ANNUAL EVALUATION

To be used by all Academics in all titles not seeking an advancement.

**For the Period October 1, 2023– September 30, 2024**

Due by deadline set by your supervisor. Recommended to be completed in autumn 2023.

Upload by December 9, 2024

*The annual evaluation process provides an academic and their supervisor an opportunity to discuss the academic’s annual activities, progress towards realizing goals and objectives, and future directions. For guidance in completing the Annual Evaluation, see “Guidelines for Preparing Annual Evaluations” at* [*http://ucanr.edu/aeguidelines*](http://ucanr.edu/aeguidelines)*. Delete italicized text, save your Annual Evaluation as one PDF document, and upload to Project Board.*

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| --- | --- |
| **Name:** |  |
| **Academic Title:** | *Select your title from the following list and delete the others:* Assistant/Associate/Full Professional ResearcherAssistant/Associate/Full Project ScientistJunior/Assistant/Associate/Full SpecialistAssistant/Associate/Full Specialist in Cooperative ExtensionAssistant/Associate/Full Cooperative Extension AdvisorAcademic Administrator I/II/III/IV/V/VI/VIIAcademic Coordinator I/II/III |
| **County/Program:** |  |
| **Current Rank/Step:**  |  |

1. **Position Description**
2. *Upload your most current position description to Project Board.*
3. *If you are a new hire and your position description is under development, upload your PVA (position vacancy announcement) in Project Board.*
4. *Please name your PDF file: [YearOfAction]\_[LastName]\_PositionDescription.pdf (e.g., 2024\_Doe\_PositionDescription.pdf).*
5. **Progress Towards Last Year’s Goals and Objectives: October 1, 2023– September 30, 2024**

*Copy your goals and objectives table from your previous annual evaluation or program review dossier. Add a fourth column (green) to describe progress towards your goals and objectives, including new collaborators; or outcomes and impacts.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Specific Goals and Objectives** | **Anticipated Collaborators** | **Anticipated Outcomes and Impacts** | **Progress** (including any new collaborators or outcomes/impacts) |
| **Theme 1 (Goal): [name here]** |
| Objective:  |  |  |  |
| Objective: |  |  |  |
| Objective: |  |  |  |
| **Theme 2: [name here]** |
| Objective:  |  |  |  |
| Objective: |  |  |  |
| Objective: |  |  |  |
| **Theme 3: [name here]** |
| Objective:  |  |  |  |
| Objective: |  |  |  |
| Objective: |  |  |  |
| **General/Other** |
| Objective:  |  |  |  |
| Objective: |  |  |  |

**III. Barriers or Obstacles in Accomplishing your Goals and Objectives *(narrative)***

*Describe barriers/obstacles experienced in the past year and summarize progress made to overcome them.*

**IV. Project Board Reporting due by December 9, 2024 *(check boxes)***

These are required for annual organizational reporting in Project Board by the noted due date. Please indicate you have submitted required annual organizational reporting (check):

[ ] program outcomes and impacts (reported in Project Board – Themes)

[ ] Extension activities (reported in Project Board – Activities)

[ ] review and update clientele group(s) baseline (updated in Project Board – Clientele)

[ ] clientele contacts (reported in Project Board – Activities)

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

**V. Goals and Objectives for the Coming Year: October 1, 2024 - September 30, 2025**

*Include objectives you intend to accomplish in the coming year, anticipated collaborators, and anticipated outcomes and impacts. It is recommended that you organize your objectives according to the themes you are going to use in your program review dossier. Remember to include goals and objectives addressing the advancement criteria for your title series. Academic Human Resources recommends that academics and supervisors have a conversation about goals and objectives in the fall; there is not firm deadline set by ANR.*

**Part 1. Goals and Objectives for the Coming Year**

|  |  |  |
| --- | --- | --- |
| **Specific Goals and Objectives** | **Anticipated Collaborators** | **Anticipated Outcomes and Impacts** |
| **Theme 1 (Goal): [name here]** |
| Objective: |  |  |
| Objective: |  |  |
| **Theme 2 (Goal): [name here]** |
| Objective: |  |  |
| Objective: |  |  |
| **General/Other** |
| Objective: |  |  |

**Part 2. Anticipated Barriers or Obstacles in Accomplishing Your Goals and Objectives**

*Provide a brief narrative.*

**Part 3. Support from Supervisor(s)**

*Briefly describe any support you would find helpful from your supervisor(s).*

**VI. Sabbatical Leave Plan and Report *(if applicable)***

*Plans and reports for sabbatical leaves completed during the review period.*

**VII. Work Plan or Performance Improvement Plan *(if applicable)***

**Signatures**

|  |  |
| --- | --- |
| Academic | Date |
| Supervisor | Date |