



UNIVERSITY OF
MARYLAND

THE OFFICE OF FACULTY AFFAIRS

Annual Reporting via Digital Measures: Faculty Feedback

Spring 2021

Executive Summary

The Digital Measures project team conducted a survey of the faculty involved in using Digital Measures to submit their 2020 annual activity report. The survey was conducted upon the close of the 2020 calendar year annual reporting cycle in April 2021. The goals of the survey were to explore the overall user experience with the Digital Measures system so as to engage in continual improvement of the system as the team looks to expand use of the system to other faculty processes. The Digital Measures project team also reviewed support request patterns and web-based resource usage during the annual reporting period.

Out of the 2714 faculty surveyed, 212 responses were received. Though small in number, the survey responses provide useful input and feedback to the team for further consideration as we continue the phased implementation of Digital Measures. Below are the key findings and recommendations from the survey.

Key Findings

Overall System Use

- Use of the system was a smoother experience this year in comparison to last year, even while nearly doubling the number of faculty involved in annual reporting through Digital Measures. Support requests were made by one in twelve faculty this year in comparison with one in four last year.
- A segment of the faculty respondents to the survey clearly indicated that they use the system minimally, purely to complete their annual reporting requirement.
- Survey respondents indicated that the bulk import service offered by Faculty Affairs is not yet seen as a useful service, as it is too hard to use.
- Respondents also indicated that the Publication Import tool in Digital Measures is not a satisfactory means of bulk importing publications.
- While a number of faculty indicated they would never use the system for CV generation, a significant number of faculty expressed interest in getting the system to generate not only the UMD Vita template but also CVs in other formats and styles, as well as biosketches.
- There continues to be some confusion about where faculty should be documenting their activities - which screen or option should be used

Workflow and Reporting

- Support request patterns indicate that faculty had trouble knowing if they had completed their report submission.
- A good portion of the faculty indicated that not all of their activities were included in the generated activity report.
- Nearly half of respondents indicated that the Workflow tool was not easy to use.

- The college-level decisions on professional track faculty involvement in annual reporting resulted in some faculty confusion, and was also difficult to manage.
- A few units appeared to be using the submitted annual activity reports and any associated personal statements as part of their committee-based merit review process.

Online Resources and Support

- The reconfiguration of the website provided a better experience. The home page with the updated news cards were frequently used by faculty. The redesign anchored the Digital Measures login button in the top navigation bar, supporting easier faculty login access over the previous portal design.
- In contrast, the Important News page was underutilized and may add little value.
- Of the fifteen help guides, only those related to the submission process itself were referenced by faculty and administrators.

Recommended Actions

The Digital Measures project team will work to address the key findings in the following ways:

- To help faculty better understand what goes where, the team will update the explanatory text for each activity screen in the platform to clearly indicate which section or sections of the Annual Activity Report are populated by that screen's data. Additionally, the annual activity report sections will be augmented with explanations identifying the activity screen in Digital Measures that populated it.
- Take advantage of the ability to add explanatory text to the Activities screen in Digital Measures to orient faculty to the annual reporting process and explain the purpose of the Extension screen sections.
- Renewed focus will be put on streamlined methods for faculty to bulk upload activity data to the most commonly used screens - Publications, Presentations and one or more of the Service screens.
 - Clear guidance on use of the citation parser [AnyStyle](#) as a means of generating a BibTeX file for publications will be provided on the Faculty Affairs website.
 - Faculty will be encouraged to send AnyStyle-generated BibTeX files for their presentations to the OFA Digital Measures team for bulk import.
 - The OFA team will explore means of harvesting University Service activity data for faculty, from University Senate involvement to (hopefully) involvement in standing committees in colleges and departments.
- Combine the first two steps in Workflow so that faculty have just one action to take in Workflow for their annual reporting.
- Identify a streamlined method for identifying professional track faculty involvement in annual reporting with unit-based faculty communications on reporting inclusion.

- Work with units on campus to identify who will be using the submitted annual activity report as part of their merit review committees and provide them with a workflow configuration that will support committee members' access to the submissions.
- Continue to offer training sessions (as needed) using Zoom. Clearly articulate what the training covers and provide attendees with links to related detailed training materials.
- Continue delivering reminder emails out of the Office of Faculty Affairs, rather than through Workflow, but migrate bulk emails to Maestro.
- Develop a training video or videos to replace the animated GIFs, with voiceover.

Greater detail regarding survey data, support ticket trends and platform use patterns are presented in the following sections.

Introduction

Out of the 2714 faculty surveyed, 212 responses were received. Though small in number, the survey responses provide useful input to the team for further consideration as we continue the phased implementation of Digital Measures.

The survey was a mix of ratings of statements about the experience and open-ended prompts. Prompts were for feedback on the training, support service and website resources. Additionally, respondents were asked to identify the feature they used the most, the least-used feature, and one improvement they would like to see. Lastly, they were asked what future uses they could see for the system.

Changes to Digital Measures Annual Reporting from 2020

As part of the phased rollout of Digital Measures, the population of faculty included in the annual activity reporting process using Digital Measures expanded from just tenured and tenure-track faculty for 2019 reporting to include the possibility of involving all paid faculty for 2020 reporting. The Libraries deferred their adoption of the platform for annual reporting and are looking to use Digital Measures for 2021 annual reviews. With professional track faculty, colleges individually determined who would be involved in annual reporting. Determinations were made based on a variety of factors, including professional track titles, and percentage FTE. This expansion of to all paid faculty nearly doubled the number of faculty involved in annual reporting using Digital Measures over the previous year.

Based on feedback from the 2019 annual activity reporting process, where Digital Measures (Activity Insight) was used for the first time, the following improvements were made over the course of 2020 in advance of the 2020 annual activity reporting cycle.

1. Website redesigned to improve access to the resources available. Announcements and news items are now prominently displayed on the main page.
2. Additional integrations implemented that auto-populate activity screens on a regular basis:
 - a. Patents and Invention Disclosures data integrated from the UM Ventures dataset
 - b. Teaching Innovation grant data from TLTC
 - c. Continuing Education through teaching innovation design sprints and workshops from TLTC, and faculty development workshops and programs from UMD ADVANCE
 - d. Mentorship - Guiding Professional Development data integrated from a Faculty Affairs dataset on faculty mentorship assignments
3. Activity screens were revised and improved. The confusingly designed "Professional and Campus Service and Committees" screen was separated into two screens, University Service and Professional Service, for more coherent categorization. Additionally, activity screens were added for Entrepreneurship, as well as for Media Appearances and Interviews, to better support faculty in documenting their contributions.
4. Several improvements were made to support faculty member's ability to contextualize their work.

- a. A Notes and Annotations field was added to the majority of the activity screens, including those auto-populated from other campus systems. This field gives faculty a means of identifying errors in the imported data, as well as providing context around a documented activity. UMD ADVANCE partnered with Faculty Affairs to provide guidance to faculty on the use of this field with annual reporting. Faculty were given [advice](#) on faculty work activities that may have been impacted by the pandemic, the [associated activity screens](#) in Digital Measures, and [examples](#) of how to strategically document COVID-19 impacts and ongoing invisible labor.
 - b. The majority of the activity screens now give faculty the ability to identify if the activity is related to Diversity and Inclusion and explain the relationship.
 - c. Faculty could optionally include a personal statement with their annual report submission.
5. Workflow steps were altered to provide more instruction and work around a versioning issue with submitted annual reports
 - a. The vendor recommended adding a second step to workflow to ensure that the version of the annual report submitted by faculty would be up to date with the activities they added (the first step includes the report version generated in January as the process opens, before most faculty have updated their activities for the year).
 - b. Additionally, to work around the versioning issue, the vendor implemented a Refresh All warning.
 6. Communications regarding the annual reporting process, including reminders, were generated by Faculty Affairs; the automated reminder notifications from the Digital Measures Workflow tool were not used.
 7. All training was delivered via Zoom.

Feedback Survey Findings

Overall Experience: Annual Reporting

Quantitative Feedback

Most survey respondents provided input on all of the rating questions in the survey.

Data Entry Options with Digital Measures

In contrast with last year's survey results, the majority of respondents had no opinion or were satisfied with activity editing and the pre-loaded data in the system. A minority of respondents were dissatisfied with the activity editing and updating capabilities in the Digital Measures platform. Similarly, a minority of respondents were dissatisfied with the pre-loaded data, integrated from other campus systems.

The Faculty Affairs bulk import data service did not receive much use. However, of the 71 respondents who did express an opinion on the service, over 60% were dissatisfied with the service.

Of the respondents, 110 expressed an opinion on the platform's publication Import feature. Of those respondents, 45% were dissatisfied with the functionality of the import tool.

Details from the survey are summarized below.

Responses	Adding activity using 'Add new item'	Importing publications with 'Import'	Using 'Bulk import data service'	The pre-loaded data in activity screens highlighted by 'Imported Data'	Adding my new activity data	Correcting my existing data
Very Satisfied	27%	9%	5%	22%	23%	17%
Satisfied	24%	7%	3%	20%	26%	19%
Neutral	23%	13%	5%	13%	21%	16%
Dissatisfied	12%	9%	7%	11%	15%	12%
Very Dissatisfied	12%	15%	14%	11%	11%	15%
Did not use	2%	42%	57%	17%	2%	17%
N/A	0%	6%	10%	5%	1%	4%
<i>Grand Total</i>	<i>210</i>	<i>211</i>	<i>210</i>	<i>205</i>	<i>209</i>	<i>209</i>

Report Generation and Report Submission using Workflow

Of the faculty who expressed an opinion on the report generation and Workflow-related questions, the majority indicated that they could easily find the report generation option, all of their activities were included in the report, and they were able to include a personal statement. More than half of the respondents indicated that they used the submission guide or the submission animation (gif) and also were able to refresh their report before submitting. More than 73% agreed that the email reminders were helpful and that they could confirm that their annual report submission was complete. Nearly three quarters of the respondents indicated that they did not need a lot of support to generate their annual report and/or submit it. While nearly half of the respondents agreed that report submission via workflow seemed easy to use, 43% disagreed that this seemed easy to use.

Details from the survey are summarized below.

Response	I used the guide/gif on how to submit the report	The report generation option was easy to find, and/or to use	The generated report included all my activities	I was able to include personal statement	I was able to refresh my report before submission	I was able to confirm that my submission has been completed
Agree	56%	52%	50%	46%	67%	73%
Disagree	5%	39%	39%	6%	7%	13%
Did not use	36%	8%	8%	41%	22%	10%
N/A	3%	1%	4%	7%	3%	4%
<i>Grand Total</i>	207	209	207	207	206	207

Response	The email reminders were helpful and included important resources	Report submission via workflow seemed easy to use	I needed a lot of support to generate and/or submit the report
Agree	73%	49%	22%
Disagree	15%	43%	64%
Did not use	9%	5%	7%
N/A	3%	3%	6%
<i>Grand Total</i>	208	207	205

Qualitative Feedback on Training, Support and Resources

Roughly half of the survey respondents provided feedback regarding the training sessions, support received and available resources. Positive feedback outnumbered negative comments, two to one. The top five most common comments are:

- The support guides were helpful
- The training was helpful
- I didn't use any of these resources
- The reminder emails were helpful
- The activity categories are confusing

Qualitative Feedback on Most Frequently Used Features of Digital Measures

Just under half of the survey respondents provided feedback identifying the parts or features of Digital Measures that they used the most. Roughly a third of the responses to this question were to simply state that the faculty member used the system minimally with the single goal of getting the activity report

submitted. A dozen faculty provided negative feedback; no clear trend was present in these negative responses.

The majority of the remaining responses were positive, identifying the following top platform features or activity screens as their most frequently used feature or part of Digital Measures. The top five most common parts or features mentioned are:

- Publications screen
- Adding an item
- Service screens
- Presentation screen
- Publication Import feature

Qualitative Feedback on Least Frequently Used Features of Digital Measures

Roughly a third of the survey respondents provided feedback identifying the parts or features of Digital Measures that they used the least.

In line with the previous survey question, 20% of the responses to this question were to simply state that the faculty member used the system minimally with the single goal of getting the activity report submitted. Nearly 10% weren't sure what other features there were to use. 15% of the responses identified features or parts of the system that they wished were available, or worked better. Nearly half of these requests were to have the ORA-Managed Sponsored Research data better reflect the faculty member's role in the sponsored research.

Among the responses that specifically named platform features that were least frequently used, the top items mentioned were:

- Publication Import feature
- CV generation
- Report generation
- Bulk import service

Qualitative Feedback on One Change to Recommend

More than half of the survey respondents provided feedback on the open text question asking for one change to recommend with Digital Measures and/or the reporting process.

Roughly a third of the responses to this question were directly related to the reporting process, and report changes. Nearly one-fourth of the responses identified system changes and features that they wish to be added so as to improve the user experience and/or to streamline the reporting process.

The top five common comments were:

- Make system more intuitive, less time consuming, and better formatted
- Alter the reporting process (e.g., consolidate reporting platforms/modify deadlines/make reporting optional etc.)
- I wish to have better looking, formatted report
- Publication Screen
- The activity categories are confusing

Qualitative Feedback on Future Uses of Digital Measures

Roughly a third of the survey respondents offered ideas on possible future uses of Digital Measures. Of those who provided feedback on this question, nearly two thirds of the responses did not indicate any interest in expanding use of Digital Measures to other uses in the future; mostly faculty said they didn't want to use it or they would only use it as requested for annual reporting. A few indicated that if the user interface was improved, they might use it more but not until then.

Among the remaining third of respondents who did identify future uses, the majority were interested in generating their CV, both the UMD Vita template as well as CVs in other styles and formats. Other uses identified were for generating biosketches, tracking activities, help with preparing a Teaching Portfolio, populating the UMD directory entry and unit level reporting.

Training, Support Requests and Website Usage

Training Experience

Due to the pandemic, all training sessions were offered remotely via Zoom. This resulted in higher attendance than in previous years when training was mostly offered in person, at various locations on campus to bring the training closer to faculty.

Analysis of Support Requests

In comparison with support requests for the 2019 annual activity reporting, faculty support needs were greatly reduced this year. Last year, one in four faculty members (25%) reached out for help using the support ticketing system. This year, just 8% of faculty members asked for help through the support ticketing system.

The areas where faculty needed help were similar to last year. Most frequently, faculty members needed help navigating the Workflow tool for submitting their annual report. Faculty most often needed help understanding if they had successfully submitted their annual report. A number of professional track faculty also had questions about their inclusion in the Workflow process

Faculty also had questions about data that was imported from other campus systems (16%), most often having questions about the Appointments at UMD data, and secondarily, about the Participation in

- Site access shows the peak in March just before the deadline for faculty submission.
- The revised layout has a home page with Important News cards. This page was a popular destination and the cards related to annual report submission were the most frequently accessed cards.
- Of the 15 guides to the use of Digital Measures available to faculty and administrators on the site, during the annual report submission cycle, the Annual Report Submission Guide was most frequently accessed. This guide was linked in the reminder emails.
- Notably, a guide that maps sections of the annual report to activity screens in Digital Measures was not utilized. Due either to this aid's name and/or location, faculty are not using the resource to help identify where to place their activities in the Digital Measures system to meet their annual reporting needs.

Conclusion

The Digital Measures project team conducted a survey of the faculty involved in using Digital Measures to submit their 2020 annual activity report. The survey was conducted upon the close of the 2020 calendar year annual reporting cycle in April 2021. The goals of the survey were to explore the overall user experience with the Digital Measures system so as to engage in continual improvement of the system as the team looks to expand use of the system to other faculty processes. The Digital Measures project team also reviewed support request patterns and web-based resource usage during the annual reporting period.

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Appendix: Feedback Survey

Questions included in the survey which was collected using Google Forms

1. How satisfied are you with the data entry options in Digital Measures? [Likert scale with choices Very Dissatisfied / Dissatisfied / Neutral / Satisfied / Very Satisfied / Did not use / N/A]
 - a. Adding activity using 'Add new item'
 - b. Importing publications with 'Import'
 - c. Using 'Bulk import data service'
 - d. The preloaded data in screens highlighted by 'Imported Data'
 - e. Adding my new activity data
 - f. Correcting my existing data
2. What are your impressions of the report generation and submission via workflow process? [Agree / Disagree / Did not use / N/A]
 - a. The report generation option was easy to find and/or use
 - b. I used the guide/gif on how to submit the report
 - c. The generated report included all my activities
 - d. I was able to refresh my report before submission
 - e. I was able to confirm that my submission has been completed
 - f. The email reminders were helpful and included important resources
 - g. Report submission via workflow seemed easy to use
 - h. I needed a lot of support to generate and/or submit the report
3. Please provide your feedback regarding the training sessions, support received, and available resources.
4. What parts and/or features of Digital Measures did you use the most? Why?
5. What parts and/or features of Digital Measures did you use the least? Why?
6. If you could change one thing about Digital Measures and/or the reporting process, what would it be?
7. In future iterations, I would like to be able to use Digital Measures for:
8. If you would be willing to talk to us about your feedback, please provide your email address: