ACUMEN

academic careers understood through measurement and norms

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Author(s)	Fleur Praal, Hadas Shema, Inge van der Weijden, Judit Bar-Ilan, Amalia Mas Bleda, and Paul Wouters
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EUROPEAN COMMISSION

SEVENTH FRAMEWORK PROGRAMME

Introduction

In this report, the various modes of feedback received at the Madrid Workshop on 13 December 2013 will be synthesized. It consists of four parts: a protocol for testing the portfolio; an interpretation of the comments participants have written on portfolio testing documents; feedback delivered during field-specific group sessions; and a report of the resulting plenary discussion.

Madrid Protocol

The ACUMEN consortium organized a deployment workshop to test the portfolio in Madrid on 13 December 2013. CSIC hosted the event and invited a delegate from the Spanish Foundation for Science and Technology (FECYT) for a keynote address and a presentation of their CV policy. The program included introductory presentations on the ACUMEN project and the portfolio as well as extensive user tests from two perspectives.

The target audience for the event was early-career researchers (PhDs and post-docs) from a wide representation of fields. Approximately 60 participants were expected, all working in Spain. Besides a user test from the early-career perspective, we developed a test for the early-career participants to use the ACUMEN portfolio for their supervisors' representation as well.

Testing Portfolio Concept

The outline for testing ACUMEN's portfolio in Madrid was =based on two test cases, to maximize engagement with the portfolio. However, this was not feasible due to time constraints, partly caused by the allotted slots for the FECYT. After deliberations, it has therefore been decided that there will be one comprehensive user test.

The test was geared towards gaining conceptual feedback on the contents of the portfolio, rather than aiming for on-the-spot filling out of details. Participants were asked to engage in a fictive job application for their next dream job, to be able to assess how useful the portfolio is in that case. As we were aiming for feedback from researchers from different career stages, we endeavored to address not only PhDs, but also more senior academics that attended the session.

In preparation for the user test, portfolio templates were constructed and ready for dissemination, online or elsewhere; we also brought user test cases as additional and explanatory materials. Complementary, the posters and brochures created for the Utrecht (see MS4) were also used in Madrid.

The Even programme was as follows:

9:30-10:15 Introduction to ACUMEN
10:15-11:00 Introduction to FECYT-CVN
11:00-11:30 Coffee Break
11:30-12:00 Introduction to the Portfolio
12:00-13:30 Portfolio Exercise

13:30-15:00 Lunch

15:00-15:45 Feedback from morning sessions
15:45-17:00 Technical Session FECYT-CVN

Part A: Written comments by participants

Set I: junior researchers in Food Science & Technology / Veterinary Sciences

'Academic age calculation' is one of the most discussed issues. Participants consider it is useful for them and they like the fact of taking into account different personal situations. However, they think it is sometimes difficult to determine the start date of the PhD. One of the participants believes the PhD defense should be the starting point of the calculation. The third participant considers that the exacting start date of PhD should be included, because it is not the same to start January 1st and December 1st; and he does not agree with the illness-related time off work, because he thinks the allowances for less than 6 months also should be included.

These participants consider the sub-portfolio 'Expertise' useful as CV augmentation. They think providing evidence for demonstrating many types of expertise is important, but difficult. Two participants consider 'Scientific/scholarly expertise' especially useful and relevant, but they think it should be better explained and exemplified, because it is not very clear. Concerning 'Knowledge transfer' they think that the number of reviews should be taken into account, and projects with companies can be considered as technological transfer private funding. Concerning 'Technological expertise' they think both software use and data management should be better explained.

These participants also consider overall the sub-portfolio 'Output' useful as CV augmentation and they think it is good to show the "hidden" CV. However, concerning the specific sections, there is no agreement about if 'communication to the general public' and 'teaching' is useful or not. 'Web and social media academic communication' and 'datasets, software, tools, instruments' seem irrelevant or not useful for the participants.

The sub-portfolio 'Influence' is considered useful as well, but it seems 'influence on education' is not important for these participants.

Set II: PhD candidates in History

Both participants advise ACUMEN to reconsider the start date of the PhD as the baseline for the calculation and rather take the PhD defense, or allow for both and have the portfolio owner explain the choice made. The participants do not find clearly stated what is considered part-time work; especially, substantial non-research tasks (such as teaching or management) can be included in grant frameworks or institutional tenure tracks.

On the 'Expertise' sub-portfolio, one participant suggests it might be helpful to include some kind of quantification or point system with the individual items. One way of quantifying 'Educational expertise' would be to list the number of ECTS (or hours) taught, instead of course titles. Participants do not think it useful to list courses taught and developed separately, because the two usually overlap. In general, the participants consider the 'Expertise' sub-portfolio useful as CV augmentation or replacement, but some types of expertise are irrelevant to them because of their field (software, data management, tools, lab equipment) or career stage (knowledge transfer). One participant further notes that 'Methodological expertise' is a topic that is hotly debated and not easily established in his field of research.

The 'Output' sub-portfolio is considered highly useful, although not always completely clear. One participant suggests to limit the 'Output' to the most recent output only, for instance the last five

years. Participants ask whether they can list conference presentations that have not been published. Furthermore, one participant advises against listing book reviews and editorials together with theses, because "these are very different types of work". This same participant does not believe works of fiction can ever be academically relevant.

These participants have not yet filled out the 'Influence' sub-portfolio. Upon request, they say they believe this sub-portfolio is generally least useful to them, given their career stage, and that they do not feel fully equipped to deliver feedback on it.

Set III: Physics

This set consisted of three researchers, a department head, a researcher and a senior researcher.

One senior researcher has only filled out some sections of the Portfolio, but provided ample margin comments. In general, this researcher finds the Portfolio useful as CV augmentation, especially for reviewers of job applications, who can immediately see the qualities the portfolio-owner chose to highlight. He also finds the calculation of academic age useful, especially for working mothers, although he wonders whether management duties can be circumstance for special allowance.

The three sub-portfolios are generally considered useful, but repetitive and overly detailed. This researcher suggests to combine the 'Output' and 'Influence' sub-portfolios to a certain degree. He also notes that some items, such as language skills and writing skills, are irrelevant in his field of science; and that others, such as lab expertise, tools skills and software skills are mostly useful to researchers in an early stage of their career. This researcher is moreover skeptical towards bibliometric indicators (in general, not specifically the ones chosen in the Portfolio), and he is not sure whether a distinction between 'theoretical expertise' and 'originality' can be made, at least in his field.

It is striking that under "educational experience", this participant has listed management courses he has *taken*, while ACUMEN aimed to have portfolio owners include classes *taught* here.

The other two participants have not filled in the narrative (due to time limitations in the workshop).

The department head does not agree with subtracting time for children from the time since the PhD for academic age calculation. It is difficult to provide evidence for the theoretical expertise. She found it difficult to distinguish between entrepreneurship and academic age. Re teaching, she asks about off-campus teaching and individual courses to PhD students. Should they be counted in as well? The expertise section of the ACUMEN portfolio is filled in in detail and she finds it very to generally useful. Regarding the output section, for her field conference papers are irrelevant. There was not enough time for her to fill in the ACUMEN portfolio as a whole.

The senior researcher finds the academic age calculation useful. The same holds for the expertise part, in which he fills in almost all the boxes. This participant is also still busy with filling in the portfolio when time is up.

Set IV: Library & Information Sciences

There were three participants from this discipline: one professor and head of department, one junior researcher with a Masters degree considering starting her PhD, and a librarian not involved in research. Only the junior researcher provided a general sketch of how she would fill in the portfolio for

some of the elements, the other two participants just provided comments. The junior researcher did not provide any written comments.

The professor thought that the portfolio could replace the CV, the librarian on the other hand considered it as augmentation, but she commented that she liked the narrative as it allowed introducing herself in an informal way.

Both the professor and the librarian added deliberations on the academic age, the professor thought that the start date should be the date of defense, and to take account only children born after the defense. The librarian commented on the special allowances; she mentioned taking care of aging parents and also management duties. They also provided a number of comments on the 'Expertise' sub-portfolio: both participants expressed the need to emphasize more leadership skills, for example by providing evidence of heading teams, providing information of team sizes and international collaboration. These are important points to consider.

The professor would have liked to combine the 'Output' with the 'Influence' sub-portfolio to avoid repetition. Both participants noticed repetition in a number of cases, which have been noted by the ACUMEN-team during the presentation in Madrid as well and thus should be easily corrected. The professor thought encyclopedia articles were not relevant Output, instead she suggested adding for instance coordination or editorship. The librarian on the other hand wanted to extend this type of output to more general reference works and also to include contributions to Wikipedia.

Regarding educational output, Massive Online Open Courses (MOOCs) and Open Course Wares (OCWs) were also mentioned. The professor also suggested adding repositories to the social websites category, and the librarian thought that we should add Open Access publications as influence on society. She also asked why datasets and applications in the 'Influence' sub-portfolio were included under influence on education. Overall the librarian found that the portfolio was too long and would be too time consuming to maintain and update it constantly.

Set V: Nutritional Science and Technology

Three participants from the Nutritional Science and Technology-field described themselves as a PhD-student; a research professor (PhD obtained in 1989); and a tenured researcher (PhD 1998).

The research professor considered the academic age calculation irrelevant, since "each person has different circumstances". The tenured researcher and the PhD student did find the Academic Age Calculation useful in general, although the PhD-student could not complete the calculation, not having obtained the PhD yet.

The Narrative was found useful by the tenured researcher and the PhD-candidate, although the latter was unsure how she would structure a narrative on her still budding career. The PhD-candidate would consider using the narrative for (job) applications outside academia, too. The professor could see how the narrative would be useful for more junior researchers, but did not see any opportunity or necessity to present a narrative of her own, given the fact that she does not expect any promotion or other change of career.

When completing 'Expertise' sub-portfolio, the participants wondered about the precise definitions of 'theoretical', 'methodological', and 'empirical' expertise. The professor thought theoretical expertise irrelevant in their field; the tenured researcher would have trouble separating methodological and empirical evidence. Both these senior researchers remarked that consulting, as a part of knowledge transfer, is usually done in (corporate) confidentiality, and can therefore not be listed as output or

expertise. All participants found the contents of the 'Expertise' sub-portfolio generally relevant and they found the listing of writing and presentation skills striking, but relevant, although really only the professor had experience with 'public engagement'. The tenured researcher found data curation and data management skills irrelevant.

The 'Output' sub-portfolio was considered relevant in general, although all participants noted some repetition and overlap in it (especially regarding conference contributions and other (invited) talks). The professor would not list students she supervised because she does not deem that necessary; she would elaborate on the work done in the top-3 granted projects rather than listing the projects as such. All traditional output forms, such as books, articles, conference papers, etcetera, were considered highly important, and therefore the PhD-candidate remarked that she could only complete few of these categories. The other output forms, such as magazine articles, popular texts, and social media contributions were considered generally useful, although none of the participants would elaborate on these categories in their completed Portfolios. Both the tenured researcher and the PhD-candidate would use the 'Output' sub-portfolio as augmentation of the traditional CV, "to highlight the most relevant parts". The professor remarked that this sub-portfolio could also function as an analytical tool to review ones own career.

The tenured researcher could not comment on the 'Influence' sub-portfolio, due to time constraints in the workshop. The PhD-candidate and the professor did consider the citation indicators in this sub-portfolio especially relevant, although the PhD-candidate noted that she did not have any citations yet, nor could she list books, invited talks, prizes, editorship, or conference committee membership. The PhD-candidate had not heard of Mendeley before, and did not have a Twitter account or blog, and she remarked that in this respect, the Portfolio functioned as an eye-opener.

The participants concluded the session with the following recommendations:

- Portfolio users need Guidelines on the completion of the Portfolio;
- Portfolio users should be enabled to distinguish between a monograph PhD-thesis and a dissertation based on articles;
- Initial career steps especially are highly individual and therefore non-conformant to any template;
- The definitions for management skills and entrepreneurship should be explicated;
- Mendeley and other reference managers and databases as well quantitative indicators derived from those are usually strongly STEM-oriented;
- The Portfolio is a useful complementary tool to the traditional CV, especially when contrasting the non-chronological Portfolio to a chronological CV;
- On the one hand, the Portfolio presents a 'human' viewpoint instead of a quantitative career evaluation, but on the other hand this can be misused to excuse a problematic career.

Set VI: Biochemistry / Medicine (Inge)

These three participants from the field of Medicine all report that the Portfolio is useful to them as researchers, to structure their own resumé and highlight items that they find important to present. One especially likes the modular set-up of the Portfolio and envisages this as a complement to the CV rather than a substitute. Participants remark that the Portfolio should be optimized into a user-friendly web-service, perhaps customized for different academic fields, for optimal user-friendliness.

They believe the Narrative enables evaluators to get a quick view on the portfolio owner's career, having the most relevant information for the evaluation process ordered neatly at the beginning of the evaluation process.

The Academic Age calculation is considered irrelevant by two of these participants, and the third researcher notes it is not suitable for him personally, only for "special cases". This participant remarkst that the Academic Age-issue should be coordinated and communicated among funding bodies to be useful, since the different agents now manage this completely different in their calls. They also wonder how to calculate one's Academic Age when the PhD is not (yet) finished.

The 'Expertise' sub-portfolio is useful, according to these participants. They do remark that it is very difficult to distinguish empirical and methodological expertise, as these are intricately related in the life sciences. In the 'Output' sub-portfolio, these researchers would opt for a top-5 list for each item; the top-3 is too limited. Otherwise, the 'Output' and 'Influence' sub-portfolios are found useful.

Set VII: Food Science & Technology

The group consist of three participants: A PhD-candidate with research experience, one junior researcher and a senior researcher (with doctorate degrees), all of them specialized in medicine related with nutritional issues. In general, the participants find the Portfolio useful; the only items they mark in other ways are those unconnected to their personal experiences.

At the event, the Narrative was introduced as playing a central role in the Portfolio. However, these participants had left this section blank; one asked whether the narrative text should be similar to the traditional cover letter. The third prepared a short text with several quantitative indicators.

Regarding the sub-portfolio 'Expertise', two respondents requested clarification on how to fill the section on scientific or scholarly expertise, or examples from others; although one of them had actually been able to complete all items in detail. The junior researcher, a practicing Medical Doctor, filled out all the 'Expertise'-fields in depth, except the question on originality/independence. The participants praised the section about knowledge transfer, but related most of their answers to activities or roles in the own academic/research networks (in reviews, internal consulting, working groups), not to spin-offs nor to interaction with industry and other non-academic sectors.

The section for educational expertise is filled by participants with non-permanent courses or seminars, in most cases anecdotal evidence of activity in this field. Surprisingly, no technological expertise is showed. Participants report this is because they "are not involved in lab working". Only (statistical) software is mentioned. English language skills are mentioned by all three researchers, but one of them does not report fluency for conversation. Other languages are also quoted, but no other communication skills. No organizational expertise is included.

The sub-Portfolio 'Output' was left blank by this group, probably due to lack of time or access to the required information. However, it is possible that some of the null answers are genuine zero contributions (books, chapters, textbooks, software, patents, …). The senior researcher asked, interestingly, if only those granted projects in which he is main researcher should be included.

This group of participants did not provide any comments in the 'Influence' sub-portfolio. The non-PhD junior researcher cites a ResearchGate indicator; the senior researcher considers social tools irrelevant.

Part B: Feedback from group sessions

Group 1: Medicine & Nutritional Sciences

This group of participants found the Portfolio a valuable and well-rounded instrument that presents all facets of a researcher, especially in the sub-portfolios 'Output' and 'Influence'. Participants note that the possibility to list societal output and influence as well as awards and non-academic talks are strong points in the Portfolio, which they could probably introduce in Horizon2020-applications. The 'Expertise' portfolio was found very interesting, but also the most difficult to complete. This implies it should be more extensively explained in the Guidelines, perhaps with examples.

Participants from this group do not report any missing items, but they do remark that they would probably have been more equipped to deliver feedback on the Portfolio if they would have been given the Portfolio Testing Document before the actual workshop.

Many sections towards the end of the Portfolio have not been filled out by these participants, who report, upon request, that the document is too long, too detailed and too hard to fill in on the spot. They emphasize the need for the dissemination of knowledge on the Portfolio, because they find it important that its implementation is supported widely, with a global mental change in evaluation perspectives.

The participants advise to generate different prototype-Portfolios, based on fields of science, to facilitate the completion process. They emphasize the need to make the Portfolio easy and uniform, and to be aware that access to specific resources – currently needed to calculate the h-index, m-quotient and other indicators – can probably be limited in some countries.

Group 2: Biochemistry and other Experimental Sciences

These participants identify two key issues that ACUMEN needs to address: the amount of labour that inputting the data will take from users; and the output format. The latter will prove decisive in the uptake of the ACUMEN Portfolio. Generally, participants find the ACUMEN Portfolio quite an interesting concept. In Spain especially, where there is now a huge job shortage and careers develop with high versatility, an ACUMEN Portfolio might help Spanish researchers to move abroad. The ACUMEN Portfolio's usefulness will, however, be limited if it takes too much work to complete. Participants note that processing large CVs might be difficult; they advise to focus on the most important points. A participant, with a permanent job, would not find the Portfolio very useful: "for my funding agencies, my CV suffices". She questions the amount of work, especially for junior researchers. She would prefer a shorter poster format. The same participant remarks that she uses Scopus to verify papers written by a candidate, and that she knows this is standing practice in the industry as well.

Participants believe the Portfolio should also include the standard biographical information of its owner, to permit it to be used as a CV-replacement. They furthermore believe the success of the Portfolio will be determined by both data input method, for which participants would prefer linking between existing platforms, and by its final presentation, which they see preferably as a dynamic web-service.

There is some discussion about the definition of Acacemic Age, which might need to be explicated and consolidated by the funding agency who requests the Portfolio. The relevance of the 'Academic age calculation' is doubted, since senior researchers do not need to account for their entire career path, and juniors are subjected to the different rules of different funding bodies, regardless whether these would be in line with the ACUMEN calculation.

Participants note some redundancy and repetition between the 'Output' portfolio and the other two; and they suggest that ACUMEN could look into methods of enabling portfolio owners to combine modules from the different Portfolios as desired. In general, they believe the Portfolio is a very usable

instrument that would lighten the work for evaluators especially. Regarding knowledge transfer, it is noted that some of this is confidential, especially if companies are involved.

Group 3: Library & Information Sciences, History

Participants in this group are: professor in information sciences; PhD-candidates in history; subject librarian in Biology and consultant in teaching evaluation; and a library professional considering starting a PhD in library and information sciences.

The 'Academic age calculation' is found interesting and useful, but in its current version not yet completely undisputable. The official start-date of a PhD is not always known; especially since many start their research before being formally hired. However, the defense date can also be misleading, since part of the thesis can (or in Spain: must) be published before then, but at least it can be clearly established. It is observed that national systems vary widely: in Spain, PhD candidates are obliged to publish before they finish the PhD, whereas in for instance the Netherlands they can but do not have to, and in Israel this is unusual in the Humanities.

Another issue is found in the subtraction for part-time work, since it is unclear whether management responsibilities, which in Spain are mandatory by law, should be discounted. Similarly, regular teaching loads (in Spain: typically 8 hours per week / 24 ECTS per year for tutors) can be included. Perhaps it is useful to calculate the academic age with the FTE spent on research.

Participants believe there is redundancy in the sub-portfolios. For instance: if a portfolio owner would have developed software tools or instruments, these would be patented or protected with a(n open) license. They also doubt whether downloads, likes and retweets are academically useful, and are unclear what is meant by 'encyclopedia articles': do wiki's count, given the fact that ownership of texts is fluid and cannot clearly be established? The Guidelines should provide more detailed explanation on these items.

In general, participants would have liked to combine items from the sub-portfolios 'Output' and 'Influence', for instance titles and citation statistics, since they believe these two inextricably connected. They also emphasize the importance of mentioning the date when any bibliometric indicators were obtained, since these can fluctuate. As a side note, participants remark that Mendeley is not heavily used in Spain (yet).

Participants from this group believe some items are not included in the Portfolio yet that are important in their fields. Examples given include: size of working teams or collaborating consortia; teaching activities in professional or continuing education; memberships of Academic Societies and such; Open Access publications as a value to society; academic visits (which are especially valued for PhDs in Spain); and editions or translations as scholarly output.

The role of the Portfolio is apparently not self-evident; some participants would use it as CV augmentation, and others rather as a CV replacement. In any case, they find the Portfolio coherent and therefore workable (more so than the current CVN, one participant remarks). They especially appreciate the dynamic, tailor-made character of the Portfolio, although they do note that this can result in laborious upkeeping work, if the Portfolio is used as a continuous online presentation.

Group 4: Physics

These participants believe the Portfolio is a useful instrument to review academic careers, and they envisage how the items in the sub-portfolios could help in structuring and writing an explanatory narrative. It is appreciated that the Portfolio, unlike the traditional CV, is subject-oriented rather than chronological.

The issue of the start date of the PhD as the beginning of an 'Academic age' was also observed in this group, and the date of the first labour contract – including the month! – as a researcher is mentioned as a possible solution. Furthermore, this group observes that women will presumably have more complex academic ages than men, which should not lead to a disadvantage. Lastly, this group suggests to include army duty as a special circumstance in the calculation of the academic age.

Lastly, the group notes that theoretical, methodological and empirical expertise can be hard to distinguish between in its discipline, physics.

Part C: Plenary discussion report

The 'Academic age calculation' seems to be the most heavily debated Portfolio item. The issues stated in the groups (above) are further complicated by the differences in the various national science systems and models of higher education, which have different policies regarding (for instance) publishing during the PhD, management and teaching duties, and (maternity) leave constructions. For these reasons, it will be complicated to create a unified calculation template. Perhaps this calls for making this Portfolio item dynamic, to allow the owner to set up a calculation in line with his career context. One possible unifying solution is to take the date of the first publication as the formal start of an academic career.

In general, many participants find the Portfolio over-encompassing and therefore relatively hard to work through. It would therefore be advisable to develop pathways to a more modular composition of the Portfolio, in which the owner is shown the items most relevant to his field and career stage. For this, a web-service Portfolio would be much better suited than the current long-form.

The ACUMEN-team ensures that a web-service is the ultimate form of the Portfolio, and that the current print is only work in progress. It is noted that national normalized CV-systems gain ground, and that ACUMEN has competition from commercial parties as well, that are developing services partly built in one-directionally in information systems, augmented with more interactive social media. Given this landscape, we are aware that connectors become hugely important and we will make this a main issue in the follow-up. ACUMEN should emphasize the extras a free, open system like the Portfolio has to offer, compared to its competitors.

ACUMEN's ultimate objective would be to allow the portfolio owner to import all quantitative data in the Portfolio, and then write a narrative based on this input. The owner should choose which information is displayed, but all data should be supplied automatically. Importantly, ACUMEN has decided against the use of composite indicators.

The amount of work for portfolio owners can be reduced by streamlining the modular components of the Portfolio, especially since Output and Influence are probably more dynamic than Expertise. The participants stress, lastly, that it is vital to educate evaluators on the Portfolio as well as the owners.

Appendix – Presentation Slides: Introduction to the ACUMEN Portfolio

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Introduction to the ACUMEN Portfolio

The ACUMEN Portfolio is designed as a tool for individual academics to use in situations in which their academic work or career is being evaluated. This could be job applications, grant applications, applications for promotion, but also annual appraisals, job coaching etcetera. A central idea behind the ACUMEN Portfolio is that it allows the portfolio owners to fully present themselves as they see fit in evaluation situations. Current evaluation practices focus too narrowly on particular output of academic work - such as publications - and in very limited ways, namely journal articles. Typically, numbers of citations or an author's h-index seem more important than what the research is about. Other forms of output and other traits of the applicants are under-valued. In particular, the ACUMEN project proposes to include other tasks of academics, such as teaching and contributions to society. Moreover, internet has opened up new ways of collaboration, doing research, teaching and contributing to society. These blogs, discussion fora, Twitter, image and video sharing, crowd referencing with Mendeley, collaborative work with ResearchGate and Academia.edu are usually not included in evaluations.

Please take a careful look at the different parts of the portfolio, provide a sketch of what information you would enter in the different parts of the portfolio, whether the specific elements are relevant for you, and whether there are items that are missing. Please provide your overall impression as well.

ACUMEN portfolio

aim is to give researchers a voice in evaluation

➡ evidence based arguments
➡ shift to dialog orientation
➡ selection of indicators
➡ narrative component
➡ Good Evaluation Practices
➡ envisioned as web service

Name:

Institution:

Position:

Academic field:

Year in which PhD was obtained:

The ACUMEN Portfolio is not necessarily meant to replace the CV but to complement it, at least initially. It is meant as an on-line web-based service that allows individual users to present themselves to particular audiences in concrete evaluation situations. Not all elements are necessarily relevant for every situation – it can be tweaked for a particular purpose.

The ACUMEN Portfolio consists of four main parts: a **narrative** and three sub-portfolios, one for **expertise**, one for **output** and one for **influence**. The narrative is a concise story that gives the portfolio owner's interpretation of his/her development as an academic in the light of a particular evaluation. Because the sub-portfolios contain evidence or references to evidence of your work, the narrative is not merely a story, but an evidence-backed interpretation. Please note that an important functionality of the ACUMEN Portfolio is that for each evaluation or each use, the **portfolio owner makes a selection** of relevant items from his/her portfolio and **determines who has access** to that 'view' for each evaluation. This means that the narrative does not have to use everything in the portfolio and that one may write multiple narratives for multiple selections.

The logic of the sub-portfolios is that initially during training and studies, academics develop certain expertise (knowledge and skills) which they continue to develop during their respective careers. With this expertise they produce output of many different kinds. Through their output academics have influence on the development of their field, but also on teaching and society in a wide sense. Output and influence may further their career, which allows them to develop their expertise, create more or different output. **Thus, an ongoing cycle of events continues to fill, shape and re-shape someone's portfolio.** This is not just a matter of growth and/or decline of publications and citations, but also of changes in research directions, mobility over research institutes and changes in life in general. Contrary to what some forms of evaluation seem to suggest, careers are hardly ever straightforward linear progressions on a career-ladder. The ACUMEN Portfolio is designed to support those contingencies.

Narrative

Narrative		Your comments:
	The narrative gives your personal interpretation of (a selection of) your portfolio. Write it with the situation in which you want to use the portfolio in mind: a job application, a grant application, a presentation for anyone with an interest in your work. *The narrative can be as long as you need it to be, but keep in mind that most people do not have extensive reading time. As a rule of thumb: stick to about 500 words.*	**I find this item is:** O useful to me O generally useful, but not to me O irrelevant

Academic age calculation	*Calculate your academic age here.*	*Number of children raised*: Count each child born since the start of the PhD, for which you were the single main responsible person during the first year from birth. This allowance can be shared between carers (e.g., 0.5 years per child), if agreed by both.
	• *Start date of PhD (year):*	
	• *Correction for part-time work:*	*Part-time work:* Part-time work and having jobs outside academia are important issues in the development of scientific careers and should be implemented in the calculation of your academic age. Subtract the number of years times the FTE spent on part-time work or work outside academia.
	• *Number of children raised after start date of PhD:*	*Special allowances*: Additional special allowances can be subtracted for disability, illness-related time off work (> 6 months), or other unusual cases, but these must be explicitly justified if claimed by the portfolio owner. Claiming these is at the discretion of the portfolio owner. The allowances should be within the spirit of supporting equal opportunities. See here for some related discussions from the UK: http://www.ecu.ac.uk/documents/ref-materials.
	• *Special allowances (describe below):*	
	number of years since start of PhD - correction part-time work - number of children raised - special allowances = **Academic Age =**	The minimum permitted Academic Age is 1.
	Justification for special allowances (if any):	**Your comments:**
		I find this item is: O useful to me O generally useful, but not to me O irrelevant

Sub-portfolio Expertise

When providing evidence for the expertise portfolio, list only the most prominent items for each sub-factor, with a short explanation if needed.

Scientific / scholarly expertise		Your comments:
	Briefly summarise your **theoretical** *expertise. Include evidence to support your claim, such as citing a paper in which you used it.* I find this item is: O useful to me O generally useful, but not to me O irrelevant	
	Briefly summarise your **empirical** *expertise. Include evidence to support your claim, such as citing a paper in which you used it.* I find this item is: O useful to me O generally useful, but not to me O irrelevant	
	Briefly summarise your **methodological** *expertise. Include evidence to support your claim, such as citing a paper in which you used it.* I find this item is: O useful to me O generally useful, but not to me O irrelevant	
	Briefly summarise your **originality/independence** *expertise. Include evidence to support your claim, such as citing a paper in which you used it.* I find this item is: O useful to me O generally useful, but not to me O irrelevant	

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researcher portfolio

Knowledge transfer	**Reviewing:** *Provide up to 3 examples of journals/conferences where you reviewed.* I find this item is: O useful to me O generally useful, but not to me O irrelevant	**Your comments:**
	Entrepreneurship: *List up to 3 entrepreneurship activities undertaken, such as launch or participation in spin-offs, and joint projects with industry, NGOs or government.* I find this item is: O useful to me O generally useful, but not to me O irrelevant	
	Consulting: *Provide up to 3 examples.* I find this item is: O useful to me O generally useful, but not to me O irrelevant	

| **Educational expertise** | *Summarize* **teaching** *done. List only those courses that are most prominent to you.*

I find this item is:
O   useful to me
O   generally useful, but not to me
O   irrelevant | **Your comments:** |

Educational expertise (continued)

List **courses you have developed**, *or overall description of topics and levels of the courses. List only those that are most prominent to you.*

I find this item is:
O   useful to me
O   generally useful, but not to me
O   irrelevant

Your comments:

Other educational experience: *Support your claim with references to, for example, summer schools, field trips, internships supervision.*

I find this item is:
O   useful to me
O   generally useful, but not to me
O   irrelevant

Technological expertise

Briefly summarise your technological **methods** *expertise. Include evidence to support your claim, such as citing a paper, project or a contract in which you used it.*

I find this item is:
O   useful to me
O   generally useful, but not to me
O   irrelevant

Briefly summarise your **tools and lab equipment** *expertise. Include evidence to support your claim, such as citing a paper, project or a contract.*

I find this item is:
O   useful to me
O   generally useful, but not to me
O   irrelevant

Your comments:

Technological expertise (continued)	*Briefly summarise your **software use** expertise. Include evidence to support your claim, such as citing a paper, project or a contract in which you used it.* I find this item is: O useful to me O generally useful, but not to me O irrelevant	**Your comments:**
	*Briefly summarise your **data management or data curation** expertise. Include evidence to support your claim, such as citing a paper, project, or a contract in which you used it.* I find this item is: O useful to me O generally useful, but not to me O irrelevant	

Communica-tion expertise	*List plus level of any formal **language** qualifications gained, or self-assessment.* I find this item is: O useful to me O generally useful, but not to me O irrelevant	**Your comments:**
	Writing skills: *Awards for papers (list top 3).* I find this item is: O useful to me O generally useful, but not to me O irrelevant	

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Communica-tion expertise (continued)	***Presentations:*** *Keynote/invited talks (list top 3).* I find this item is: O useful to me O generally useful, but not to me O irrelevant	**Your comments:**
	Public engagement: *Media interviews and other (list top 3).* I find this item is: O useful to me O generally useful, but not to me O irrelevant	
Organisational expertise	***Management:*** *Top-3 management roles undertaken.* I find this item is: O useful to me O generally useful, but not to me O irrelevant	
	Advising: *Top-3 visits: topics, locations.* I find this item is: O useful to me O generally useful, but not to me O irrelevant	

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Organisational expertise (continued)	***Collaboration:*** *Top-3 projects and teams.* I find this item is: O useful to me O generally useful, but not to me O irrelevant	**Your comments:**
	Top-3 **administrative roles** *undertaken, including* **committee membership**, *chair or secretary roles.* I find this item is: O useful to me O generally useful, but not to me O irrelevant	**Your comments:**
Other expertise	*List expertise you find important, but could not fit above.* I find this item is: O useful to me O generally useful, but not to me O irrelevant	

Could you provide your feedback on the entire Expertise sub-portfolio?

I find this sub-portfolio useful as:

◯ **CV augmentation**
◯ **CV replacement**
◯ **analytical tool**

Sub-portfolio Output

Scholarly output	Top 3 books or chapters of books. I find this item is: O useful to me O generally useful, but not to me O irrelevant	Your comments:
	Top 3 journal articles. I find this item is: O useful to me O generally useful, but not to me O irrelevant	
	Top 3 full conference/workshop papers. I find this item is: O useful to me O generally useful, but not to me O irrelevant	

Scholarly output (continued)	*Top 3 theses, book reviews, editorials.* I find this item is: O useful to me O generally useful, but not to me O irrelevant	**Your comments:**
	Top 3 conference abstracts and posters. I find this item is: O useful to me O generally useful, but not to me O irrelevant	
	Top 3 invited talks at universities outside your own institution. *Mention title, date, your affiliation, location, occasion. Indicate local/national/international.* I find this item is: O useful to me O generally useful, but not to me O irrelevant	
Communica-tion to the general public	***Top 3 magazine or newspaper articles*** *published in press (written by you, not about you).* I find this item is: O useful to me O generally useful, but not to me O irrelevant	**Your comments:**

Communica-tion to the general public (continued)	*Top 3 encyclopedia articles.*	**Your comments:**
	I find this item is: O useful to me O generally useful, but not to me O irrelevant	
	Top 3 popular books/ articles (fiction/ non-fiction).	
	I find this item is: O useful to me O generally useful, but not to me O irrelevant	

Teaching	*Top 3 textbooks, online lectures, slides, teaching materials, syllabi.*	**Your comments:**
	I find this item is: O useful to me O generally useful, but not to me O irrelevant	
	Top 3 students supervised that were awarded/ granted a BSc/MA/PhD etc.	
	I find this item is: O useful to me O generally useful, but not to me O irrelevant	

| Web and social media academic communica-tion | **Top 3 social websites for academic purposes.** *Include goals of the sites and activity levels. Do not list individual posts here, but below.*

I find this item is:
O useful to me
O generally useful, but not to me
O irrelevant | Your comments: |
| | **Top 3 contributions to social websites.** *If you do not have full on-line accounts, but did occasionally post something, list it here. If you do have full accounts, list important individual items here you think of particular interest (e.g.: podcasts, videos, slideshare presentations, blogposts).*

I find this item is:
O useful to me
O generally useful, but not to me
O irrelevant | |

| Datasets, software, tools, instruments | **Top 3 description of software, tools and instruments developed.**

I find this item is:
O useful to me
O generally useful, but not to me
O irrelevant | Your comments: |

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Output with registered intellectual or industrial rights	**Top 3 patents, standards, guidelines,** *or other Registered discoveries, such as animal species, celestial bodies, DNA sequences, algorithms.* I find this item is: O useful to me O generally useful, but not to me O irrelevant	**Your comments:**
Funding and grants	**Top 3 granted projects.** I find this item is: O useful to me O generally useful, but not to me O irrelevant	**Your comments:**
Other output	*List other output you find important, but could not fit above.* I find this item is: O useful to me O generally useful, but not to me O irrelevant	**Your comments:**

Could you provide your feedback on the entire Expertise sub-portfolio?

I find this sub-portfolio useful as:

O CV augmentation
O CV replacement
O analytical tool

Sub-portfolio Influence

Influence on science	*Total number of citations*, *h-index*, *m-quotient* (h-index adjusted for academic age) and *number of citations per paper* - from Google Scholar (using Harzing's Publish or Perish) also Web of Science/Scopus (if available). To compensate for multi-authorship, adjust the number of publications and h-index for the average number of authors if necessary. We recommend guidelines for doing this and also for interpreting the results, as the benefits and disadvantages of fractionalization must be clear.	Your comments:

I find this item is:
- O   useful to me
- O   generally useful, but not to me
- O   irrelevant

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Influence on science (continued)	***Number of citations to the top 3 books in Google Books.*** *Provide citation counts and details of the books. For Google Books citations to a book, search for the book title and manually scan the results for genuine citations to the work. To compensate for multi-authorship, these indicators should be divided by the average number of authors of the publications.*	Your comments:
	I find this item is: O useful to me O generally useful, but not to me O irrelevant	

Influence on science (continued)	**Top 3 invited talks at universities and conferences outside the host institution (local, national and international).** I find this item is: O useful to me O generally useful, but not to me O irrelevant	**Your comments:**
	Top 3 prizes and awards (local, national and international). I find this item is: O useful to me O generally useful, but not to me O irrelevant	
	Top 3 editorship and editorial-board membership. *List those that in your estimate show/indicate best how influential you are.* I find this item is: O useful to me O generally useful, but not to me O irrelevant	
	Top 3 conference/program committee memberships. I find this item is: O useful to me O generally useful, but not to me O irrelevant	

Influence on science (continued)	***Number of followers, if substantial, in: Academia.edu, ResearchGate, Blogs, Twitter, etc.*** I find this item is: O useful to me O generally useful, but not to me	**Your comments:**
	Report up to 3 interesting **web mentions** *that are not already elsewhere in the portfolio.* I find this item is: O useful to me O generally useful, but not to me O irrelevant	
	List top-3 papers with highest number of readers on the reference manager **Mendeley ;** **provide readership counts and details of the publications.** I find this item is: O useful to me O generally useful, but not to me O irrelevant	

| **Influence on society** | ***Top 3 Web/Press coverage (local, national and international).***

I find this item is:
O   useful to me
O   generally useful, but not to me
O   irrelevant | **Your comments:** |

Influence on society (continued)	**Top 3 tweets or blog posts about publications.**	**Your comments:**
	I find this item is: O useful to me O generally useful, but not to me O irrelevant	
	Number of views/shares/likes/downloads of top-3 items authored by you on the Web (provide details of the items).	
	I find this item is: O useful to me O generally useful, but not to me O irrelevant	
	Top 3 of committee memberships (program/conference committee memberships are listed above).	
	I find this item is: O useful to me O generally useful, but not to me O irrelevant	
	Top 3 times asked for specialist evidence in other contexts (e.g., evidence to parliamentary committees, legal trials, as a member of a standards committee, or as an official advisor to a business or governmental organization).	
	I find this item is: O useful to me O generally useful, but not to me O irrelevant	

Influence on society (continued)	***Top 3 laws, regulations, guidelines and so forth that have been initiated, developed or amended, (partly) based on your research.*** *Briefly explain how and refer to projects, papers and other evidence of this influence.* I find this item is: O useful to me O generally useful, but not to me O irrelevant	**Your comments:**

Influence on economy	***3rd stream income generated.*** I find this item is: O useful to me O generally useful, but not to me O irrelevant ***Top 3 consultancy or advisory positions for companies.*** I find this item is: O useful to me O generally useful, but not to me O irrelevant ***Top 3 patents produced.*** *Provide citations to patents if available.* I find this item is: O useful to me O generally useful, but not to me O irrelevant	**Your comments:**

Influence on economy (continued)	**Top 3 spin off companies created.** I find this item is: O useful to me O generally useful, but not to me O irrelevant	**Your comments:**

Influence on education	**Top 3 teaching awards, including both within and outside the host institution.** I find this item is: O useful to me O generally useful, but not to me O irrelevant **Number of views of top 3 presentations, if substantial, on Slideshare, Youtube, Vimeo, online learning environments, etc.** I find this item is: O useful to me O generally useful, but not to me O irrelevant **Top 3 online syllabuses or course notes pages listing your works.** *Syllabuses can be identified via Google by searching for syllabus "[publication name]" or "reading list" "[publication name]" where [publication name] is a key publication.* I find this item is: O useful to me O generally useful, but not to me O irrelevant	**Your comments:**

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Influence on education (continued)	***Sales of top 3 student textbooks (provide details of the books).*** *Can also report Amazon sales ranks in comparison to similar books.* I find this item is: O useful to me O generally useful, but not to me O irrelevant	**Your comments:**
	Number of invited lectures to undergraduates at other universities. I find this item is: O useful to me O generally useful, but not to me O irrelevant	
	Downloads of top 3 datasets or applications created by you *(provide download counts or mentions/citations and details of the datasets/applications).* I find this item is: O useful to me O generally useful, but not to me O irrelevant	

Other influence	*List influence you find important, but could not fit above.* I find this item is: O useful to me O generally useful, but not to me O irrelevant	**Your comments:**

Please provide your overall impression of the portfolio below:

Thank you for your cooperation.
The ACUMEN Team