

**Texas A&M AgriLife Extension Service**

**Professional Career Ladder System**

**for**

**EXTENSION PROGRAM SPECIALISTS**

**2019 GUIDELINES**

## Table of Contents

I.	Introduction.....	1
II.	Overview of Promotion Qualifications and Timeline.....	1
III.	Specific Titles for Extension Program Specialists.....	3
IV.	Basis for Evaluation .....	3
	A. Program Development and Implementation.....	4
	B. Outcomes of Programs .....	4
	C. Faculty/Staff Training and Assistance .....	5
	D. Support of Extension Activities .....	5
	E. Coordination and Cooperation .....	5
	F. Professionalism and Service .....	6
	G. Additional Responsibilities .....	6
V.	Standards of Achievement .....	6
	A. Extension Program Specialist I.....	6
	B. Extension Program Specialist II.....	8
	C. Extension Program Specialist III.....	10
	D. Senior Extension Program Specialist.....	12
VI.	The Process for Professional Progression .....	13
	A. Unit Peer Review Committee.....	14
	B. Agency Peer Review Committee .....	15
VII.	Appeals Procedure for Professional Progression .....	15
Appendix A		
	I. Preparations for Promotion.....	17
	II. Checklist and Process Schedule .....	18
Appendix B		
	I. Outline for Cumulative Program Specialist Achievement Report.....	19

**Texas A&M AgriLife Extension Service  
Professional Career Ladder System for  
Extension Program Specialists**

## **I. INTRODUCTION**

Texas A&M AgriLife Extension Service personnel extend relevant, science-based information to the people of Texas through a variety of educational programs as a part of the mission of the land-grant university system. Although the work of all Extension educators is essential to achieving the land-grant mission, the job description, responsibilities, and duties of Extension educators are not the same. This document provides a framework to recognize and delineate differences within Extension's program delivery system and provides a professional career ladder for Extension Program Specialists.

Extension Program Specialists are significant contributors to the delivery of educational programs, products and/or services that provide direct support to the overall Extension mission. They are expected to be creative and progressive in their work. They foster cooperative working relationships with other employees and maintain a detailed knowledge of educational programs, research efforts, and organizational needs to provide effective programs, products, and support services. Extension Program Specialists should continuously advance in their knowledge of and ability to apply principles, techniques, and technologies from their respective fields to the development and delivery of educational programs, products, and/or services for all people. Standards of achievement in this career ladder system are flexible enough to accommodate a wide array of job descriptions and duties, given the varied nature among Extension Program Specialist positions.

## **II. Overview of Promotion Requirements and Timeline**

### **Extension Program Specialist Levels & Promotion Requirements**

#### **Extension Program Specialist I**

- MS or BS plus 5-years' experience in a relevant field
- Perceived ability or evidence of success in performance domains

#### **Extension Program Specialist II**

- MS plus 5-years at Level I at proposed date of promotion; or MS and at least 3 years at level I plus at least 2 years of relevant professional experience (not including any years of relevant experience counted for a BS hire as Extension Program Specialist I) by the proposed date of promotion
- Demonstrated ability and evidence of competence in the performance domains

#### **Extension Program Specialist III**

- MS plus 5-years at Level II by the proposed date of promotion; or MS and at least 3 years at level II plus and at least 2 years relevant professional experience (not

including years of relevant experience counted for a BS hire or level II promotion) by the proposed date of promotion

- Demonstrated ability and evidence of excellence in the performance domains

#### Senior Extension Program Specialist

- Master's degree Plus 5-Years at Level III by the proposed date of promotion
- Demonstrated ability and evidence of excellence in the performance domains

### **Timeline of Promotion Process**

Jan./Feb.

- AgriLife provides training on the promotion process

May/June

- Unit Head identifies the candidates desiring promotion
- Candidate initiates preparation of the Comprehensive Program Specialist Achievement Report (CPSAR)

June/July

- Unit Head names Unit Peer Review Committee

August

- Candidates submit Request for Promotion and CPSAR to Unit Head
- Unit Head sends Request for Promotion and CPSAR to Unit Peer Review Committee

September

- Unit Peer Review Committee conducts Candidate reviews

Mid-October

- Unit Peer Review Committee submits Statements of Quality, vote tally and recommendations to Unit Head

Mid-November

- Unit Head writes Letter of Recommendation
- Unit Head submits Letter of Recommendation, Unit Review Committee documents and promotion packet (excluding work samples) to Extension Director (or designee) by stated deadline

December

- Extension Director (or designee) sends Letter of Recommendation, Unit Review Committee documents and promotion packet to Agency Peer Review Committee

Jan./March

- Agency Peer Review Committee conducts candidate review and sends its recommendations and the other promotion documents to Extension Director

- Extension Director makes final promotion decisions and approves promotions
- Extension Director informs Unit Head of promotion decisions
- Unit Head informs candidate for promotion of decision

Early April

- Candidates may file Appeals (see section VII. Page 14)

May

- Promotions are announced by Extension Director

September 1

- Approved promotions become effective

### **III. SPECIFIC TITLES FOR EXTENSION PROGRAM SPECIALISTS**

Progressive, non-tenured ranks will be assigned to each qualified Extension Program Specialist. The title will include Extension Program Specialist, the rank, and may be followed by a subject matter subtitle or department name. Four rank levels will be used: Level I, Level II, Level III and Senior Extension Program Specialist. Example uses of titles and rank are:

- Extension Program Specialist I - Risk Management
- Extension Program Specialist II - Entomology
- Extension Program Specialist III - 4-H Youth Development
- Senior Extension Program Specialist - EFNEP

### **IV. BASIS FOR EVALUATION**

Extension Program Specialists will be evaluated for advancement through the career ladder system described in these guidelines. Evaluation of an individual's effectiveness and level of accomplishment will be based on the activities and contributions documented in the individual's Cumulative Program Specialist Achievement Report (CPSAR; see Appendix B). The significance of accomplishments should be placed in the context of the strategic plans and goals of the individual's program, the unit, and the agency. Program Specialist contributions and accomplishments will be assessed by peer, supervisory, and clientele input. *Critical to this process is a carefully formed position description that conveys the specific responsibilities, duties, and expected program outcomes or deliverables for the individual in an Extension Program Specialist position.* Position descriptions should be reviewed annually and modified, with concurrence of the supervisor, to accurately reflect workload and responsibilities. The weighting of evaluation criteria is flexible to fit most appropriately with the position description.

The process of promotion begins when a prospective employee is evaluated for employment. At that time, expectations for professional advancement should be made clear by the hiring supervisor. Initial ranking as an Extension Program Specialist is based on the individual's previous professional experiences and education, as outlined in this document. The hiring supervisor will recommend through administrative channels an initial assigned rank for the

Extension Program Specialist. Final approval is made by the Director.

Once employed, individual performance should be evaluated annually, and performance metrics discussed by the supervisor. If the unit head is not the supervisor, the unit head should also review and approve the performance document. A properly conducted performance review will allow the Extension Program Specialist to understand how well he or she is progressing toward consideration for promotion to the next level. The unit head will provide appropriate feedback to Extension Program Specialists regarding their performance. Program Specialists must be kept informed of expectations and their evaluations should be conducted in a consistent manner. Individuals may meet with the unit head or unit peer committee for counsel upon request. A departmental or unit mentoring program is highly recommended to assist Extension Program Specialists in achieving advancement.

Activities documented in six standard performance domains, along with a domain for additional responsibilities form the basis for an accurate assessment of professional progress of Extension Program Specialists under consideration for promotion. These domains, listed below, align with the CPSAR outline and the instrument used by supervisors for annual performance evaluations (AG-478; see Appendix D).

**A. Program Development and Implementation**

This domain encompasses all work (initiated or assigned) set priorities and emphases; to plan, develop, and deliver content and implement Extension programming and initiatives. This domain includes program delivery including: development and distribution of educational materials (printed or electronic) and demonstration of new technology and programming. It also includes planning activities including: county Extension agents, county boards/committees, specialists, teaching/research faculty, industry, clientele leaders, and other organizations, groups and agencies. Planning included in this performance domain will support both clientele-focused education and training of volunteers for program delivery and evaluation.

A variety of peer and clientele inputs appropriate to the candidate's position may be used to document the quality, creativity, significance, and professionalism of his/her efforts and leadership in developing Extension programs, services, products, and/or processes. Some Extension Program Specialists have positions that place them regularly in direct program delivery contact with clientele while others do not. Appropriate evaluation should evaluate corroborating information and sources with reference to the candidate's position description.

**B. Outcomes of Programs**

The outcomes and impacts of program implementation and teaching should be included in this section. Outcome/impact activities include program evaluation and interpretation of outcomes, consistent with the position description. This includes identifying measurable indicators of program impacts, collection of baseline data, and documentation of outcomes and impacts of programming efforts. Evidence of successful programs and impacts may include: changes in knowledge, skills,

attitudes, practices, and behavior. Specific examples of metrics may be accident rate reduction, lives saved, practices adopted, money saved, human health improved, income increased, improved economic viability or positive environmental impacts. Data may be obtained from a variety of sources to document impacts. Reports from other agencies, groups, and organizations may be cited for program evaluation and interpretation.

**C. Faculty/Staff Training and Assistance**

Extension Program Specialist position descriptions may indicate the expectation that the employee help meet faculty and staff training needs. This performance domain covers work individually and with others to plan, provide content, and implement training for Faculty/Staff, consistent with the Program Specialist's position description.

Contributions to faculty/staff training and assistance may include development of training curricula and resources, presentation of training at professional development programs or via self-study methods that are made accessible to faculty and staff. Extension Program Specialists are expected to report Faculty/Staff training via non-traditional methods, such as eXtension Ask an Expert where possible under this performance domain.

**D. Support of Extension Activities**

This performance domain includes all activity to enhance program effectiveness by seeking and maintaining financial, material, and human support through grants, contracts, participant fees, sponsorships, and innovative linkages with other agencies, industry, or organizations. Examples include support for demonstrations and applied research and support for programs, publications and materials. It also includes support of other organizational needs, such as funds supporting 4-H programs and contests and recognition of cooperators and volunteer leaders. Grant and fee-based programming efforts are included.

Also, within this domain Program Specialists will be evaluated on organizational maintenance and support, including: 1) routine accountability and reporting; 2) development of individual plans of work on an annual basis; 3) responsiveness to administrative requests; 4) special projects; and 5) internal and external committees, such as those concerned with operational efficiency, awards, public relations, etc.

**E. Coordination and Cooperation**

This performance domain encompasses timely and effective teamwork, communication, coordination, scheduling, and all other actions to establish and enhance mutual support among internal and external individuals, groups, and organizations that have related responsibilities, resources, or audiences. This includes coordination and cooperation with:

1) other department/unit members and the supervisors; 2) specialists and research faculty in other disciplines; 3) district Extension administrators, regional program leaders, county faculty; and 4) other agencies and organizations.

Assessment in this area should involve judgments of unit teamwork and cooperative efforts with colleagues across the organization, as well as the building and fostering of productive cooperative relationships with external groups and colleagues across the state and nation. Some Extension Program Specialists have specifically defined areas and responsibilities by geography, funding source or position description, which affect the scope of cooperation and coordination. Evaluation of efforts in coordination and cooperation should reflect expectations outlined in the position description.

**F. Professionalism and Service**

It is critical for Extension Program Specialists to remain current with skills, technology, delivery methods, and subject matter expertise appropriate for their position description. Evidence of the continuous acquisition of knowledge, skills, and application through formal training or other means is expected and should be assessed. Leadership and activity in professional organizations, including publications and presentations at professional meetings, are encouraged and will be considered in the review process. Work-associated awards and honors received will be considered.

**G. Additional Responsibilities**

These include responsibilities specifically identified in the Extension Program Specialist's position description that do not fall within one of the six sections above but are appropriate and should be included in the CSPAR.

**V. STANDARDS OF ACHIEVEMENT**

There are three ranks in the Extension Program Specialist career ladder system—Level I, Level II, Level III and Senior Extension Program Specialist (highest ranking). Level I is not a mandated entry level rank. The rank most appropriate to a new hire's credentials should be assigned by the hiring supervisor and could be a Level I, II, III or Senior Extension Program Specialist.

**A. Extension Program Specialist I**

1. Degree and Experience Requirements

Master's degree in a relevant field is preferred, however candidates with a bachelor's degree in a relevant field and five years of relevant professional experience meet basic qualifications. While a MS degree is not required for an Extension Program Specialist I, an MS degree is required for promotion to Extension Program Specialist II.

2. Performance Domains:

(a) Program Development and Implementation

Perceived ability and evidence of competence necessary to:

- Effectively plan and deliver effective educational programs.
- Determine and understand the type of educational products and



reports needed to meet the needs of clientele (end-users, etc.) and the organization.

- Manage projects and priorities to complete job responsibilities and duties related to clientele education in a timely manner.
- Implement effective approaches to the problem-solving processes involved in producing educational programs and services for clientele.
- Effectively utilize and adapt available technologies for program development and delivery to clientele.
- Develop effective learning environments for adult and youth clientele audiences.
- Determine and understand the needs and interests of targeted audiences for effective program delivery.
- Select suitable teaching methods and techniques for achieving clientele learning objectives.
- Identify, train, and support volunteers to enhance effective adult and/or youth education programs as appropriate for position.

(b) Outcomes of Programs

Satisfactory indication of personal/professional traits necessary to:

- Assess and report outcomes and impacts of programs.
- Utilize feedback and evaluations to improve teaching effectiveness.

(c) Faculty/Staff Training and Assistance

Satisfactory indication of collaboration and initiative to:

- Contribute to faculty/staff training and assistance, as needed.
- Serve as a resource to other faculty and staff, including district and county personnel.
- Support development and distribution of training and informational materials for faculty and staff. This includes contributions to internal employee websites, blogs, and newsletters, etc.

(d) Support of Extension Activities

Satisfactory indication of personal/professional traits necessary to:

- Understand and carry out the agency mission, organizational operations, and goals.
- Support planning and production of materials to enhance outreach education and informational programs.
- Develop and implement fee-supported programs with clientele as appropriate.
- Function effectively on program planning committees and in various service capacities at the unit and agency level.
- Support grant-seeking activities, both submitted and awarded.
- Effectively participate on internal Extension organizational committees.
- Work with individuals, organizations, agencies, and/or corporate entities to provide financial and in-kind support for Extension programming.

(e) Coordination and Cooperation

Professional and personal attributes necessary to:

- Work as an effective team member to plan, produce, and implement educational programs, products, and services.
  - Contribute effectively to team efforts which extend beyond the department or unit (i.e., program development teams, issue response teams, etc.).
  - Work cooperatively with industry and other external groups (i.e., associations, agencies, related companies) to advance organizational goals.
  - Coordinate Extension activities with appropriate units and individuals to increase efficiency and effectiveness.
- (f) Professionalism and Service  
Evidence indicating a commitment to:
- Increase competency in area of expertise.
  - Contribute to professional and industry organizations through membership, attendance, and service.
  - Provide service to the agency, the department and the discipline by serving on committees, manuscript review, student/youth mentoring, by teaching and through other service.

## **B. Extension Program Specialist II**

The standards of achievement presented here are in addition to standards for the Extension Program Specialist, Level I.

1. Degree and Experience Requirements – An MS degree is not required at Extension Program Specialist I level, but it is required for promotion to Extension Program Specialist II.
  - (a) For promotion: Master's degree and a minimum of five years since Level I appointment; or MS and at least 3 years at Level I plus at least 2 years of relevant professional experience (not including relevant professional experience counted for hire at the BS level) by the proposed date of promotion.
  - (b) For appointment of new hires to Level II: Master's degree plus at least five years of relevant professional experience.
2. Performance Domains (in addition to those of the lower rank)
  - (a) Program Development and Implementation Demonstrated ability and evidence of competence in:
    - Engagement with clientele and targeted audiences (i.e. steering committees) to prioritize issues and develop effective and relevant educational products and/or services meeting the expectations of stakeholders.
    - Novel and innovative application of technology, problem-solving, and development of educational programming with internal/external partners.
    - Implementation of educational programs and/or services that have produced significant positive impacts for stakeholders.
    - Production of publications, newsletters, popular press articles and/or

- electronic outreach to educate clientele in area of expertise.
  - Effective use of volunteers to improve and increase educational programming, as appropriate for position.
  - Recognition from peers, stakeholders and/or supervisors for effective programming. This may include planning, leading, delivering, and/or coordinating development of in-depth programs or complex educational events.
- (b) Outcomes of Programs  
Demonstrated ability and evidence of competence necessary to:
  - Utilize evaluations to assess program impacts.
  - Write outcome reports which effectively document program impacts.
- (c) Faculty/Staff Training and Assistance  
Demonstrated ability and evidence of competence necessary to:
  - Identify faculty/staff training needs and deliver or facilitate the delivery of faculty/staff training.
  - Employ train-the-trainer methods to enable targeted faculty/staff to train other personnel consistent with Position Description.
  - Utilize evaluations to determine future objectives and outcomes of training outcomes and future objectives.
  - Initiate professional development updates to County Extension Agents as needed through appropriate channels.
  - Mentor coworkers as needed and appropriate.
- (d) Support of Extension Activities  
Personal and professional traits and ability to:
  - Share knowledge with coworkers through effective communication programs, if appropriate to the position.
  - Develop and implement fee-supported programs with clientele.
  - Contribute to grant proposals and execution of grants, as appropriate for the position.
  - Demonstrate effective working relationships with sponsors and donors, and secure and maintain support and resources for educational programs.
- (e) Coordination and Cooperation  
Professional and personal attributes necessary to:
  - Make significant contributions through leadership roles on unit and agency teams.
  - Develop personal and organizational relationships with industry and other external groups to advance organizational goals.
  - Coordinate and cooperate effectively with co-workers and partners to deliver effective educational programs.
  - Cooperate and Coordinate with coworkers and supervisors to accomplish Agency and Departmental goals.
- (f) Professionalism and Service  
Evidence indicating a commitment to or acquisition of:
  - Service to the agency, unit/department and discipline as student/youth mentor, by teaching, and as editor and/or reviewer of

publications.

- Demonstrated commitment to the department, Extension and the discipline through service on committees, and participation in activities that support these organizations.
- Participate in professional development opportunities to improve knowledge in area of expertise.
- Establish a record of activity and recognition in professional and/or Industry-related organizations that benefit AgriLife Extension's goals.

### **C. Extension Program Specialist III**

The standards of achievement presented here are additive to those standards for the Extension Program Specialist, Level II.

1. Degree and Experience Requirements
  - (a) For promotion: Master's degree and a minimum of five years since Level II promotion or appointment; or MS degree and a minimum of 3 years at Level II plus at least 2 years relevant professional experience (above any years counted for a BS hire or a Level II promotion) by date of proposed date of promotion.
  - (b) For appointment of new hires to Level III: Master's degree in a relevant field and 10 years of relevant professional experience.
2. Performance Domains (in addition to those of the lower ranks)
  - (a) Program Development and Implementation  
Evidence of proficiency and excellence in the following categories:
    - Planning and implementing innovative and effective educational programs.
    - Recognition for novel and innovative application of technology, problem-solving, and development of educational programming with internal/external partners.
    - Implementation educational programs and/or services that have produced significant positive impacts for stakeholders.
    - Production of publications, newsletters, popular press articles and/or electronic outreach to educate clientele in area of expertise.
    - Effective use of volunteers to improve and increase educational programming, as appropriate for position.
    - Recognition of peers, stakeholders and/or supervisors for effective programming. This may include planning, leading, delivering, and/or coordinating development of in-depth programs or complex educational events.
  - (b) Outcomes of Programs  
Personal and professional traits necessary to:
    - Demonstrated use of innovative evaluation methods to improve

- quality of program delivery, educational products and outcome reports.
- Demonstrated competence in writing effective outcome reports.
- Demonstrated program outcomes which have improved the lives of clientele through learning, adoption of practices and/or change of condition (economic, environmental, human health and/or quality of life).
- (c) Faculty/Staff Training and Assistance  
Evidence of ability and competence necessary to:
  - Proactively determine training needs, and plan and implement faculty/staff trainings, in coordination with appropriate supervisors and Specialists – consistent with Job Description.
  - Demonstrate a record of effective training of faculty and staff.
  - Mentor coworkers as assigned, needed and appropriate.
- (d) Support of Extension Activities  
Personal and professional traits necessary to:
  - Demonstrate leadership within the agency, unit/department and discipline which advance organizational goals.
  - Build and maintain relationships with industry and other granting agencies to aid in developing grants to support educational programming
  - Identify, secure, and maintain financial support and other resources for educational programs as appropriate for the position.
- (e) Coordination and Cooperation  
Professional and personal attributes necessary to:
  - Provide leadership and create partnerships and collaborate with internal and external groups to meet clientele educational needs and accomplish program objectives.
  - Effectively coordinate educational activities with partners at different levels of the organization and with other partners.
  - Cooperate and coordinate effectively with coworkers and supervisors to achieve agency goals. Report activities and impacts effectively.
- (f) Professionalism and Service  
Evidence Indicating a commitment to:
  - Leadership and participation in activities of the agency, the department and professional societies.
  - Service through mentoring students and youth.
  - Service as journal editor and as manuscript reviewer, teaching, and other scholarly activity as appropriate and consistent with the position description.

#### **D. Senior Extension Program Specialist**

The standards of achievement presented here are additive to those standards for the Extension Program Specialist, Level III.

1. Degree and Experience Requirements
  - (a) For Promotion: Master's degree Plus 5-Years at Level III by the proposed date of promotion
2. Performance Domains (in addition to those of the lower ranks)
  - (a) Program Development and Implementation

Evidence of expertise and excellence in the following categories:

    - Organizing, planning, implementing and management of highly recognized innovative and effective educational programs that have achieved statewide and/or national/international recognition in the field.
    - Highly recognized novel and innovative application of technology, problem-solving, and development of educational programming with internal/external partners.
    - Implementation of educational programs and/or services that have produced significant positive impacts for stakeholders
    - Production of publications, newsletters, popular press articles and/or electronic outreach to educate clientele in area of expertise.
    - Effective use of volunteers to improve and increase educational programming, as appropriate for position.
    - Recognition by peers, stakeholders and/or supervisors for effective programming. This may include planning, leading, delivering, and/or coordinating development of in-depth programs or complex educational events.
  - (b) Outcomes of Programs

Personal and professional traits necessary to:

    - Develop and use innovative evaluation methods to improve the quality of program delivery, educational products and outcome reports.
    - Show a high level of effectiveness in writing outcome reports.
    - Achieve substantiated program outcomes that improve the lives of clientele through learning, adoption of practices, improved behavioral outcomes and/or change of condition (economic, environmental, human health and/or quality of life).
  - (c) Faculty/Staff Training and Assistance

Evidence of ability and competence necessary to:

    - Proactively determine training needs, and plan and implement faculty/staff trainings, in coordination with appropriate supervisors and Specialists – consistent with Job Description.
    - Demonstrate a record of effective training of faculty and staff.
    - Mentor coworkers as assigned, needed and appropriate.
    - Supervision of other staff, employees or program volunteers as appropriate to the job.
  - (d) Support of Extension Activities

Personal and professional traits necessary to:

    - Demonstrate leadership within the agency, unit/department and

- discipline that advances organizational goals.
- Build and maintain relationships with industry and other granting agencies to aid in developing grants to support educational programming.
- Identify, secure, and maintain financial support and other resources for educational programs as appropriate for the position.
- Where applicable, support applied research with industry base, joint agency projects, and in-depth surveys.
- (e) Coordination and Cooperation  
Professional and personal attributes necessary to:
  - Provide leadership, create partnerships, and collaborate with internal and external groups to meet clientele educational needs and accomplish program objectives.
  - Effectively coordinate, manage, and lead educational activities with partners at different levels of the organization and with industry and other partners.
  - Cooperate and coordinate effectively with coworkers, supervisors, and administration to achieve agency goals. Report activities and impacts effectively.
- (f) Professionalism and Service  
Evidence indicating a commitment to:
  - Leadership position in statewide, regional or national extension or subject matter organizations, or providing leadership in securing grant/contract funds to address clientele-programming needs or serve as lead/co-author of peer reviewed journal articles.
  - Service through mentoring students, youth and extension professionals.
  - Service as journal editor, manuscript reviewer, or other scholarly activity as appropriate and consistent with position description.

## **VI. THE PROCESS FOR PROFESSIONAL PROGRESSION**

Following appointment to an initial rank, an Extension Program Specialist will become eligible to seek promotion after meeting the degree and experience requirements for the next rank and having documented achievements toward the criteria for promotion. Upon becoming eligible to seek promotion, the candidate may apply annually to be considered for promotion to the next rank.

### **A. Unit Peer Review Committee**

A Unit Peer Review Committee will be selected by the unit head to review requests for promotion by Program Specialists within the unit. This committee should be composed of employees who are at a rank above that of the candidate being considered for promotion. The Unit Peer Review Committee should be primarily from within the unit but may include members from other units. The committee should be comprised of individuals who can evaluate the performance of the

candidate. The unit head (or designee) must receive and review the written input from the Unit Peer Review Committee before writing and forwarding the unit head recommendation on a candidate. The peer review committee must meet the following guidelines:

1. A Unit Peer Review Committee should have a minimum of five actively employed Extension faculty, as follows: Extension Program Specialists at the upper two levels of rank are eligible to serve, but only those with a rank higher than the candidate being considered may participate in that candidate's review for promotion. Extension specialists (professor or associate professor) may also serve on the committee.
2. Committee recommendations should be based on the record of performance documented in the candidate's promotion package, evaluated using the criteria and procedural guidelines established in this career ladder document.
3. Committee deliberations must be conducted in confidence and should focus on the content of the promotion package only.
4. Committee recommendations are advisory in nature. The Unit Peer Review Committee's recommendation letter to the unit head must report the vote of the committee (including abstentions), an evaluative statement of the quality of the CPSAR document and the recommendation of the committee - including the basis for the recommendation.
5. The unit head (or designee) is responsible for conferring with the candidate about the unit committee's recommendations and for continuing with the process prescribed herein.
6. If **neither** the Unit Peer Review Committee **nor** the unit head (or designee) recommend moving the promotion package forward, no further action will be taken. In the next annual cycle, the promotion process may start again, given appropriate professional achievement.
7. If the Unit Peer Review Committee and the unit head **disagree** on a recommendation, then the unit head will forward the candidate's record through the agency director (or designee) for examination by the Agency Peer Review Committee.
8. If the Unit Peer Review Committee and the unit head **concur** in recommending promotion, the unit head will forward the candidate's record through the agency director (or designee) for examination by the Agency Peer Review Committee.



**B. Agency Peer Review Committee**

The agency director (or designee) will appoint a seven-member agency-level committee—the Agency Peer Review Committee for Extension Program Specialists—to consider all unit-level recommendations. The agency committee will include at least three Extension Program Specialists at a rank above those being considered for promotion. The remaining committee membership should be comprised of active Extension Specialists (professor or associate professor) from units having at least one Extension Program Specialist.

When serving on this committee, all members may participate in deliberations; however, members must abstain from voting on any promotion package that they assessed as a voting unit reviewer during the same promotion cycle. The committee will be responsible for reviewing all recommendations for promotion of Extension Program Specialists submitted to them that year. The committee's recommendations will be submitted to the agency director (or designee) for review and final decisions.

**VII. APPEALS PROCEDURE FOR PROFESSIONAL PROGRESSION**

Candidates for promotion are responsible for adhering to the promotion guidelines. If an Extension Program Specialist's request for promotion is not approved, the candidate has the right to present grievances regarding the process or decision by filing a written appeal to the agency director.

A basis for such an appeal exists when, in the opinion of the Extension Program Specialist, the reviewing unit failed to adhere to procedures detailed in this document.

- A.** The written appeal must include the reason(s) for the appeal and any supporting evidence/documentation to be considered. Written appeals must be received by the agency director within 20 working days of the notification of denial. Individuals having concerns or grievances relating to other aspects of the Professional Career Ladder for Extension Program Specialists are encouraged to seek resolution of those concerns through established supervisory channels before filing a written appeal.

On receipt of an appeal request from a candidate for promotion, a five-member, ad hoc Appeals Committee will be appointed by the agency director to review the appeal(s). Committee membership should be composed of Extension Program Specialists chosen from units other than that of the appellant and holding rank equal or higher than the rank sought by the appellant.

- B.** The appellant may request to meet with the Appeals Committee to present the case. Such a request must be included in the written appeal. If the appellant elects to be represented by an attorney, the appellant will notify the agency director that an attorney will be present at least five working days before the date the appeal is to be heard. The appellant will be solely responsible for any legal

expenses incurred in such representation.

- C.** The Appeals Committee will judge the merits of the case and forward its written recommendation with supporting documentation to the agency director for final action.
- D.** The agency director will notify the appellant in writing of the final decision. Final notification will be made within 60 working days of receipt of the written request for appeal by the director.

## **Appendix A**

### **I. PREPARATIONS FOR PROMOTION**

- A. It is recommended that each unit establish a promotion oversight or mentor committee to aid candidates in the development of resources required in the promotion process. Each unit must establish a five-member unit peer review committee for Extension Program Specialists (see Section VI.A. page 12).
- B. All individuals in the Professional Career Ladder System for Extension Program Specialists shall receive an annual performance evaluation by their immediate supervisor. If the unit head is not the individual's immediate supervisor, then the unit head will also review the evaluation.
- C. Individuals who seek promotion should prepare and submit required materials to the unit head. The unit head should work with the candidate such that preparations and actions are taken in a timely manner, consistent with the Timeline of the Promotion Process (see Section II. Page 2). The process should allow sufficient time for the unit-level and agency-level reviews to be conducted within the specified timeline. The materials required from the promotion candidate are:
  - 1. A promotion request statement (limited to two pages). If appropriate, copies of previous position descriptions may be added to clarify job function throughout an individual's career.
  - 2. A Cumulative Program Specialist Achievement Report (CPSAR), as outlined in Appendix B. The CPSAR should be comprehensive of the candidate's time served as an Extension Program Specialist and include a current position description. The report must be signed by the candidate indicating it is the most current and correct as of the date of the signature.
  - 3. Four letters will be solicited by the Associate Department Head (ADH) or Program Leader (PL). They can be from clientele, agents, specialists, researchers, or staff. All support letters will be included in the packet by the ADH or PL before the packet is submitted. Letters of Reference should not be seen by the candidate for promotion.
  - 4. Representative samples of work (for inclusion/review at the unit level only).
- D. Before forwarding materials to the agency-level peer review committee, the unit peer review committee will add:
  - 1. An evaluative statement of CPSAR quality including its assessment of the following: program development and implementation, outcome of programs, faculty/staff training and assistance, support of Extension activities, coordination and cooperation, and professional development and service.

2. A recommendation for or against promotion, including the committee's vote and its written basis for recommendation.
- E. The unit head (or designee) will add a letter of recommendation for or against promotion, including the unit committee's membership and vote tally, and the unit head's basis for recommendation.
  - F. The unit head (or designee) must inform the candidate in a timely manner of the recommendation for or against promotion at each level of the review process. In the event of a negative promotion decision, the candidate shall be informed in writing concerning the decision.
  - G. Candidates have a right to appeal negative promotion decisions. See Section VI in the guidelines.

## **II. CHECKLIST AND PROCESS SCHEDULE**

- A. Checklist of materials to be submitted by candidate:
  - [ ] Candidate's Request for Promotion, up to two pages.
  - [ ] Comprehensive Cumulative Program Specialist Achievement Report (CPSAR), including current position description.
  - [ ] Four solicited letters of reference. These letters are not to be shared with the candidate for promotion.
  - [ ] Representative examples of the candidate's work, for review at the unit level only. Examples should not be forwarded to the agency review committee but should be retained by the unit pending completion of the entire promotion process.
- B. Checklist of materials added by unit peer review committee and unit head, following the items above:
  - [ ] From unit peer review committee – A letter for or against promotion, including the committee's vote and basis for recommendation, along with a statement of CPSAR quality (See Appendix A).
  - [ ] From unit head – A letter for or against promotion, including the unit committee membership and vote tally, and the unit head's basis for recommendation.
- C. Promotion Process Schedule  
The promotion process begins with the unit head's announcement each year requesting interest on the part of Extension Program Specialists and ends with the effective date of promotion–September 1 of the following year. A general time-line is provided in Section II. Overview of Promotion Requirements and Timeline. Page 1.)

## Appendix B

### Outline for Cumulative Program Specialist Achievement Report (CPSAR)

#### I. Personal Information

- A. Name
- B. Title
- C. Current department or program unit
- D. Date initially hired/appointed to Extension
- E. Date of last promotion in rank or appointment to the current position

#### II. Position Description

##### A. Percent Appointment

AgriLife Extension:

AgriLife Research:

Teaching (name university): \_\_\_\_\_  
100%

##### B. Major Areas of Performance

Describe duties related to the headings below, which align with the program specialist performance domains. Simply note if there are no responsibilities to report under a heading. Use sufficient detail to enable reviewers to understand the role and scope of the position. Consider statements that provide context, such as, “my technical specialization is...,” “work includes adult/youth audiences with emphasis on...,” and “program development/ delivery/support is primarily focused on.” Subsections may be added to emphasize special or unique areas of responsibility.

1. Program Development and Implementation
2. Outcome of Programs
3. Faculty/Staff Training and Assistance
4. Support of Extension Activities
5. Coordination and Cooperation
6. Professionalism and Service
7. Additional Responsibilities

*NOTE: A limit of two pages is preferred for the information above.*

#### III. Education, Training and Specialization

##### A. Academic Background:

<u>Degrees</u>	<u>Graduation Date</u>	<u>Major</u>	<u>University</u>
B.S./B.A.			
M.S/M.A.			
Ph.D.			
ED.			

- B. Current Professional Certifications (list with date obtained)
- C. Professional Experience: Starting with the most recent, briefly list and describe your prior roles, jobs, and background.

IV. Cumulative Achievements

Report your achievements in each performance domain. Refer to Section III, “Basis for Evaluation,” and Section IV, “Standards of Achievement” for the rank you are seeking. For content, consider the performance indicators and sources of information for qualitative assessment, Appendix C. Incorporate subheadings and subsections as desired. Simply note “not applicable” if a performance area is not part of your job duties.

- A. Program Development and Implementation
- B. Outcome of Program
- C. Faculty/Staff Training and Assistance
- D. Support of Extension Activities
- E. Coordination and Cooperation
- F. Professionalism and Service
- G. Additional Responsibilities

V. Narrative Summary of Major Accomplishments

Present a brief statement/overview of major accomplishments reported in the CPSAR (one page or less)