

Report on the simulated trial evaluations for promotion

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1 Background

1.1 Why simulated trial evaluations?

In academic careers applications for funding projects are common. These applications focus mainly on the research to be performed in the specific project and the potential outcomes. CVs are attached to inform the funder about the earlier achievements of the applicant. When applying for a permanent position (lectureship, professorship) a further emphasis is put on the candidates' teaching skills and administrative skills in addition to the number of publications and other research merits. There could be obligations to make broader statements about future teaching and research plans.

During the preparation of an academic portfolio (see *Appendix 1*) topics such as the candidate's research philosophy and pedagogical approach are addressed.

If one has written an academic portfolio a large part of the work for future applications to lectureship or professorship is already done and the content and reflections are concisely summarized.

1.2 Where did Baltic Gender get the inspiration to this task?

The idea with trial evaluations originally came from a career promotion project at UiT, The Arctic University of Norway. That project aimed to increase the proportion of women professors from year 2010 to 2015. One part of the career promotion project was an evaluation of a draft of the promotion application and the applicant's CV. The reviewer was asked to provide advice on what parts of the CV or the application that needed extra attention for the promotion application to be successful. It could for example be the case that more publications were needed. By receiving support from the department to write a promotion application and by the constructive feedback from the reviewer the aim was to increase the proportion of women professors. During the project time the proportion of women professors increased from 25 to 33%.

Currently a new round of the career promotion project is run by UiT, Norway. This project includes seminars on a range of issues, for example career development, criteria for promotion and how to write a good CV, that the participants are required to attend. Four weeklong off-campus seminars dedicated to individual academic writing are also parts of the project. A significant aspect of the project is also this time the trial evaluation that should help the participant to determine the further academic work needed to meet the requirements of full professorship.

In Baltic Gender we chose to set up trial evaluations of academic portfolios of women near a career step. It could be a post doc soon to apply for a tenure track or permanent position, a researcher close to reaching full professorship or a PhD student that just finished and now is in the process of applying for a post doc position. Academic portfolios were already prior to this project a requirement when applying for a position as a research professor at SYKE, Finland.



1.3 What was the aim of this task?

One of the aims of this task in Baltic Gender was to support individual women scientists in the fields of marine science and technologies in the partner organizations to take the next step of their respective careers. Another was to make a reflection on if and how this task could be developed in the future, within organizations or in cooperation with other organizations.

2 Method

In this task the consortium chose to use academic portfolios (see *Appendix 1*) as the format for the reflection by the candidates.

2.1 How to select candidates in the different organizations

All partners in the project Baltic Gender found appropriate candidates to this task. The processes differed between partners, from an open announcement to all employees to tailored invitations to women that were identified by working group leaders, departments heads or Baltic Gender contact persons as being close to reach the next career step. At this stage the contact persons at each partner organization informed the potential candidates or employees about the background to the task and the potential benefits for the participating candidates i.e. why it is beneficial to have prepared an academic portfolio. In total eleven candidates from the eight partners expressed their willingness to participate in this task. Two withdrew their participation at a later stage due to changes of jobs (leaving academia) and time constraints, respectively.

2.2 How to select reviewers in the different organizations

All partners also invited potentially suitable reviewers for this task. Mainly senior experts were addressed and invited. The names of the potential reviewers were sent to the task leader, who, when the list of candidates was finalized, contacted the potential reviewers and gave instructions on how this task should be performed (see *Appendix 3*).

The reviewers were more senior in marine science and technology than their respective candidates, and most of the reviewers were full professors.

2.3 The process

The process was as follows:

- The task leader (TL) sent out instructions to the candidates and potential reviewers (see *Appendix 2* and *3*).
- Candidates sent their portfolios (see *Appendix 1*), a letter informing the reviewer about the next career step, and documents that could be of importance for the reviewer (regulations on how the next career step is reached etc.) to the TL.
- The TL sent the portfolios and other documents to the respective reviewers and asked them to review within 2 months, if possible.
- The reviewers' assessments were sent to the TL who sent them to the candidates.
- The reviewer also received a reply from the TL saying that they could expect to be contacted by the candidate for a discussion about the written assessment.



- The candidate contacted the reviewer and asked for a one-to-one conversation on the phone, Skype or in person about the assessment and, if the reviewer agreed to that, also on other career-related issues.
- After the conversations between candidates and reviewers the TL followed up with the candidates about their impressions about this task. This part was to give Baltic Gender a sense about if the candidates found the exercise useful, and how the procedure could be improved or implemented in the different organizations. The answers from all candidates were noted in one document without any possibility to track from whom the answers came.

The academic portfolios were reviewed by one reviewer each.

3 Summary of the follow up-discussions with candidates

In the follow-up discussions with the candidates questions were asked about why they wanted to join this task, what opportunities they have today to get similar support within their own organizations, how a task like this could be improved and if they had any overall thoughts in the end. The answers are summarized in the following sections.

Background

Most of the candidates had been thinking about their next career step and thought this was a good opportunity to have someone outside the immediate network to look at how the career has progressed so far. "What can I improve?" and "What direction to take next?" were questions raised by the candidates.

The career steps varied from applying to a post doc position after finalizing the PhD to applying for a full professorship. One candidate expressed that she was a bit unsure about her career and thought that this exercise would help her clarify what options there are.

One of the candidates had assembled an academic portfolio earlier in her career the rest had only written CVs and summaries of their research activities.

Most candidates expressed that they received useful feedback from the reviewers. The feedback spanned from the structure of the academic portfolio, what to emphasize in specific situations, what to focus on to be able to reach the next career step (number of publications needed etc.) and general advice on so-called soft-skills, such as science communication. One candidate received feedback that was not specific enough and felt that the reviewer had not paid attention to the entire academic portfolio.

Organizational opportunities

Most candidates did not have this opportunity within their current organizations. In one organization (SYKE, Finland) the academic portfolio is mandatory in the promotion process to research professor and a candidate from that organization thought that it would be good with more formal instructions of support within the organization also when this project is due. Some mentioned that by attending mentor programs feedback could be received, but that this specific task of writing an academic portfolio often is not included in such programs. How feedback from senior colleagues could be gained depends on the persons involved. One



candidate expressed that senior colleagues have a lot of experience and expertise that it would be good if it could be transferred to younger researchers within the organization.

Improvements

The match-making/pairing of candidates and reviewers could be based on field of research to a larger degree. (*This time it was mainly based on seniority*). And the reviewers should not accept to be reviewers if they cannot find the time to carefully read through and comment on the academic portfolio. If the reviewers are reimbursed (*like in the Tromsø promotion project, see below*) it might be easier to attract reviewers that can spend time on this kind of task. This is something to take into consideration if this task is included in the formal structure of an organization, i.e. not project-based.

Overall thoughts

The candidates agreed on that they would recommend colleagues to write an academic portfolio. Some said if it is needed for a position or career step, since it takes time to write. Others argued that one should start to write on the academic portfolio already at the PhD stage, and then modify and add things along the career. It was good that this task had a deadline so that one took the time to actually reflect and write down what the career had been like so far. All would also recommend colleagues to participate in a task like this, if they were given the opportunity. It was a demanding and productive task but it also made the participants aware of their careers, helped them describe their careers to others and they found it useful for the next career steps.

4 Lessons learned from this task

During the process, including the conversations with the candidates, some further development of this task was reflected upon.

First of all careful selection of reviewers is of importance. Reviewers should have more academic experience than the candidates. There are different pros and cons with reviewers from within the same specific research fields as the candidates and reviewers with broader perspectives, depending on the direction the candidate is aiming at. During this task reviewers with more seniority than the candidates contributed with their experiences mainly as general academics with a long career in the fields of marine science and technology in a broad sense. They were however in most cases not in the same particular fields as their candidates. Therefore the additional documents stating the requirements that need to met to reach the next career step were of utmost importance. Those documents improved the possibilities for the candidate to receive the best possible advice. From the evaluations carried out in this task more senior researchers benefitted (or could have benefitted even more) from a reviewer within their own field. The more junior researchers received more general feedback that was not as coupled to their specific fields of research.

The expectations on the kind of feedback that could be received differed between candidates, from more general “how to take the next step”-advices to “field of research topic specific”-advices and if this task should be implemented in partner organizations or elsewhere these expectations on this specific measure (trial evaluations) should be addressed early on in the process to avoid disappointments at later stages.



The availability of the reviewer after the written evaluation was delivered differed depending on the individual reviewer's schedule. There were difficulties for a few of the candidates to arrange the discussion with some of the busy reviewers. This brings us back to the careful selection of reviewers. It is important to make sure the reviewers have the time needed to invest during the specific period of time. In the career promotion project 2016-2018 at UiT, Norway, all reviewers received a compensation of NOK 15 000, while Baltic Gender did not compensate the reviewers for their engagement in this task. Payment of reviewers could potentially make reviewers prioritize a task like this higher than if they are not paid. We are however grateful to all reviewers that participated with their experience and time in this task.

The feedback from the reviewer was in most cases relevant and constructive, and therefore well received by the candidate. "Someone took the time to help me in my career, that is a fantastic feeling." was one of the comments from the candidates. In one case the feedback was too short to be constructive. In future situations an even clearer description of the reviewer's task and a structured guideline on how to give feedback on the portfolio could be provided by the task leader to further clarify the measure and the expectations.

5 Final words

To set aside the time it takes to write an academic portfolio can help one realize where one is in the academic career. What have I done so far? What do I want to do in the future? Where are my strengths? What parts do I need to work more on to be able to further my career? These are questions that the participants raised as important in the process of writing the academic portfolio.

We suggest that organizations should formalize ways to give constructive feedback on academic portfolios or other documents needed for application to positions or especially to promotion to higher positions within the same organization. Transparent career paths are important in meritocratic systems especially for under-represented groups.

6 Appendices

- 1) Academic portfolio
- 2) Instructions to candidates
- 3) Instructions to reviewers



Appendix 1

Academic portfolio

1. Basic information

- Personal and contact information
- Education and degrees
- Other necessary background information.

2. Research and scientific activities

- Experience in research and other scientific activities
- Research philosophy and ethics, primary fields of research
- Significant publications
- Research assessments and awards
- Activities in the academic community
- Visions and personal development plans
- Other scientific merits.

3. Teaching and supervision

- Experience in undergraduate and postgraduate teaching and supervision
- Pedagogical approach and training
- Published study materials and use of educational technology
- Development of teaching and awards for teaching
- Participation in the assessment and development of teaching
- Strengths, development challenges and visions of one's teaching
- Other teaching-related qualifications.

4. Administration and other activities

- Administrative and management duties
- Duties in one's field outside the University
- Active role in society and positions of trust
- Publications, presentations and dissemination of scientific knowledge through other means
- Other significant merits and duties.



Appendix 2

Instructions to candidate

One of the aims with Baltic Gender (www.baltic-gender.eu) is to improve the career possibilities for women. You have been selected by your partner organization to have the opportunity to receive feedback on your academic portfolio as a preparation for the next step in your career.

Depending on where you are in your career or in what country you want to take the next career step the content of the academic portfolio could differ (a general suggestion on the content and format of an academic portfolio is attached). Below we shortly describe the timeline for this task.

In **September** (no later than the 18th) you send

- 1) your academic portfolio
- 2) a letter that describes the next step you want to take in your career (to inform the reviewer what you are aiming at)
- 3) if applicable, any documents or rules that you need to adhere to in order to reach the next step
- 4) other information that could be important given that the reviewer may be from another country

to johanna.stadmark@geol.lu.se

The feedback from the reviewer will be sent to you **before the end of November** (in most cases it will not take the entire 2 months and you will receive the response as soon as possible). There will then be an opportunity to discuss the feedback with the reviewer via Skype or, if applicable, in person.

For the completion of Baltic Gender's deliverable to EU on this task you will be contacted by the task leader (Johanna Stadmark, Lund University, Sweden) twice (shortly after the feedback has been given and approximately 6 months later). The deliverable will describe the process and the estimated impact of this task.

If you have any questions please send an email to johanna.stadmark@geol.lu.se.

Best regards,

Johanna Stadmark



Appendix 3

Instructions to reviewer

Firstly we want to thank you for contributing with your expertise to further the career of women in Marine sciences! This task is a part of the project Baltic Gender (<https://www.baltic-gender.eu>) funded by Horizon 2020.

The procedure will be:

Mid September

The candidate submits an academic portfolio together with a letter describing the next step in the career that the candidate is aiming at to the task leader. The content will, at least partly, follow the template below (end of this document, *Appendix 1*).

Mid/End September

The task leader sends you the documents submitted by the candidate.

October 2017 – January 2018

We kindly ask you to:

- 1) provide constructive feedback on the candidate's academic portfolio, for example:
 - a. Is the candidate aiming for a career step that is suitable at this stage of the career? (Are the merits enough?)
 - b. Are there areas in the academic portfolio that the candidate should focus on in order to be better off in future competitive applications (expanding the research group, teaching, fieldwork, leadership etc.)
 - c. Other suggestions
- 2) submit your review to the task leader (johanna.stadmark@geol.lu.se) no later than the 24th of November,
- 3) have a Skype-conversation with the candidate providing the candidate an opportunity to discuss the feedback in more detail if needed. **At this stage the reviewer is not anonymous to the candidate.**

