

Guidelines for Preparing Your

ACADEMIC COORDINATOR or ADMINISTRATOR ANNUAL EVALUATION

2009



DIVISION OF AGRICULTURE & NATURAL RESOURCES

University of California Cooperative Extension



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INTRODUCTION

The information in this booklet pertains to the Annual Evaluation (AE) for Academic Coordinator/Administrators. For information on the AE for Advisors, please refer to the Guidelines for Preparing your Advisor Annual Evaluation Guidelines.

For information on Merit and Program Reviews please refer to the [*E-Book, Academic Coordinator/Administrator Guidelines for Preparing the Dossier for Electronic Submission*](#)".

The Annual Evaluation assesses the candidate's annual activities and provides the County Director (CD) or Program Director (PD) and/or Regional Director (RD) with an update on accomplishments and program direction.

Submission of the Annual Evaluation is mandatory unless an Advisor/Coordinator or Administrator is submitting a Program Review. An academic may defer an AE if he/she is on sick leave, family leave or on sabbatical leave.

A timeline describing the reporting periods for the Annual Evaluation, Streamlined Merit and Program Review is in Appendix C.

The AE should include evidence of the past year's activities, accomplishments, impacts, and professional stature commensurate with a specific academic rank. Performance expectations for Academic Coordinators and Administrators are in Appendix A.

There are two templates for Annual Evaluations:

- One for Advisors and/or County Directors.
- One for Academic Coordinators or Academic Administrators.

CE Specialist who are not assigned to a campus should complete the template for advisors.

ANNUAL EVALUATION DIRECTIONS

Key considerations for the development of your AE include:

- Be brief and concise.
- Limit your AE, Section A to 8 pages (excluding tables in Section B)
- The bibliography should cover only those publications developed during the period under review.
- You have the option of using DANRIS-X to generate information to copy and paste to your AE, Section B.

There are 3 steps for the Academic Coordinator/Administrator to complete the AE process, and one step for their immediate supervisor:

Step	Description	Who
1	Upload the current approved Position Description (s). If your Position Description has not changed since the most recent review then there is no need to upload it.	Candidate
2	Upload the completed Annual Evaluation Sections A-B. This section is reviewed by the Supervisor and the RD	Candidate
3	Upload the completed Annual Evaluation Section C This section is reviewed only by the Supervisor, unless you grant other administrators the opportunity to review this section. (See Section C confidentiality instructions)	Candidate
4	Supervisor or RD uploads Section D	CD, Supervisor, RD

ELEMENTS OF THE ANNUAL EVALUATION

Position Description. Upload your current position description (PD). If your PD has not changed since your last AE, there is no need to upload it again.

SECTION A: NARRATIVE (Limit 8 pages, 11 or 12 pt. font)

General Performance and Accomplishments:

I. STATEMENT OF ASSIGNMENT

- Changes in responsibilities (if applicable)
- Programmatic Assignment of FTE (if applicable)

II. COORDINATION OF ACADEMIC PROGRAMS/ADMINISTRATIVE PERFORMANCE

- Describe major themes and goals of your programs and your accomplishments in meeting last year's goals.

Describe major administrative activities in the following areas:

- Academic program planning and development.
- Assessment of program and constituency needs.
- Evaluation of academic program activities and functions.
- Development of proposals for extramural funding of campus 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.

III. AFFIRMATIVE ACTION

- Summarize affirmative action outreach and accomplishments.

SECTION B-TABLES AND APPENDICES (no page limit, 11-12 pt. font)

(can be retrieved from DANRIS-X if applicable)

I. PROFESSIONAL COMPETENCE AND ACTIVITY

- List activities you have undertaken to improve your professional competence
- List disciplinary societies/professional associations (organization name, your role)
- List awards, honors or recognition

II. UNIVERSITY AND PUBLIC SERVICE (county/local program, regional, state)

- List university service activities
- List public service activities

III. GRANT AND PROGRAM SUPPORT SUMMARY LIST (optional)

Title	Collaborators	Funding Source	Duration	Amount

IV. EXTENSION ACTIVITIES (optional)

a. Meetings Organized (Classes/Short Courses/Demonstrations/Field Days/Other)

Begin Date-End Date	Meeting Name & Organizer	Presentation Topic/no. of repetitions	Location(s)	Tot. No. Attendees

b. Educational Presentations (including oral presentations and posters)

Begin Date-End Date	Meeting Name & Organizer	Presentation Topic/no. of repetitions	Location(s)	Tot. No. Attendees

c. Other (including news media interviews- DANRIS-X “Other)

Begin Date-End Date	Meeting Name & Organizer	Presentation Topic/no. of repetitions	Location(s)	Tot. No. of Attendees

V. BIBLIOGRAPHY

Publication Type Code	Bibliographic Citation

The bibliography shall include only those publications developed during the year in review.

Categorize the publications using the system described below:

- A = Popular articles, newsletter stories, UC Delivers. These are targeted at the clientele and/or layperson. (These include newspaper articles, trade journals, magazines and web-sites).
- B = Peer-reviewed scholarly journal. (A type of periodical that contains articles written by researchers and experts in a specific discipline aimed at other researchers in a particular field. An article in a scholarly journal is usually documented with footnotes and/or a bibliography. For the most part, scholarly journals are published monthly or quarterly and contain little advertising).

- C = Other peer-reviewed articles, publications. (A peer-review involves a blind review of your work and a refereed editorial process (with possibility of rejection) leading to publication. Examples include but are not limited to California Agriculture and ANR Publications).
- D = Technical reports and articles (Report to funding agencies, commodity groups; article in conference proceedings, workshop/training materials).
- E = Abstracts (Abstracts are limited in terms of the number of words and do not include footnotes or a bibliography. Examples are poster or presentation abstracts).

Please Note: This categorization system does not convey importance of one category over another. Categorization enables the administration to summarize information for federal reporting purposes and provides useful information to subsequent reviewers. Clientele-targeted information is encouraged and is highly valued by Administration.

SECTION C: NARRATIVE (no page limit, 11-12 pt. font)

Provide a brief description of goals and a general self-assessment. This section is your opportunity to evaluate your accomplishments and formulate goals for the next program year.

I. SELF-ASSESSMENT OF PROGRAM

- Evaluate your administrative accomplishments.
- Assess the effectiveness of your relationships with ANR colleagues, supervisors, administrators and external clientele.
- Assess your record in providing reports and other measures of accomplishment, complying with University policies, contributing your share to “carrying the load” in office and team activities).

II. BARRIERS/OBSTACLES IN ACCOMPLISHING YOUR PROGRAM GOALS

III. GOALS FOR COMING YEAR: October 1, 2009-September 30, 2010

- Projects you intend to accomplish in the coming year, anticipated collaborators and anticipated outcomes
- What needs to be accomplished to advance in Step or Title?

Your supervisor will discuss his/her evaluation of your performance with you. You will see a section on the lower bottom of your screen that asks you to check a box to indicate that you discussed your Annual Evaluation with your supervisor.

Below the signature box, the following sentence appears:

If you disagree with the evaluation, or with any part thereof, you may upload comments as a separate document on the web by March 1, 2010.

ANNUAL EVALUATION ADMINISTRATIVE REVIEW

The AE is reviewed by both the Supervisor and the next level Supervisor. There are 3 components of the administrative review which are shown as Section C in the AE template:

1. Your immediate Supervisor provides an appraisal of your program. This appraisal should address your performance in terms of balance and productivity and provide comments and constructive guidance to you. The Supervisor will assess your annual evaluation and respond to the following comments:
 - Indicate the areas in which the Supervisor believes that the Academic Coordinator/Administrator is meeting expectations for his/her level in each of the four advancement criteria.
 - Indicate areas of concern and suggestions for improvement.
 - What needs to be accomplished to advance in Step or Title?
 - Indicate whether or not you approve of the Academic Coordinator/Administrator's goals; if not, how should they be revised?
2. The Supervisor will provide an assessment of your progress in terms of balance and productivity for your rank and step and your progress toward advancement to the next rank and step. The Supervisor will discuss with you his/her assessment of your performance. The Supervisor will select one of the following assessment statements.
 - Meets levels of expected program excellence
 - Deficient in expected levels of program excellence
3. The next level supervisor or Assistant Vice President of Programs reviews AE sections A and B as well as the Supervisor appraisal and assessment (Section C) and acknowledges that the review has been completed by checking a box.

ANNUAL EVALUATION QUESTIONS

Question: *Should the bibliography cover my entire career?*

Answer: No. Include only those publications that were developed during the year covered by the AE. When you seek a streamlined merit, merit or a promotion your bibliography will include all publications in your career.

Question: *Am I required to download information from DANRIS-X?*

Answer: You are not required to use DANRIS-X. However, Section B Tables and Appendices can be easily retrieved from DANRIS-X.

Question: *Can I defer submission of an annual evaluation?*

No. You cannot defer the submission of an AE.

Question: *Do I have to submit an AE if I have been an Academic Coordinator or Administrator less than 6 months?*

No. Only academic appointees that have served for six months or more are required to submit an AE.

Appendix A: Criteria for Evaluating the Performance of Academic Coordinators

The Academic Coordinator and Academic Administrator series are used for academic appointees whose main roles are to administer academically based public service programs. The primary duties of the positions in these series are in administration rather than in teaching or in research. (See APM-370 and APM-375 for additional information on these series).

Academic Coordinator Level

Academic Coordinator I

This level is intended for individuals with responsibility for programs of minimal to moderate complexity. Such programs can be administered with a small staff, or they may consist primarily of local University-related activities with limited breadth or narrow focus. The administration of the program at this level will normally involve outside agencies or industries only when necessitated by the targeted needs or interests of a University-based clientele. The Academic Coordinator I will typically receive general supervision by a department chair, a faculty member, or other academic or professional staff member. The duties of an appointee may include limited involvement in the generation and/or coordination of funds.

Academic Coordinator II

This level is reserved for individuals with responsibility for programs of moderate complexity. The duties of an appointee may include the independent coordination of a program with a moderately-sized staff or, in a small organization, a scope that encompasses several departments, schools, or colleges of the campus, or a series of affiliated academic, governmental, or private institutions. The Academic Coordinator II is expected to manage the program with a great amount of independence and may receive general guidance from a faculty member, a department chair, an assistant/associate dean, or equivalent positions. Duties may include moderate involvement in the generation and/or coordination of funds from different sources.

Academic Coordinator III

This level is reserved for appointees who have primary responsibility for the administration, management, and coordination of large programs with broad and substantial complexity and who fulfill their responsibilities independently. These appointees might be unit heads who report directly to deans or vice chancellors. Their responsibilities may include the direction and supervision of a large staff and/or administration of a program with a broad, interdisciplinary scope that encompasses several colleges or schools within the campus, other UC campuses, or public and private

agencies outside of the University. The duties of an appointee at this level may include extensive involvement in the generation and/or coordination of funds. Appointment to this level will require demonstrated superior professional ability, outstanding accomplishment in job-related activities, and the assumption of greater responsibility than typically delegated to Academic Coordinators at other levels. Appointment to this level may require demonstrated scholarly ability and attainment, depending on the duties of the position.

Coordination of Academic Programs

In most instances, Academic Coordinators will have primary responsibility for the administration and coordination of one or more programs and may have responsibility for directing the activities of other academic appointees or staff.

Types of activities:

- (1) Academic program planning and development.
- (2) Assessment of program and constituency needs.
- (3) Evaluation of academic program activities 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.

2. Professional Competence

Academic Coordinators will provide intellectual leadership and scholarship to their programs.

3. University and Public Service

Academic Coordinators participate in the administration of their assigned units and the University through appropriate roles in governance and policy formulation. In addition, they may represent the University in their special capacity as scholars during the discharge of their responsibilities.

Appendix B: Criteria for Evaluating the Performance of Academic Administrators

The academic administrator series is used principally in organized activities other than organized research units for appointees who administer programs which (a) provide service to academic departments, but not as totally or exclusively research or teaching activities or (b) are intended to serve the general public and may be either research or education in nature. (*Refer to APM 370 for academic administrator criteria*)

Appointment to the series may be at any one of seven titles, i.e., Academic Administrator I through VII.

Merit increases are based on materials submitted in support of an appointment, merit increase, or a change in level that shall provide a comprehensive assessment of the candidate's qualifications and performance in the areas specified below. A position description must be provided, along with an explanation of the candidate's role in the program and within a larger unit, if appropriate. The three evaluation criteria are:

Appendix C. TIMELINE FOR ANNUAL EVALUATION

Action	Due Date	Includes
Annual Evaluation (AE) (Advisor, Acad. Coord., Administrator)	November 17, 2009	October 1, 2008 – September 30, 2009
County Director/First Level supervisor review of AE	December 17, 2009	Meeting with Academic Coordinator/Administrator and completion of Section C of AE.
Review of AE by next-level Supervisor	January 22, 2010	Next-level Supervisor confirms review of AE.