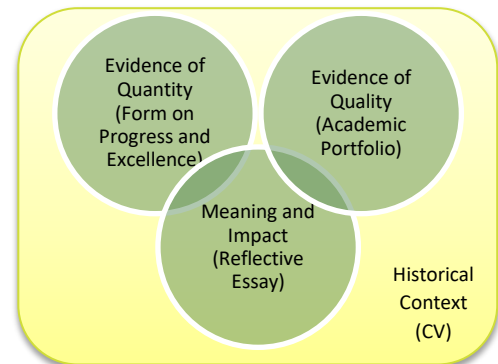# Developing an Academic Portfolio

Three Key Points

1. An academic portfolio is not simply a scrapbook.
2. An academic portfolio is a compilation of evidence of the quality of the faculty member's work in the areas of review during the review period.
3. An academic portfolio should be constructed using the template provided on the College of Human Medicine Promotion and Tenure website, which is aligned to the criteria for the action sought.

Introduction

College of Human Medicine (CHM) faculty members applying for reappointment, promotion, tenure and continuing status should carefully review the requirements for their application. Applicants are responsible for familiarizing themselves with the specific application criteria, policies, procedures and documentation required in their department's reappointment, promotion, tenure and continuing status guidelines. All university and college forms, instructions and documentation requirements can be found at https://humanmedicine.msu.edu/faculty-staff/faculty-affairs/promotion/index.html.

All CHM faculty members are required to submit an academic portfolio as part of their application for promotion, tenure or continuing status. Reappointments in the tenure and continuing academic specialist systems and applications for Designation B status for UNTF positions also require an academic portfolio.[1] The academic portfolio is a compilation of evidence of the **quality** of the faculty member's work in the areas of review during the review period. The academic portfolio complements evidence of the **quantity** of accomplishments during the review period summarized in the Form on Progress and Excellence. The narrative story of the **impact and/or meaning** of these accomplishments is provided in the reflective essay.[2] Along with the CV, which provides historical context for the accomplishments during the review period, these three components are the core of the faculty member's application.

At each step of the review process, reviewers add to the dossier. For some actions, external reviewers with experience and expertise in the field provide commentary on the faculty member's contributions to that field. Department RPT committees incorporate commentary from external reviewer letters with information about the faculty member's expected role, annual review feedback, evidence of accomplishments and provide a recommendation to the chair based on department criteria. The chair conducts an independent review, taking into account the committee's advice, and is responsible for advancing the department's recommendation to the

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[1] Review actions that do not require an academic portfolio include reappointments in other systems, including the health programs and clinical/adjunct non-prefix systems, and promotions in the clinical/adjunct prefix system. However, applicants for these actions are invited to provide "additional evidence" to support their cases. If an applicant chooses to provide that evidence, applying principles from this guide will make those materials more useful to reviewers.

[2] An optional COVID-19 Impact Statement can be provided separately, or details of the impact of COVID-19 on the accomplishments during the review period can be incorporated into the Reflective Essay.

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college. Similar college-level processes based on the college-level criteria and departmental commentary result in a recommendation by the dean to the university.

Approaching Your Portfolio

To be effective and efficient in the preparation of your portfolio, you need to consider the rhetorical context:

- Who is my *audience*?
- What is my *purpose*?
- What are the conventions of this *genre*?

Keeping the *audience* in mind informs your decisions about what to say and how to say it. In fact, consider the audience throughout your work on your dossier, not just the Academic Portfolio. Seek insights from mentors and supervisors about how reviewers at each level use the criteria to make their evaluations of the content of the dossier. Keep in mind that the portfolio is typically not sent to external reviewers[3] and it not sent to the university.[4] The audience for the portfolio is **the review committees**, who are your colleagues at the department and college levels, the **chairperson**, and the **dean**.

The *purpose* of the portfolio is **to make the review process easy on the reviewers**. The less the reviewers must search for evidence that criteria are met or wonder about the relevance of the materials provided, the easier their job will be, and the clearer your argument for reappointment, promotion, tenure or continuing status will be to them.

Any literary *genre* has conventions for form, style and subject matter. Following those conventions helps a reader engage with the substance of your portfolio quickly and helps you accomplish your purpose for producing it. See the Organization and Submission section of this document for details about the form, style and subject matter that will make your portfolio familiar, intelligible and useful to your reviewers.

Getting to work

Beginning in the first year of appointment or first year of the relevant review period, a faculty member should:

- ☐ Study the criteria for the next RPT action for their appointment type.
- ☐ Make note of accomplishments that address criteria
- ☐ Collect potential portfolio artifacts: significant academic products and other supporting evidence which document the quality of accomplishments during the review period.

To effectively study the criteria, put yourself in the shoes of a reviewer. As you read each criterion, think, "what would convince me, if I was a reviewer?" Reviewers will be looking for evidence of "sustained excellence" over the review period. They want to know how many relevant accomplishments there are, but also how significant those accomplishments are. In your Form on Progress and Excellence, you will summarize how many – publications, grants, advisees, courses designed and/or taught, committees served on, etc. In your portfolio, you will sample from these instances to provide more detail on the quality and significance. Reviewers need to weigh quantity and quality together to determine if the criterion is met, so whether you have a lot of accomplishments to report in a category or a little, the quality of those accomplishments needs to be clear to reviewers.

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[3] Check departmental procedures.
[4] During university review, the portfolio (your argument for quality) is functionally replaced by the summary evaluations from the chair and dean.

When meeting with mentors that are assisting you with the RPT process, make sharing your developing portfolio a part of the process. Mentors with experience in the RPT process can help you match specific accomplishments with the criteria they address. Bring them specific questions, such as:

- ☐ Does this artifact convince you I've met the criterion?
- ☐ Are there other things reviewers may be looking for?
- ☐ Is it easy to understand my argument for quality and significance?
- ☐ What would make this more compelling or easier for the reviewer?
- ☐ What else should I include?
- ☐ What can I omit?

A portfolio is by necessity a sample of your work. Sampling effectively is key. Here are some things to think about as you sample:

1. Your CV and your Form on Progress and Excellence have achieved the *broad* sampling of your accomplishments, by listing (in the case of the CV) or quantitative/thematic summarizing (in the case of the Form on Progress and Excellence). In the portfolio, do *deep* sampling – a small number of examples with enough detail to illustrate what is excellent about the work. For teaching, you might illustrate innovative, effective course design or instructional techniques from the course or two in which you have invested the most energy. In research, you might illustrate the professional or community partnerships, practical outcomes or further developments that contribute to the excellence or impact of your one or two most important funded grants, or you might want to illustrate some of the non-peer reviewed, perhaps popular or community-based outlets for your work and/or the abstracts from your most important peer reviewed journal articles or conference proceedings and explain what impact they have had. In service, illustrate the products of your most important contributions, such as the program of a conference, meeting, or lecture series you helped plan, or the annual report of a committee you led.

2. It is important to use multiple measures to triangulate your claims of excellence. The [provost says]:

   > It is expected that multiple methods for assessing performance be used in assessing research, teaching and service. For example, the sole use of student evaluations of teaching is inappropriate as a means for assessing teaching effectiveness. Among other concerns, research has demonstrated bias in student evaluations of teaching relative to underrepresented minorities and women.

   CHM criteria are set up to help you achieve triangulation, for example by calling for evidence that you are producing and using quality teaching materials, evidence from students that teaching is effective, and evidence from colleagues that teaching practice is high-quality. In every area, find ways to provide evidence that you demonstrate known features of quality work; that patients, students, peers, colleagues and/or leaders agree your work is good; and that you have produced demonstrable impacts.

3. Use your portfolio to point out aspects of quality in each area of review that are harder to ascertain from the CV, such as impact on diversity, equity and inclusion, impact on the broader community, important collaborations and synergies, cross-disciplinary connections, etc.

By the middle of the review period, you should begin to organize the available artifacts by the area(s) of review and specific criteria for the appointment system and rank you are pursuing. Some appointment types have a reappointment review process, commonly every three years, and preparing an academic portfolio for these reviews is helpful to the reappointment review process. By the second half of the review period, incorporating your evolving portfolio into your annual review process or regular meetings with mentors helping with the RPT process is a good idea. The artifacts of quality you present there will help these reviewers understand your progress and impact and provide helpful suggestions about efforts you should focus on for the remainder of the review period before your next promotion.

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At the end of the review period, curate and prune. Use the template corresponding to the action sought, as provided on the [Promotion and Tenure](#) website. For each criterion you will address, prepare short summaries (1-2 paragraphs) that summarize your case that the criterion is met. List the artifacts that support your case. Review across your gathered artifacts and eliminate redundancies. Strive for concise, clear arguments.

Potential Artifacts

The genre of the portfolio is a bookmarked .pdf document. It is composed of documents (text, charts, clippings, screenshots, etc.). These pages can contain external links to other items. Do not expect that reviewers will review externally linked items, but they may sample from the links you provide to further understand quality or establish veracity.

The lists below provide examples of documents and other supporting materials to collect in support of each area of review. They are illustrative, not exhaustive.

Instruction

- Course, clerkship, workshop and seminar teaching evaluations and comments
- Letters from students, peers, and supervisors documenting quality of teaching
- Syllabi, presentations, demonstrations, handouts, assessments, educational software or websites, and other instructional materials you developed, independently or as part of an instructional team
- Materials you developed for use in your advising and mentorship activities
- Evaluations and comments from mentees/advisees
- Evidence of participation in curriculum revisions, including roles played and products produced (independently or as part of a curriculum design team)
- Awards, honors or other recognition for excellence in teaching, advising or curriculum design
- Achievements of mentees

Research, Creative and Scholarly Activity

- The citation and abstract, along with applicable metrics of quality (e.g., journal rankings, citation analysis) for
  - Books, chapters or monographs published
  - Peer-reviewed manuscripts
- Peer-reviewed posters
- Professional meeting peer-reviewed and invited oral presentation materials such as slides or handouts
- Documents illustrating quality of grants, such as evidence of impact, media coverage, partnerships or networks built, etc.
- Reviews or evaluations of your scholarly products
- Awards, honors or other recognition for excellence in research, creative and scholarly activity
- Unsolicited testimonials, letters, etc. about the importance or impact of your scholarly work

Professional Service

Includes service within the profession and service to the broader community as a member of the profession.

- Evidence of **substantive participation** in national, state, regional and local professional organizations.
- Evidence of **leadership** from elected or appointed positions in professional organizations
- Evidence of quality manuscript, annual meeting and grant review activities
- Evidence of quality consulting and technical assistance activities
- Participation in relevant community boards, with evidence of engagement/impact
- Expert consultation to media outlets, with evidence of engagement/impact

- Invited presentations to other professional audiences/communities, including materials such as slides or handouts, feedback and evidence of impact.
- Unsolicited testimonials: letters, emails, etc. related to excellence in professional service

Committee and Administrative Service
- Documentation of excellence in department, college and university committee assignments
- Products generated by committee/administrative work
- Committee and administrative leadership appointments/elections
- Participation in leadership development programs
- Participation in community activities as a representative of the department, college or university
- Awards for excellence in committee service or other forms of professional recognition
- Unsolicited testimonials: letters, emails, etc. related to excellence in committee and administrative service
- Evidence of effective administrative service, such as leadership/advocacy, management/stewardship, impact, communication/culture building, etc.

Clinical Service (where applicable)
- Clinical excellence ratings by patients, peers and supervisors
- Evaluations by colleagues reflecting excellence in patient care
- Evidence of being highly sought-after for clinical services
- Practice-based performance data
- Board and relevant skills certification
- Professional development activities
- Leadership in the development of innovative clinical practices
- Evidence of achieving national benchmarks for clinical productivity
- Participation in quality assurance programs and evidence of impact
- Awards or other recognition for excellence in clinical practice

Note: the required external review letters are solicited by the department and are not made available to the applicant. They are not part of the academic portfolio. They will be available to the department, college and university reviewers. See https://chmfacultyaffairs.msu.edu/documents/CHM_Letters_of_Reference.pdf.

Organization and Submission
This section includes details of the genre conventions for the academic portfolio.

Length
Each applicant's portfolio will vary as a function of appointment type, assigned effort and action sought, among other considerations. The complete application packet, including the portfolio and other required documents added throughout the review process, must be no more than 500 pages total.

An academic portfolio is not a scrapbook. Do not include everything you have collected. It would be overwhelming for any reader, even one that knows you well and cares about your success. Reviewers at all levels report that an effective case can be made in much fewer than 500 pages, and that longer dossiers are typically not stronger, but rather can be rambling and disorganized. You want to maximize reviewers' understanding of your argument for quality in the smallest amount of time possible. Think about the best way to spend their time and curate the portfolio to achieve this goal.

Creating Impactful Artifacts

It is not necessary or useful to use the portfolio for a comprehensive re-listing of all the items in your CV during the review period. Focus on details of the quality of that body of work that are not captured in a list of activities from the CV or Form on Progress and Excellence. When considering adding artifacts, think:

- Are more examples that are essentially equivalent useful to my reviewer?
- Are more examples useful if a reviewer will not be able to understand their quality/relative quality?

On the other hand, establishing a "sustained record of excellence" is a requirement for promotion, so include enough examples to show excellence over time for the review period. It is probably never useful to provide more than 3-5 examples (most important publications, best course designs, most glowing feedback, etc.). Be sure you can articulate what each example you include adds to the case you are making for excellence.

Several areas of review can be addressed with **ratings from evaluation systems**, such as SIRS/course evaluations, clinical practice evaluations, etc. Often, the formatting of the reports you receive from these systems results in very long documents. Long reports are hard for reviewers to use, and they may not notice what you want them to notice. They will also be interested in how you have responded to the results. When providing evaluation system data, you do not need to include the entire original multi-page report. A one-page summary of item responses and a representative sample of comments is easier for a reviewer to digest. Include with this your interpretation of the results and how you have used them to strive for excellence. House the full report in a cloud storage location (OneDrive, Google Drive, etc.) and provide a link to the file for reviewers to access if they desire.

If including a **presentation slide deck**, do not insert the full presentation with one slide per page. If the overall structure or sequence of materials is important, use a layout that shows multiple slides on a page. If a couple of key slides best illustrate an innovative explanation, demonstration or learning activity from the presentation, provide just these as an excerpt. Either way, include annotations that explain to a reviewer what you want them to know or notice about the slides.

Assembling the Portfolio

Dividers

Begin with a Word document that lists each of the criteria for the rank sought on a separate page. These can be found with the other materials on the CHM Promotion and Tenure pages, specific to your appointment system. Remove any criteria you will not be addressing (e.g., remove clinical practice criteria if you are not a clinician). Take out any distinguishing criteria that you have not met and that will not be part of your case.

Below each criterion, summarize your case that the criterion has been met with quality. Keep this to a paragraph or two.

Below the paragraph, list the artifacts available in the portfolio that support the case, in the order you will present them. Create short, descriptive titles that you can also apply to each artifact.

> **Instruction**
>
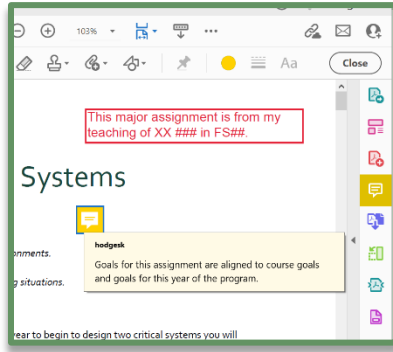> **5. Participation in course or c[u]assessment programs of their university.**
>
> In 2021, I began development of XXX … D work, I developed a hybrid module that … a in a project … that students were invited to
>
> Each year, the course was further refined.
>
> - In 2022, I …
> - In 2023, my colleague XX and I…
>
> Module syllabus
>
> 2023 Project description

Annotating Artifacts

To prepare each artifact, convert to a high-quality .pdf. Avoid scanning or photographing things – use "save as .pdf" or "export to .pdf" functions in applications like MS Word, Excel and PowerPoint and in browsers. If you scan or photograph, make sure the scan is very high quality. Difficult-to-read files are not helpful for reviewers.

Once the artifact is in .pdf form, use the Comment tools in Adobe Acrobat Reader to annotate the file. Use a text comment or text box to add the name/title of the artifact on the first page of any artifact that does not already have one, matching the title used on the Word doc summary. Use comments, highlighting, stamps or drawings to draw attention to anything on the document that the reader needs to know or understand to appreciate its significance.

Final Assembly

Departmental RPT staff support persons will complete the final assembly of the dossier, including the inclusion of annual reviews and external letters, using the university-provided bookmarking order and the guidance you have provided in the Word document. Use the method requested by your departmental RPT staff support person to submit your materials.

Getting Help

Mentors can help with guidance throughout the review period on allocating effort to ensure a successful case and on reviewing materials periodically during the review period to provide advice on sufficiency.

As you near your submission deadline, consider sharing materials with a peer on a similar timeline to get a fresh set of eyes on your materials. Peers can help with general feedback on the clarity of artifacts and the consistency of data and claims across the portfolio. They can also help you locate redundancies in submitted artifacts.

Department RPT staff representatives can provide additional assistance with using Adobe Acrobat Reader to create .pdfs and annotate documents.

The CHM FAD Office is available throughout the career life cycle for advice on college criteria and processes, tips for organizing materials, and information about college and university faculty development resources. Contact us at chm.fad@campusad.msu.edu or (517) 432-8722 to arrange free one-on-one consultation.