

# Classification and Qualification



# STANDARDS

The California State University System

## Evaluator Series

Class Title	Class Code	Date Established	Date Revised	Occupation Index Reference
Evaluator Trainee	2634	10-1-86	New	O-1
Evaluator I	2632	7-21-56	10-1-86	O-1
Consortium Evaluator I*	9350	11/1/81	10-1-86	
Evaluator II	2633	10-1-86	New	O-1

*\*Note: In these standards all references to the Evaluator I class shall be interpreted to apply to the Consortium Evaluator I class as well.*

### INTRODUCTION TO THE SERIES:

The Evaluator Series includes all positions involved in the review, analysis, evaluation and processing of information, records and transcripts for determining academic credit and eligibility for degrees and specialized program designations. Depending upon the organizational structure of the campus, incumbents may also provide various levels of information, advice and assistance to students, faculty and administrative personnel regarding specific requirements for various degrees, majors, minors, and specialized program designations.

The nature of the work is focused primarily on responsibility for precise reviews and evaluations of academic records in contrast to the focus in classes in other Student Services areas in which the nature of the work involves assessing, interpreting and influencing student behavior, adjustment to campus life and goal choices.

The primary knowledges and abilities in this series relate to maintaining high degrees of accuracy, thoroughness, integrity and confidentiality. Errors in determining eligibility for degrees or in providing incorrect information or advice may cause serious consequences for the student.

### DEFINITION OF LEVELS:

The Evaluator Trainee classification provides opportunity for participation in a formalized, structured program of six months to one year duration to acquire the essential knowledges and abilities for performing academic records evaluation work. Depending on the prior experience of the Trainee, the length of the program is established to meet individual needs of the Trainee in acquiring the essential knowledges and abilities for evaluation work related to degree granting. Upon completion of the training, the Trainee is expected to be able to perform in virtually any campus evaluation unit in the Evaluator I classification with a minimum of supervision. Permanent status cannot be obtained in the Evaluator Trainee classification. Upon successful completion of the training program, Trainees are moved to the Evaluator I classification.

The Evaluator I makes determinations regarding eligibility for the granting of degrees based on knowledge and experience of records, transcripts and official documents in making evaluations against the appropriate criterion.

The assigned workload normally includes a full range of routine, difficult and problematic cases. Work is performed under general supervision and requires a high degree of accuracy. Final reviews for the granting of bachelor 's degrees are typically performed at this level. Considerable student contact may be involved in some assignments to provide interpretations and explanations of requirements and how these apply in specific situations. Incumbents

at the Evaluator I level typically provide information and advice to individual students concerning course equivalents, alternatives and options open to a student in qualifying for different majors, degrees or academic goals. Incumbents at the Evaluator I level may assist in training Evaluator Trainees.

The Evaluator II classification is designed for positions with lead responsibility requiring a significantly greater depth of knowledge and ability than that found at the Evaluator I level. In all cases, the Evaluator II has responsibility for resolving the most unique cases, for implementing and planning for changes in policy or process, and for resolving problems in ways that maintain accuracy, continuity and consistency of evaluation decisions for the group being led.

### **DISTINGUISHING CHARACTERISTICS:**

Incumbents in the Evaluator Trainee class are distinguished from incumbents in other classes by being in a learning capacity and by performing increasingly more difficult tasks with greater degrees of independence throughout the training period in order to acquire the knowledges and abilities required for the Evaluator I class.

Incumbents in the Evaluator I class, in contrast to incumbents in Clerical Assistant II or III classes, perform similar duties of a significantly wider scope and with greater independence. The Evaluator I class is designed primarily for positions in which incumbents have responsibility with great independence for determining eligibility for the granting of degrees and in the determination of official course credits that meet a criterion. This independence is a significant difference between the Evaluator I and clerical classes that perform similar duties, tasks and processes but without the authority to make official determinations regarding degrees and course credits toward degrees.

Although the Evaluator I classification standards describe work performed only in relation to determination of eligibility for degrees, some positions in the class may, in addition, be assigned to perform duties in the determination of eligibility for admissions. The evaluation work related to degree eligibility is the more difficult and responsible. Incumbents in positions assigned exclusively to perform tasks, procedures or functions related to the admission processes should not be assigned in this class.

Incumbents in the Evaluator II classification level have responsibility to lead the work of a unit of no fewer than two full-time employees. While much of the work performed at the Evaluator II level is the same as that being performed by others in the group being led, the Evaluator II has added responsibility for instructing, guiding, checking and correcting the work of others to maintain levels of productivity and quality.

### **Examples of Typical Activities:**

Review academic records against criteria for degrees; determine relevance and value of credit and standing for status, majors, minors, degrees and specializations; check accreditation of other higher education institutions from which credits were earned and determine level, content, unit value, and grading system; provide students with interim reports regarding requirements needed for degrees; write correspondence to seek records or interpretations of records from other institutions; interpret campus and CSU degree requirements to individuals or groups; advise students individually in relation to interpretation and articulation of requirements, regulations, and other criteria elements; organize and oversee the work of others who perform assigned tasks to assist in evaluation work; articulate course and core requirements with schedules of classes; keep records and make reports; collect, select, organize and analyze data; assist in maintaining the security of academic records.

## **MINIMUM QUALIFICATIONS:**

Knowledges and Abilities:

### **Evaluator Trainee:**

Knowledge of general office procedures, methods, and practices; knowledge of techniques used in processing information.

Ability to check complex records and detailed information for compliance with criteria; ability to be thorough and accurate in comparing records; ability to interpret and apply written regulations; and ability to maintain confidentiality of records and evaluations.

During training, the following knowledges and abilities must be acquired: ability to review and check transcripts, records and documents for compliance with criteria using specific guides; ability to interpret information from a variety of institutions, including foreign institutions with differing records systems; ability to interpret criteria for determining eligibility and substitutions or alternatives in granting credit for degrees.

### **Evaluator I**

Knowledge of the format and interpretation of course records and transcripts of institutions of higher education; knowledge of authenticating course credits and comparing records of differing formats, such as foreign records; knowledge of campus curriculum requirements for majors, minors, terminal degrees, and special program designations, and knowledge of application of campus resource guidelines for making determinations using various criteria.

Ability to be thorough, consistent and accurate in the interpretation of records against criteria; ability to comprehend and interpret complex regulations or requirements and to apply them in the evaluation process; ability to maintain resources which document and update criteria; ability to explain criteria and evaluations to others; ability to make accurate records; ability to organize work to meet deadlines; ability to safeguard the confidentiality and security of records.

### **Evaluator II**

Same knowledges as for the Evaluator I and, in addition, thorough knowledge of resources and documentation processes and knowledge of organizing and assigning the work of a group.

Same abilities as for the Evaluator I and, in addition, ability to interpret and apply criteria related to unusual cases; ability to organize and manage workloads; ability to explain and interpret the application of complex regulations, requirements and criteria to individual students and faculty members; ability to safeguard the confidentiality and security of student records; ability to be responsible for all aspects of a functional assignment; ability to instruct and lead the work of others in making evaluations.

and

**Experience:**

**Evaluator Trainee:**

Equivalent to six months responsible experience involving academic, administrative, fiscal or statistical records processing and maintenance, OR two years of full-time college with course work specific to development of quantitative and analytical skills.

**Evaluator I:**

Equivalent to completion of a formal training program in academic records evaluation OR one year of academic records evaluation experience OR any 12-month combination of training and experience related to academic records evaluation.

**Evaluator II:**

Equivalent to two years of academic records evaluation experience with the full scope of responsibility for making decisions regarding eligibility for the granting of degrees. Completion of a formal training program in academic records evaluation may substitute for one year of the required experience.

**All Classes:**

<b>Work Week Group:</b>	1N
<b>Premium O/T:</b>	Yes
<b>Shift Differential:</b>	No