April 29, 2016

ACADEMIC SENATE CHAIR
DEANS
DEPARTMENT AND PROGRAM CHAIRS
UCO DIRECTOR

Dear Colleagues:

RE: Formal Review of Revised Campus Policies Regarding the Specialist Series (CAPM 602.330)

I write to initiate formal review of proposed revisions to the above mentioned policy. Effective July 1, 2015, the Office of the President issued revised Academic Personnel Manual (APM) policy on the Specialist Series (APM-330). That issuance followed two major reviews including Management Consultation and Systemwide Review. The primary changes to APM-330 were clarifications of the definition, criteria, and qualifications for appointment and advancement in this series.

The definition of the Specialist series now reads:
“The Specialist series is used for academic appointees who are engaged in any specialized research, professional activity, and University and/or public service and who do not have any formal teaching responsibilities. Specialists are expected to use their professional expertise to make scientific and scholarly contributions to the research enterprise of the University and to achieve recognition in the professional and scientific community. Specialists may participate in University and/or public service depending upon funding source and duties required by the job description for the position.”

In addition to the above definition, the criteria for appointment and advancement were expanded to more clearly define the expectation for performance in research and the types of evidence required to demonstrate that performance. The qualifications were amended to refine the educational and experiential requirements for the different ranks within the series.

The proposed revisions to the Campus Academic Personnel Manual (CAPM) policy will bring CAPM 602.330 into conformance with APM-330. In addition, the proposed CAPM revisions will further define the campus implementation of the qualifications for appointment and advancement into the different Specialist ranks and revise the Delegation of Authority for all Specialist actions.

Since the new APM policy revises the criteria for appointment and advancement in this series, the campus implementation of the revised CAPM will include grandfathering in current appointees in the Specialist series. The evaluation of these individuals for advancement will be based on the revised criteria; however, we will not require the proposed new educational and experiential qualifications for advancement in rank. Advancement for these employees will be based on normal progression based on years of service at rank and step.
The proposed revised policies are available on the Academic Personnel Office website at http://apo.ucsc.edu/policy/policy-under-review.html. Comments are due Friday, June 10, 2016 and should be directed to Nancy Furber, Academic Personnel Office, furber@ucsc.edu. Please share this with affected members of your department or unit.

Sincerely,

Alison Galloway
Campus Provost and
Executive Vice Chancellor

cc:  Associate Vice Chancellor Peterson
     Department and Program Managers
     Divisional Academic Personnel Coordinators