

Writing a Good Case Analysis

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1

Workshop goal

Hold a discussion to identify best practices for preparing a case analysis for appointments, merits, mid-career appraisals, and promotions.

2

About me

- I arrived to UC Merced in 2004 as an Assistant Professor and was quickly thrust into preparing case analyses.
- Since that time, I have participated in preparing cases in SSHA, NS, and ENG.
- I currently serve on Reserve CAP.

*I only claim to have done a lot of cases,
not to have done them well!*

3

Purpose of Case Analysis

According to APM-210-1e:

The report of the review committee forms the basis for further review by the Committee on Academic Personnel or its equivalent and for action by the Chancellor and by the President.

4

APM-210-1d: Criteria for Appointment, Promotion, and Appraisal

The review committee shall judge the candidate with respect to the proposed rank and duties, considering the record of the candidate's performance in:

- (1) teaching,*
- (2) research and other creative work,*
- (3) professional activity,*
- (4) University and public service.*

We also consider diversity, equity and inclusion.

5

APM-210-1d: Criteria for Appointment, Promotion, and Appraisal

...the review committee shall exercise reasonable flexibility, balancing when the case requires, heavier commitments and responsibilities in one area against lighter commitments and responsibilities in another.

Superior intellectual attainment, as evidenced both in teaching and in research or other creative achievement, is an indispensable qualification for appointment or promotion to tenure positions.

6

APM-210-1d: Criteria for Appointment, Promotion, and Appraisal

Contributions in all areas of faculty achievement that promote equal opportunity and diversity should be given due recognition in the academic personnel process, and they should be evaluated and credited in the same way as other faculty achievements.

7

Audiences

- Department (to whom the memo is addressed)
- Dean
- CAP
- Provost/EVC
- **Candidate** [redacted]

It is important to keep each and all of these groups in mind as you prepare a case.

8

Writing challenges

- Need to give a clear and concise analysis and evaluation of a candidate's scholarly achievements.
- Need to demonstrate a deep understanding of those achievements and their appropriate context.
- Need to provide depth and substance, but it cannot be too technical.
- Need to be respectful and professionally courteous.

9

Discussion Point 1

What do you do when you do not have extensive expertise in the candidate's research area(s)?

10

Discussion Point 2

How do you interpret “reasonable flexibility” when considering the balance between the following?

- (1) teaching,
- (2) research and other creative work,
- (3) professional activity,
- (4) University and public service,
- (5) Diversity, equity, and inclusion.

11

Discussion Point 3

How have/do you address inter-/multi-/trans-disciplinary research in a case analysis?

12

Discussion Point 4

How have/do you evaluate a candidate's contribution in a collaborative team?

13

Discussion Point 5

How have/do you give praise for a candidate's accomplishments without resorting to hyperbole?

14

Discussion Point 6

What methods can you suggest to others that help to maximize the effectiveness of a case analysis?