than four years at Step IX. Advancement to an above-scale salary is reserved for Specialists of the highest distinction whose performance in the extension of knowledge is excellent and shows work has been internationally recognized and acknowledged. Moreover, the mere length of service and continued good performance at Step IX is not a justification for further salary advancement. There must be demonstration of additional merit and distinction beyond the performance on which advancement to step IX was based.

Academic Administrator

The Academic Administrator series does not include ranks. Merit advancements occur in steps within the AA I – VII levels. Academics will be appointed to the appropriate AA I – VII level based upon the responsibilities of the position. The academic administrator title is used for a variety of supervisory and leadership positions; therefore, the position description provides details on expectations and responsibilities (i.e., not every position will be required to meet each of these performance objectives). Progression in step should show a positive trajectory of impact over one's ANR career; see section Career Progression for a high-level overview of how career expectations change over one's career.	
Administrative Performance Duties are largely administrative, but the administration could include participation in overseeing programs involving teaching, research, and academically-based public service.	▪ *Administration of Program*: Provide leadership to an academic and staff team to (a) ensure clientele needs are assessed; (b) priority program goals are developed; (c) programs are implemented; and (d) outcomes and impacts are measured and communicated. Over time, strengthen and expand the delivery of ANR programs. ▪ *Leadership*: Demonstrated ability to share a vision, inspire, and motivate others; ability to encourage and openly explore new ideas and innovative changes and foster positive transformations. Provide evidence of ongoing support to researchers and educators in conducting quality research and extension programs. Demonstrate effective management of personnel, including oversight, annual evaluations, merits, and promotions; and show investment in improving staff expertise and support professional development. ▪ *Budget*: Clearly demonstrate evidence of successfully securing resources, effectively allocating resources, monitoring the use of resources, and reporting to funding agencies. ▪ *Partnerships and Relationships*: Provide evidence for cultivating, maintaining, and nurturing internal UC, political, and industry relationships.
Extending Knowledge and Information/ Applied Research and Creative Activity *If included in position description. Performance in Extending Knowledge and Information: An effective extension program results in new knowledge or understanding, changed attitudes, new skills, or practices. Performance in Applied Research and Creative Activity: (a) An effective research program is characterized by quality and quantity research effort, validation of results, and quality and quantity of research publications and/or reports. (b) An effective program is characterized by the creative adaptation of scientific knowledge or research information to solve specific problems.	▪ Demonstrate the ability to assess program needs and priorities. ▪ Evaluate and/or develop appropriate, innovative methodologies that enhance clientele's knowledge in the program area to the extent possible. ▪ Develop a foundation of high-quality educational programs (e.g., plan and deliver workshops, seminars, field days for clientele; or collaborate in delivering workshops). ▪ Develop research and/or creative activity in a collaborative and team-oriented atmosphere. Work with other UC academic colleagues to develop (write or edit) relevant publications for local clientele and related industries as appropriate (e.g., newsletter for growers/clientele; news articles, web page for the program, or other innovative methodologies).
Professional Competence and Activity Competence in the subject matter appropriate to the discipline is fundamental to individual success and to the success and progress of UC ANR.	▪ Enhance skills and knowledge in assigned program area(s) and acquire additional skills as needed. (e.g., join a professional society and attend a meeting; complete a short course; work with mentors). ▪ Build credibility with clientele. Seek opportunities to attend and participate in clientele/industry/community sponsored functions and establish a clientele network. ▪ Develop professional relationships that may produce long-term and meaningful University contributions.
University and Public Service Services to the local CE unit, ANR, and/or the University at large are a critical part of an academic appointee's responsibilities. Contributions to community and beyond are also expectations of the academic appointment, representing UC and the academic discipline.	▪ Seek opportunities and serve in activities that support ANR. (e.g., volunteer to assist with UC conferences or meetings). ▪ Actively participate in and/or lead UC ANR Program Teams and associated Work Groups.Serve in activities that support the local unit (e.g., county committees). ▪ Serve in public activities (e.g., judge a science fair, serve on committees).
Civil Rights Compliance and Principles of Community Familiarity with and documentation of Civil Rights requirements is a legal requirement of federal fund	▪ Demonstrate understanding and dedication to the Division's civil rights compliance program. As appropriate, identify and define clientele (establishing appropriate baselines) and develop methods to serve them.

recipients. All UC ANR are also expected to adhere to UC ANR Principles of Community.	▪ Demonstrate contributions and activities that foster UC ANR's Principles of Community and develop an environment that maximizes the potential of all participants and employees.

Specialist (non-CE)

	Assistant to Full	Above Scale
Summary	Junior Specialists do not undergo merit review. A candidate for advancement in the Specialist series is evaluated on such criteria as the level of expertise and ability to work independently, professional competence, the complexity of the research responsibilities, the potential for intellectual/scientific contributions to the field, and the scope of professional activities and University and public service.	Advancement to above-scale status is reserved for only the most highly distinguished Specialists.
Performance in research	Specialists must be continuously and effectively engaged in research activity of scholarly quality and significance in the defined area of expertise and specialization. All Specialists are judged on performance in research. Evidence may include one or more of the following: ▪ Letters from collaborators or principal investigators documenting that work performed by the Specialist contributed to published research; ▪ Recognized expertise, including formal documentation of intellectual effort, presentation of research at regional/national meetings, creative contributions to intellectual property (e.g., patents), eligibility to serve as principal investigator, and/or invitations to participate in research projects; ▪ Documentation of effective planning and execution of research projects; ▪ Publications on which the Specialist is an author or that credit the Specialist in the acknowledgment section of the work; and ▪ Active dissemination of information through training, presentations, or other means stemming from the Specialist's research.	▪ Work of sustained and continuing excellence has attained national and international recognition and broad acclaim reflective of its significant impact.
Professional Competence and Activity .	Evidence of professional competence and activity, which is optional for Junior and Assistant Specialists but required for Associate and Full Specialists, may include: ▪ Participation in professional societies or groups and other educational and research organizations; ▪ Service on advisory panels; ▪ Invitations to review research and/or grant proposals; ▪ Review of journal manuscripts and other publications related to the Specialist's area of expertise; and ▪ Additional education and credentials as related to the specialized area of research.	▪ Professional achievement is outstanding.
University and Public Service	Specialists may engage in University and/or public service provided these services comply with the requirements of the candidate's funding source. Such service should be related to the candidate's area of professional expertise and achievement. Service activities may be at the level of the department, the organized research unit (ORU), the college/school/division, the campus, the University, and/or the public. For example, Specialists may serve as a liaison with and respond to the needs of various industry organizations, state and federal agencies, and other external groups on issues related to their area of expertise. At the Junior and Assistant Specialist ranks, University and/or public service may be minimal.	▪ Service is highly meritorious.
Civil Rights Compliance and Principles of Community Familiarity with and documentation of Civil Rights requirements is a legal requirement of federal fund recipients. All UC ANR are also expected to adhere to UC ANR Principles of Community.	▪ Demonstrate understanding and dedication to the Division's civil rights compliance program. As appropriate, identify and define clientele (establishing appropriate baselines) and develop methods to serve them. Demonstrate contributions and activities that foster UC ANR's Principles of Community and develop an environment that maximizes the potential of all participants and employees.	▪ As appropriate, continue to update clientele baseline data and show evidence of program efforts to reach and serve your defined clientele. ▪ Demonstrate contributions and activities that foster UC ANR's Principles of Community and develop an environment that maximizes the potential of all participants and employees.

Academic Coordinator

The Academic Coordinator series does include ranks, but rather levels are determined by program scope and complexity at the time of the position recruitment (Academic Coordinator I, II, and III). Academic Coordinators move through the steps during the merit process, but there is no expectation of movement between the levels without significant changes in the scope and complexity of the program being administered. The academic coordinator title is used for a variety of programmatic positions; therefore, the position description provides details on expectations and priorities (i.e., not every position will be required to emphasize each performance objective). Note: Clientele are often UC employees (i.e., academic coordinators often support the efforts of CE Advisors, Specialists, and staff). Progression in step should show a positive trajectory of impact over one's ANR career; see section Career Progression for a high-level overview of how career expectations change over one's career.	
Coordination of Academic Programs Responsible for the administration and coordination of one or more programs and may have responsibility for directing the activities of other academic appointees or staff.	Describe activities listed below according to UC APM 375; additional efforts depend on position description: ▪ Academic program planning and development o Demonstrate the ability to develop and sustain relationships with program clientele and partners. o Lead and contribute to effective communication efforts with one's clientele and the public (e.g., develop and maintain websites, social media, blogs, and other media). o Develop, adapt, implement, and evaluate program activities, training, curriculum, and other educational activities and multimedia materials aligned with the strategic plan and/or clientele needs. o Provide evidence of coordination and organization of various elements involved in complex academic programs to ensure effective outcomes and impact (i.e., ranging from logistical to program content). ▪ Assessment of program and constituency needs. o Demonstrate ability to assess program needs and priorities. ▪ Evaluation of academic program activities and functions. o Demonstrate ability to develop, contribute to, and publish evaluation reports. ▪ Development of proposals for extramural funding of programs and identification of support resources. ▪ Liaison representation with other agencies and institutions in the public and private sectors. ▪ Supervision and leadership of other academic appointees or staff.
Professional Competence and Activity Competence in the subject matter appropriate to the discipline is fundamental to individual success and to the success and progress of UC ANR.	▪ Enhance skills and knowledge in assigned program area(s) and acquire additional skills as needed. (e.g., join a professional society and attend a meeting, complete a short course, work with mentors). ▪ Build credibility with clientele. Seek opportunities to attend and participate in clientele/industry/community-sponsored functions and establish a clientele network. ▪ Develop professional relationships that may produce long-term and meaningful University contributions. ▪ Provide intellectual leadership and scholarship to programs (e.g., presenting at professional society conferences, published abstracts, invited presentations, reviewing/editing publications and grant applications, contributions to a variety of reports and publications). ▪
University and Public Service Services to the local CE unit, ANR, and/or the University at large are a critical part of an academic appointee's responsibilities. Contributions to the community and beyond are also expected of the academic appointee, representing UC and the academic discipline.	▪ Serve in activities that support and/or represent ANR, the broader UC community, or other academic entities. (e.g., academic search committees, Academic Assembly Council committees, Statewide program advisory committees/councils, conference planning committees, industry and government-related committees that serve local needs). ▪ Actively participate in and/or lead UC ANR Program Teams and associated Work Groups.Serve in activities and/or committees that support the local unit, ANR-wide, or nationally. ▪ Serve in public activities (e.g., judge a science fair, serve on committees) related to the professional's content area assignment.

Civil Rights Compliance and Principles of Community Familiarity with and documentation of Civil Rights requirements is a legal requirement of federal fund recipients. All UC ANR are also expected to adhere to UC ANR Principles of Community.	Demonstrate understanding and dedication to the Division's civil rights compliance program. As appropriate, identify and define clientele (establishing appropriate baselines) and develop methods to serve them. Demonstrate contributions and activities that foster UC ANR's Principles of Community and develop an environment that maximizes the potential of all participants and employees.