Balanced Case
Wait:

- School of Engineering and Technology
- School of Science

*Purdue University controls promotions* and does not recognize balanced case

- Library

*IUPUI P&T standards require *excellence in performance* for librarians*

- School of Medicine

*The Dean does not allow balanced cases*
Comparing Case Types
Overall case types: 2018

IUPUI

99 non-librarian cases

Excellent in:
Research: 47
Service: 31
Teaching: 16

Balanced: 5 [all for full]

Bloomington

112 non-librarian cases

Excellent in:
Research: 94
Service: 1 [promotion to full]
Teaching: 6 [5, promotion to full]

Balanced: 10 [9 for full]

Balanced case is *not discouraged by the campus*
Balanced case is treated carefully—as all are—by the campus committee
Balanced case is not automatically an “all-read” (problem) case
Balanced case for non-tenure track faculty

Lecturers: Can only pursue promotion on the basis of excellence in teaching.

Clinical faculty: Can pursue promotion on a balance between service and teaching.

Check your school standards to determine what “highly satisfactory” means for your faculty type.
Defining Balanced Case

IU Policy: ACA-38 Faculty and Librarian Promotions
“In exceptional cases, a candidate may present evidence of balanced strengths that promise excellent overall performance of comparable benefit to the university.”

IUPUI P&T Guidelines: p. 29
“Balanced case: In some circumstances, faculty may present a record of highly satisfactory performance across all areas sufficient to demonstrate comparable long-term benefits to the University. If so, tenure-track faculty have the option of presenting a balanced case dossier across all three areas of endeavor (teaching, research, service) while clinical-track faculty have the option of presenting a balanced case across two areas of endeavor (teaching, service). It is understood that peer-reviewed scholarship is required for achieving a highly-satisfactory rating in each area of performance in a balanced case.”
Satisfactory - Highly Satisfactory - Excellent

- Satisfactory $\leftarrow$ internally focused (for teaching and service; some dissemination for research)
- Highly satisfactory $\leftarrow$ at least: some peer-reviewed dissemination
- Excellent $\leftarrow$ for tenure-track: emerging (associate) or established (full) national reputation
  - $\leftarrow$ for NTT: national dissemination; see school standards
Strong balanced cases include:

- Performance in each area that is definitely, visibly, beyond merely satisfactory
- A coherent integration across areas
- Intentionality: not “not excellent therefore balanced”
- Overall benefit to the University, tied to the unit’s mission
Focus ↔ Balanced

Most cases for *excellence* in research/teaching/service are built around a **focused area of effort:** one achieves an emerging or established national reputation in a particular topical area.

*Narrower = easier*

*Balanced cases* are built upon effort that is spread across and integrated among teaching, research and service.

*Broader = more balanced*
For *tenure-track* faculty: Binning* on the CV

<table>
<thead>
<tr>
<th>Types of cases</th>
<th>Dissemination</th>
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<tr>
<td></td>
<td>Teaching</td>
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<tr>
<td>Excellence in</td>
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<tr>
<td>Teaching</td>
<td>X</td>
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<tr>
<td>Research</td>
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<td>Service</td>
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<tr>
<td>Balanced case</td>
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*Binning: for grants, presentations, and publications, each one is marked with one “area:” teaching, research or service*
Binning → Your decision

Your Candidate Statement tells the tale of your integrated life as a faculty member.

Your CV inventories your work products into different bins (categories).

**Life does not equal work products**

One integrated endeavor can have distinct and different work products.
Example:
A 200 year old graveyard is in the path of a freeway

I am a social historian

I create a topics course in which students work to inventory the graveyard

I compare the data from this graveyard to similar graveyards in other states, finding that family groupings are larger in this Indiana graveyard than those in Missouri

I testify before the state legislature on proposals to require freeway plans to include graveyard movement plans
Example: A 200 year old graveyard is in the path of a freeway

Endeavors

I am a social historian

I create a topics course in which students work to inventory the graveyard

Presentation at the Public History Conference: Teaching Students with Gravestones - Teaching

I compare the data from this graveyard to similar graveyards in other states, finding that family groupings are larger in this Indiana graveyard than those in Missouri

Article in Annals of American History: “Families: Nuclear or Extended, in Graveyard Groupings” - Research

I testify before the state legislature on proposals to require freeway plans to include graveyard movement plans

Published testimony, cited by other organizations; Standards created - Service
Less integrated example:

I was trained as a textual editor

My research passion is late-medieval literature

I write articles about textual variations in *Le Morte D’Arthur*
  I publish articles and edit a volume of medieval poetry

I teach first year students in basic composition; I teach senior English major capstones
  I publish articles on using primary sources to teach basic composition

I lead the campus committee on writing across the curriculum
  I give presentations on assessing the impact of writing-across-the-curriculum
The point of dissemination is:

If you are doing a good job, **share it**.

If you have a good idea, **share it**.

Let others build upon your work.

Appropriate methods of dissemination are very field or context-specific.

For non-traditional forms of dissemination (everything besides journal articles with citation indexes):

Ask the University Library!
They will show you how to preserve it for future retrieval
They will help you document impact
[Here](#), or your school’s liaison librarian
External reviewers and other people to provide input

External reviewers must be:
- Academics. One or two might be non-academics, but the chair needs to make a strong specific case for their expertise in evaluating scholarly value.
- At the desired or higher rank; at a comparable or higher institution
- Not co-authors, co-PIs, or mentors
- Able to review and evaluate the candidate’s work; they do not need to be experts in all aspects.

Margie Ferguson and Rachel Applegate can help chairs brainstorm reviewers

Chairs can solicit other letters:
These letters go into a special non-candidate folder. They are more valuable than candidate-solicited letters, but less than external reviewers.
- Especially valuable for service (and sometimes teaching) where there are limited formal publication products
- Clients and partners in projects can provide their perspectives
- Especially appropriate for experts who are not academics
Back to basics

• Look at your CV. **Color-code** it as to *potential bins*
  - If going for **full**, **mark in-rank** items
  - Note all student co-authors
  - Mark *multiple bins*

• Who are you? Develop a 1 paragraph, 4 minute, *elevator speech*
  - I do this, because that, which advances my program/unit

• What is your timeline?
  - Next steps in strengthening your CV and/or your statement/case
Discussion - Panel
Panelists

- Greg Hull
  - Herron School of Art and Design

- Thom Upton
  - School of Liberal Arts

Feel free to ask for individual follow-up: rapplega@iupui.edu

Send your CV
Draft your elevator speech
Think about what your chair thinks
Thank you!