

## Academic Coordinator File Guidelines September 2003

### C. Change in Level files

"There is no expectation of movement between the levels without significant changes in the scope and complexity of the program being administered." (APM 375-19-c) When a significant change in scope and complexity of the program being administered occurs, a change in level file may be warranted.

Materials must provide a comprehensive assessment of qualifications and performance in the areas of Coordination of Academic Programs, Professional Competence, and University and Public Service (see Merit and Performance Review section for elaboration) as well as a full explanation of the change in scope and complexity of the responsibilities driving the proposed change in level.

Letters of evaluation should be solicited from unit constituents or professional colleagues who have a basis for evaluating the program's effectiveness, the candidate's performance in the administration and coordination of programs for which (s)he is responsible, and/or the contributions of intellectual leadership and scholarship, where applicable. Evaluators may also address the changed role and responsibilities of the candidate.

#### Change in Level File Contents:

1. Academic Coordinator Criteria Change in Level Form
1. Departmental recommendation
2. Letters of Evaluation
3. Self-statement
4. Explanation of:
  - a. candidate's role in program and unit
  - b. change in responsibilities
  - c. designation of supervisor
5. New Job description and organization chart
6. Old Job description and organization chart
6. Biography form
7. Curriculum vitae
8. University and public service
9. Procedural safeguard statement
10. Checklist of documents
11. Other

### D. Reappointment recommendation

"A performance review shall precede any reappointment." (APM 375-19-d)

Since a review is required prior to reappointment, a reappointment recommendation should accompany a merit, change in level or performance review file.

The recommendation for reappointment should be contained in a separate document detailing the following:

- a. vote and discussion
- b. term of reappointment
- c. % FTE
- d. funding source and stability

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### A. Appointment Files

"Academic Coordinator titles are for appointees who administer academic programs that provide service closely related to the teaching or research mission of the University. This service may be provided to academic departments, to students, or to the general public. ... While the program overseen by an Academic Coordinator need not be departmentally-based, the program must be fundamentally academic in nature, involving University research activities or activities requiring judgments relating to University instruction. ... The duties of an Academic Coordinator are primarily administrative. Individuals in an Academic Coordinator title who are assigned research or instructional duties are required to hold a dual title. However, Academic Coordinators may conduct occasional non-credit seminars or workshops without holding a faculty title." (excerpts from APM 375-4)

An appointee must have a professional background of academic training and/or experience. Professional accomplishment and scholarly contributions may also be required. A Master's or equivalent or other appropriate degree(s) may be required. Certain positions may require a doctorate or equivalent experience.

There are three levels of Academic Coordinator positions. Determination of the appropriate appointment level shall take into consideration the following factors:

1. Program complexity, i.e., size and/or scope of the program for which the appointee is responsible
2. Degrees of independence and reporting relationship
3. Budgetary activities, i.e., degree of involvement in either generating or coordinating funds
4. Degree of professional accomplishment or scholarly contribution needed to discharge responsibilities
5. Impact on campus mission

#### Appointment File Contents:

1. Departmental (or committee, as applicable) recommendation with votes. The recommendation letter must specify the proposed appointment level and step in the Academic Coordinator Title Series, the term of appointment, % FTE, pay basis (academic year or fiscal year), and an explanation of funding sources and funding stability for the position.
2. Academic Coordinator Criteria Appointment Form, including a comprehensive assessment of the candidate's qualifications and responsibilities
3. Explanation of candidate's role in program and unit
4. Job description
5. Organizational chart displaying reporting relationships
6. Designation of supervisor
6. UC Biography form
7. Curriculum vitae
8. Letters of recommendation
9. Checklist of documents
10. Other

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### **B. Merit and Performance Review files**

Merit increases are based on administrative performance, professional competence and activity, and University and public service. Professional accomplishment and scholarly achievement should also be considered, if required by the position.

Materials must provide a comprehensive assessment of qualifications and performance in the following areas:

- a. Coordination of Academic Programs  
Assess the candidate's performance in administrative activities such as academic program planning, development and execution; budgetary oversight and resource development; program effectiveness; program evaluation; policy formulation; supervision skills; and liaison representation with other agencies, institutions or constituencies.
- b. Professional Competence  
Evaluate the extent to which the candidate provides intellectual leadership and scholarship to the program.
- c. University and Public Service  
Appraise the candidate's participation in and contributions to University and public service.

Letters of evaluation should be solicited from unit constituents or professional colleagues who have a basis for evaluating the program's effectiveness, the candidate's performance in the administration and coordination of programs for which (s)he is responsible, and/or contributions of intellectual leadership and scholarship, where applicable.

#### Merit or Performance Review File Contents:

1. Departmental recommendation including a vote.  
The recommendation should specify a step in the case of a merit. For a performance review, the recommendation is for a "Satisfactory" or "Not satisfactory" outcome.
2. Letters of evaluation
3. Self-statement
4. Explanation of candidate's role in program and unit
5. Job description
6. Biography form
7. Curriculum vitae
8. University and public service
9. Procedural safeguard statement
10. Checklist of documents
11. Other

Note: "Individuals in an Academic Coordinator title who are assigned research or instructional duties are required to hold a dual title." (see APM 375-4d) Therefore teaching and research activities should be evaluated under the appropriate dual title. However, it is recognized that some persons will "insist", however inappropriately, that these items be listed in their Academic Coordinator file. (For example this may occur if the dual title is a without salary title for which no merits are given such as Lecturer without salary, for teaching, or Project Scientist without salary, for research). The candidate is allowed to include such information in the "Other" section, however (s)he is to be advised by his/her supervisor that the file will be evaluated solely on the criteria for the Academic Coordinator position.