

**COLLEGE OF AGRICULTURE, LIFE AND
ENVIRONMENTAL SCIENCES
GUIDELINES AND CRITERIA FOR PROMOTION
AND CONTINUING STATUS
FOR COOPERATIVE EXTENSION SPECIALISTS**

Revised March 1, 2014

University of Arizona College of Agriculture, Life and Environmental Sciences Cooperative Extension Specialists extend the people of Arizona through a variety of outreach, educational, and applied research programs. Extension integrates teaching, issue-driven research, and creative activity for engaged outreach that ultimately leads to a change in behaviors or conditions. They perform a vital role in the three primary functions of a land-grant university: teaching, research, and extension. Criteria are listed below for each Extension Specialist rank.

In the College of Agriculture, Life and Environmental Sciences (CALES), each faculty member has a position description and updated as appropriate and which reflects the relative responsibilities assigned to teaching, research, extension, and service activities in relationship to the unit's mission and strategic plan. This position description provides the context for evaluating a candidate's success in meeting performance expectations for promotion and/or continuing status.

Both formal and non-formal instruction are defined as teaching by CALES, including classroom sessions, demonstrations, workshops, field days, and online learning. Research/creative activities may be basic and/or applied and may include the use of innovative approaches and new technology. (See Appendix A for examples of specific activities in each area.) Cooperative Extension programs involve information delivery, educational programming, and problem-solving research or creative approaches to problems.

Specialists are expected to demonstrate professional competence and growth as determined by standards of achievement in the following pages. The Extension Specialist is a primary source for knowledge and technical information in his/her discipline. Extension Specialists provide statewide program leadership and work collaboratively through research, training, appropriate direct teaching of clientele, and interpreting, assembling, and preparing educational materials. Extension Specialists are expected to work collaboratively with faculty in the College of Agriculture, Life and Environmental Sciences, other colleges at the University of Arizona, and professionals at other universities, agencies, organizations, and institutions at the county, state, regional, and national levels as appropriate for their rank and discipline.

In furthering the Extension mission, faculty are expected to develop innovative and progressive programs that meet clientele and community needs and relate to the University of Arizona and CALES strategic plans. The work of an Extension Specialist focuses on program development, implementation, and assessment; scholarship and creative activity; and professionalism. The requirement of excellent performance and the promise of continued excellence necessary for the granting of promotion and/or continuing status include compliance with relevant university and Arizona Board of Regents policies. The University Handbook for Appointed Personnel (UHAP) (<http://uhap.web.arizona.edu/>) provides more information on the promotion and continuing status process. For purposes of review, promotion, and continuing appointment, all of these performance indicators are evaluated by peers, supervisors, and Extension administration. When work that is the product of joint effort is presented as evidence of scholarship, clarification of the candidate's role in the joint effort should be provided in the dossier with a complete citation.

STANDARDS OF ACHIEVEMENT FOR UA CALES EXTENSION SPECIALIST

1) PROGRAM DEVELOPMENT, IMPLEMENTATION, AND ASSESSMENT

A variety of peer and clientele inputs are used to determine the content, priority, and emphasis of the Extension Specialist's programmatic leadership. Program planning reflects the assimilation and synthesis of information from needs assessment, clientele organizations, and key industry leaders relative to the strategic plans of Cooperative Extension and the College of Agriculture, Life and Environmental Sciences. Program content is based on relevant research and current knowledge. Extension Specialists participate in single, multi-, and inter-disciplinary programming efforts to address priority issues of the clientele. Extension Specialists seek financial, material, and human support to extend program effectiveness. They use a variety of resources and creative and innovative methods and technologies to foster quality learning. Program design and delivery include a comprehensive educational plan, implementation, and evaluation. Specialists use appropriate evaluation tools and techniques to review and enhance educational design and delivery and to assess outcomes and impacts.

ASSISTANT (important for 3-year review)	ASSOCIATE (assistant + associate standards)	FULL (assistant + associate + full standards)
<p><u><i>Criteria for Development</i></u></p> <ul style="list-style-type: none"> • Works cooperatively with faculty from the university, professionals within the discipline from other agencies and organizations within the state and region in applied research, problem solving, discovering new knowledge, and delivering educational programs. • Studies, analyzes, and interprets conditions, trends, and research at state and regional levels to identify major and potential issues. <p><u><i>Criteria for Implementation</i></u></p> <ul style="list-style-type: none"> • Provides leadership and innovative ideas to faculty statewide in the implementation of effective educational programs which address current high priority problems of clientele. • Conducts problem-solving research to provide relevant technical support to address priority issues. • Disseminates educational materials through statewide events, workshops, electronic communication methods, newsletters, and other methods. • Prepares educational materials, evaluation instruments, teaching materials, and publicity information in support of state and regional initiatives. • Communicates program results to both professional peers and clientele through periodic reports, scholarly works, and various types of publications, including computer programs, popular articles, bulletins, and scientific articles. <p><u><i>Criteria for Assessment</i></u></p> <ul style="list-style-type: none"> • Develops evaluation procedures and methods that document achievement of program objectives. 	<p>All of the criteria for the Assistant Specialist AND the following:</p> <ul style="list-style-type: none"> • Expands programming to regional and national levels. • Expands clientele to regional and national levels. • Expands collaborations to regional and national levels. • Expands dissemination efforts to region and nation. • Modifies programs based on clientele needs. 	<p>All the criteria for the Associate Specialist AND the following:</p> <ul style="list-style-type: none"> • Continues to develop and adapt programs for local, state, regional, national, and, where appropriate, international audiences. • Provides evidence that their programs have contributed to their professional discipline beyond the Southwest region. • Seeks international collaborations if appropriate.

2) SCHOLARSHIP AND CREATIVE ACTIVITY

Scholarship is intellectual work that is validated by peers and communicated. It includes discovery, teaching, integration, and application of knowledge. See Appendix A for examples of activities appropriate for Scholarship. Creative Activity is development of new technologies, materials, methods, or educational approaches to address an identified problem or need. Examples are listed in Appendix A. Creative works are demonstrated by designing and executing curriculum or programming, use of materials by peers, clients, or other professionals and peer recognition for contributions. In order to be considered peer-reviewed, a publication or other scholarly work must be evaluated by a university, college, association, or other organizational peer-review process.

ASSISTANT (important for 3-year review)	ASSOCIATE (assistant + associate standards)	FULL (assistant + associate + full standards)
<ul style="list-style-type: none">• Secures support and manages resources for research-based Extension education programs.• Prepares publications, scholarly works, and creative activities as appropriate for the information, educational objectives, and audiences.• Disseminates scholarly contributions using a variety of methods to appropriate audiences.	All of the criteria for the Assistant Specialist AND the following: <ul style="list-style-type: none">• Continues to prepare and disseminate scholarly and creative works for state, regional, and national audiences.• Secures acknowledgement for their work.	All the criteria for the Associate Specialist AND the following: <ul style="list-style-type: none">• Continues to prepare and disseminate scholarly and creative works for state, regional, national, and, where appropriate, for international audiences.• Secures grants to support programs.• Receives awards in recognition of program excellence.

3) PROFESSIONALISM

Extension Specialists show evidence of professional development by continued learning and interaction. Each specialist is expected to advance professionally through formal and non-formal educational opportunities. Examples of Service activities are listed in Appendix A.

ASSISTANT (important for 3-year review)	ASSOCIATE (assistant + associate standards)	FULL (assistant + associate + full standards)
<ul style="list-style-type: none">• Maintains professional competence through study, participation in professional activities, and the application of knowledge and skills on the job.• Promotes public understanding and support for Extension and university programs.	All of the criteria for the Assistant Specialist AND the following: <ul style="list-style-type: none">• Expands competencies in area of program responsibility through informal and/or formal educational opportunities.• Serves on committees for Extension, the department, college, university, and professional organizations.	All the criteria for the Associate Specialist AND the following: <ul style="list-style-type: none">• Serves at high levels of leadership in Extension, the department, college, university, and professional organizations.• Receives invitations to review and evaluate materials from colleagues from other institutions.

4) TEACHING (Optional)

Some Extension Specialists have a formalized teaching assignment. Examples of Teaching/Resident Instruction activities are listed in Appendix A.

Only in the rarest of circumstances will an assistant specialist that is being reviewed for promotion and continuing appointment have a formalized teaching assignment.

ASSISTANT (important for 3-year review)	ASSOCIATE (assistant + associate standards)	FULL (assistant + associate + full standards)
<ul style="list-style-type: none">• See Appendix A for examples of specific activities in each area.• Both formal and non-formal instruction are defined as teaching by CALES, including classroom sessions, demonstrations, workshops, field days, and online learning. Research/creative activities may be basic and/or applied and may include the use of innovative approaches and new technology.• Cooperative Extension programs involve information delivery, educational programming, and problem-solving research or creative approaches to problems.	<ul style="list-style-type: none">• See University of Arizona P&T criteria by rank at http://facultyaffairs.arizona.edu/sites/default/files/Appendix_B_sample.pdf	<ul style="list-style-type: none">• See University of Arizona P&T criteria by rank at http://facultyaffairs.arizona.edu/sites/default/files/Appendix_B_sample.pdf

APPENDIX A
EXAMPLES OF ACTIVITIES USED IN EVALUATING
UA CALES COOPERATIVE EXTENSION PERSONNEL FOR PROMOTION AND CONTINUING STATUS

To be used in conjunction with the *Guidelines and Criteria for Promotion and Continuing Status for Cooperative Extension Specialists* criteria. The following lists of examples are not intended to be exhaustive, inclusive, or rank-ordered.

TEACHING AND ENGAGED OUTREACH (including non-resident instruction)

(Extension personnel are expected to teach stakeholders and the teaching is aligned with their research and creative activities.)

- Clinical teaching/independent study/tutorials, developing curricula
- Coordinating a multi-faceted course
- Developing and applying educational innovations
- Developing course materials
- Developing distributed education offerings
- Developing new courses/labs
- Developing replicable systems of instruction (e.g., designing TA-assisted courses)
- Implementing innovative technology for instruction
- Mentoring interns and volunteers
- Producing/delivering management seminars and technical manuals for stakeholders
- Providing and conducting suitable demonstrations of new ideas and/or new research
- Supervising independent study, graduate and undergraduate research
- Teaching in non-formal venues, including workshops, seminars, and field days

Effectiveness of these activities is measured in diverse ways by diverse sources.

ISSUE-DRIVEN RESEARCH AND CREATIVE ACTIVITIES (SCHOLARSHIP)

- Books, chapters in books, editing books, special issues
- Clinical research in progress
- Grants, contracts, in-kind donations, especially through peer-reviewed proposals
- Invited/contributed papers
- Maps
- Monographs, technical reports, etc.
- Needs assessment and prioritization
- Patents and technology transfer
- Placement of work in museums
- Posters and other creative displays
- Producing deliverable systems
- Publications, peer-reviewed and peer-validated, including electronic material
- Refereed journal articles, abstracts
- Software/media
- Trade and popular press publications

Effectiveness of these activities is measured in diverse ways by diverse sources.

TEACHING/RESIDENT INSTRUCTION (if in Appointment Percentage)

(Source: <http://ag.arizona.edu/dean/ptcappendixa.html>)

- Clinical teaching/independent study/tutorials, developing curricula
- Coordinating a multi-faceted course
- Developing and applying educational innovations in and out of the classroom
- Developing course materials
- Developing distributed education offerings
- Developing new courses/labs
- Developing replicable systems of instruction (e.g., designing TA-assisted courses)
- Implementing innovative technology for instruction
- Providing meaningful feedback to students and volunteers on their work
- Providing professional development to community groups
- Supervising independent study, graduate and undergraduate research
- Supervising interns and internships
- Teaching laboratory and/or field-based courses or sections of courses
- Teaching regular course offerings

Advising

- Advising about career planning
- Advising about clinical training programs
- Advising community groups
- Advising/mentoring graduate students
- Advising student groups
- Advising undergraduate students on programs of study
- Designing/developing courses to be taught using distributed techniques
- Mentoring undergraduate students
- Participating in student recruitment, orientation and retention activities
- Serving on master's or doctoral committees
- Supporting, advising, mentoring Cooperative Extension volunteers

SERVICE ACTIVITIES

Faculty Service

- Administrative assignments
- Chairing of any committee (student, faculty, etc.)
- Serving as a sponsor for student activities and/or groups, volunteer organizations affiliated with Cooperative Extension
- Serving in the Faculty Senate
- Serving on unit, college, and/or university committees

Professional Service

- Activity in professional organizations
- Consulting to organizations/corporations, universities/colleges, etc.
- Editing journals, books, and other manuscripts
- Organizing conferences, symposia, and other meetings
- Serving on committees for federal and state government agencies or on boards

Public or Community Service/Outreach

- Applying one's academic expertise in the local, state, regional, or national community
 - Participating in local, state, regional, or national civic activities and organizations
 - Working with elected officials, policy makers and organizations
-