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**Academic Employee Evaluation & Reporting Processes**

ANR academics are required to be evaluated and submit reporting annually.

There are three distinct processes, each a separate requirement.

[***Project Board***](https://projectboard.ucanr.edu/)*: Integrated with Workflow Automation* (WFA) to submit annual evaluation or program review.

[***Project Board***](https://projectboard.ucanr.edu/)*:* ANR's online system that integrates civil rights compliance and organizational reporting requirements. It also has an optional component to help academics organize information for program review and annual evaluation.

**Organizational Reporting and Civil Rights Compliance (due December 8)**

ANR academics are expected to complete reporting for accountability, to meet federal requirements, as well as for advocacy purposes including the annual report, impact stories, and county reports.

***Submitted in*** [***Project Board***](https://projectboard.ucanr.edu/)

* program outcomes and impacts (reported in Project Board – Themes)
* review and update clientele group(s) baseline (updated in Project Board – Clientele)
* Extension activities and contacts (reported in Project Board – Activities)
* All reasonable efforts (reported in Project Board – Activities)

*Optional Project Board Features:* Complete only if you are using the export for PR dossier, because this data is not used for organizational reporting - University/Public service activities; Evidence of professional competence activities; and Extension Activity Delivered by Your Staff/Volunteers.

***Submitted in ANR Portal Profile***

* publications (reported in ANR Portal Profile – Bibliography). Include publications developed during the time period covered in this annual evaluation year.

***Help Sheets***

* [4-H Youth Development Academics](https://drive.google.com/file/d/1RwENPKN67ig1uGVL_NBw9KLRUPsZYElf/view?usp=sharing)
* [Nutrition, Family, and Consumer Science Academics](https://drive.google.com/file/d/1snaZFoo4EeOq_RQLHVYHygsN0k9uWaAq/view?usp=sharing)
* [Checklist for all other academics (e.g., Agriculture, Natural Resources, Pest Management)](https://drive.google.com/file/d/1hDNDTbjrN2D-cLUMDF__kKxohF7ez6Ns/view?usp=sharing)

**FTE Reporting (due July 1)**

FTE reporting is required and used in accountability, advocacy, and resource planning efforts. Reporting is submitted in [Project Board](https://projectboard.ucanr.edu/) and consists of the following data: (a) planned multi-state FTE, (b) condition change FTE for the state fiscal year that is ending, and (c) multi-county FTE split for state fiscal year that is ending.

**Program Review and Annual Evaluation (due December 9)**

*All academic appointees are evaluated by their immediate and secondary supervisor (if applicable) on an annual basis, except for years in which the appointee seeks advancement by submitting a program review dossier.*

**Example Timeline for Annual Evaluations and Program Reviews**

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| **YEAR 1 YEAR 2 YEAR 3 YEAR 4 YEAR 5** |
| **Example for academic with 2 year normal progression (e.g., CE Advisor Assistant, Acad. Coord. II)**    **Time**  **Advancement (Program Review)**  **Annual Evaluation**  **Advancement (Program Review)**  **Annual Evaluation**  **Annual Evaluation** |
| **Example for academic with 3 year normal progression (e.g., CE Advisor Full Title, Acad. Coord. III)**    **Time**  **Advancement (Program Review)**  **Annual Evaluation**  **Annual Evaluation**  **Annual Evaluation**  **Advancement (Program Review)** |

**Seek more information**

[**Learning & Development: Academics Performance Evaluation**](https://ucanr.edu/sites/Professional_Development/Office_-_Team_Management/Performance_Evaluation/?editon=1#Academics)

[**Project Board Help**](https://ucanr.edu/sites/ProjectBoardHelp/)

[**Academic Human Resources**](https://ucanr.edu/sites/anrstaff/Personnel_Benefits/Academic_Personnel/PR_Dossier_Examples/)