



UNIVERSITY OF
MARYLAND

THE OFFICE OF FACULTY AFFAIRS

Annual Reporting via Faculty Success: Campus Feedback

Spring 2022

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Executive Summary

The Faculty Success project team conducted a survey of the faculty involved in using Faculty Success to submit their 2021 annual activity report. The survey was conducted upon the close of the 2021 calendar year annual reporting cycle in April 2022. The goal of the survey was to explore the overall user experience with the Faculty Success 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 Faculty Success project team also reviewed support request patterns and web-based resource usage during the annual reporting period. Out of the 2910 faculty surveyed, 174 responses were received.

In addition, a second survey was conducted of academic administrators involved in the review and approval of annual activity reports. The goal of this second survey was to explore the utility of the annual activity report Workflow submission as well as Faculty Success data more broadly in the unit's merit review process. This survey was added this year, the third year that Faculty Success has been used in annual reporting, since the Office of Faculty Affairs received a number of questions from individual units about how they could leverage the Faculty Success data in their merit review processes. Out of the 79 annual report approvers surveyed, 21 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 Faculty Success. Below are the key findings and recommendations from these surveys.

Key Findings

Overall System Use

- The system is clunky to use and time-consuming. Adding activity data involves too many clicks and navigation of too many separate fields.
- The configuration of activity screens is unnecessarily complicated. There are multiple activity screens for awards and for advising. While these may make sense from an implementation back-end point of view, for faculty, it is confusing to find the right place to document their activity. Additionally, since the system's activities cover all domains across the university, faculty find navigation overwhelming. They want to be able to focus on the select activity areas that pertain to their work.
- Faculty feel that the system is a waste of their time. They want to know how their unit and the university as a whole are using the data in the system, so that they can see how the time they are investing is beneficial.
- The Publication Import tool is not satisfactory: none of the import options are trouble-free and the process of selecting and reviewing the import entries is tedious.
- Self-service bulk import options are needed for other activity areas such as presentations and media appearances.
- Ideally, the system should provide CV parsing support, to eliminate faculty's need to enter their information, field by field, in the system.
- Faculty had difficulty annotating the data that was imported from campus systems.

Workflow and Reporting

- The Annual Activity Report is poorly structured; it is difficult to tell what motivates the ordering to the report sections. It is difficult for faculty to navigate, and slows down the work of merit review committees. Information on awards and related to advising is presented in a duplicative fashion; this makes it difficult to review the presented information.
- Faculty faced challenges getting ongoing work with draft publications included in their annual report. If the draft was initiated in a previous year and continued to be in development, it dropped out of the report, making it difficult for faculty to demonstrate their continued efforts.
- Many professional track faculty aren't sure if they should be involved in annual reporting and if they are, why they were included. There is a lack of communication around how these faculty are identified for the annual activity reporting process.
- Nearly half of the respondents reported that report submission with Workflow was not easy to use.
- Faculty shared that it was redundant to use Faculty Success for their annual report and then provide the same information in a totally separate format for their department's merit review process; they want Faculty Success used in the merit review process. Some weren't even sure that their report was even viewed or used by their unit.

Online Resources, Support and Reminders

- Faculty want unit-based training and guidance, where they can learn what their unit values and what they should be documenting - and where in Faculty Success.
- A number of faculty were not aware that training was made available.
- Many faculty liked the email reminders and found the content helpful. An addition to the email communications that they'd like to see is a confirmation email when they have successfully submitted their report in Workflow.

Supporting Merit Review Processes

- Faculty want their Annual Activity Report or data from Faculty Success used in their unit's merit review process.
- Unit heads found the annual activity report difficult to use for their merit review process but did find it was a faster way to access faculty data (than the traditional method of email queries).
- A sizable portion of the merit review survey respondents indicated a willingness to use Faculty Success to support their merit review processes in the future.

Recommended Actions

The Faculty Success project team will work to address the key findings in the following ways:

- Work with the Faculty Success Advisory Group to streamline the representation and presentation of both sponsored research and student advising in the system. The end goal should result in an activity screen configuration that is clear to the end user and provides the right level of detail in generated reports
- Reconfigure the Annual Activity Report to follow the University CV template organization. Refocus presentation of sponsored research and student advising to better match with campus priorities for these activities.
- Work with other units that faculty work with to prepare their promotion dossier to incorporate information and training on Faculty Success use (e.g., TLTC, ADVANCE)
- Understand campus reporting priorities in relation to ongoing draft publication efforts and adjust the reporting parameters to match campus needs.
- Work with colleges and their departments to use Faculty Success to support their annual and merit review processes and eliminate use of separate merit review documents
- Work with colleges to identify clear criteria for selecting professional track faculty in the annual reporting process, and communicate the criteria to the professional track faculty members
- Work with local units to support unit-based training on the use of Faculty Success for annual and merit reviews, clarifying what the unit values and how they expect to see faculty work documented
- Work with local units to support their annual and merit review processes by configuring reports that better support their reviewing needs

- Work with local units to encourage them to use Faculty Success Workflow, with the committee review feature, to conduct their annual and merit reviews
- Communicate to faculty how Faculty Success data is being used at all levels on campus
- Implement a marketing campaign to raise awareness around the Faculty Success system and its use for campus processes

In addition, the Office of Faculty Affairs (OFA) will provide Watermark with a summary of the key challenges faculty faced using the Faculty Success platform. OFA will continue to advocate on the campus's behalf for continued improvement in the Faculty Success platform to better meet the needs of the campus community.

Specifically, the following areas of concern will be brought forward:

- Clunky and time-consuming nature of activity entry
- Inability to customize the set of activity screens displayed
- CV parsing capabilities, from the entire CV in a specific format (such as the University CV template), or sections of the CV (e.g., publications, presentations and media appearances)
- Frustration with the poor quality of the Publication Import tool

OFA will also consult with Watermark to ensure that best practices are in place in relation to the configuration of the activities in the system.

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

Introduction

This year's annual activity reporting cycle for the 2021 calendar year was launched following a number of changes to the system and approach to the annual reporting process. Additionally, merit funding was available, which focused attention on the annual activity reporting process; tenured and tenure-track faculty must submit their annual activity report using Faculty Success to be considered for merit review.

Changes to Faculty Success Annual Reporting from 2021

As part of the phased rollout of Faculty Success, the population of faculty included in the annual activity reporting process using Faculty Success expanded to include all librarian faculty, in addition to all tenured and tenure-track faculty, and professional track faculty identified by their college. With professional track faculty, colleges individually determine who is involved in annual reporting. Determinations are made based on a variety of factors, including professional track titles, and percentage FTE.

Based on feedback from the 2020 annual activity reporting process, the following improvements were made over the course of 2021 in advance of the 2021 annual activity reporting cycle.

1. To help faculty better understand what goes where, the explanatory text for each activity screen in the platform was updated 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 were augmented with explanations identifying the activity screen in Faculty Success that populated it.
2. To simplify and streamline the Workflow submission process, the first two steps of Workflow were combined for faculty into a single step.
3. To help faculty more easily identify use the Faculty Success system, the following updates to the Faculty Success support website were made:
 - a. Added a ["Where does THIS Go?" guide](#)
 - b. Replaced the animated GIFs that demonstrated platform use basics and the submission process with [short narrated videos](#)
 - c. Expanded the bulk data import service with additional activity screen upload templates
4. To reduce confusion and eliminate last minute configuration changes, the process colleges used to identify professional track faculty involvement in annual reporting with unit-based faculty communications on reporting inclusion was revamped.
5. To support college processes, three school-specific Workflow templates were created for the iSchool to support their annual and merit review processes.
6. To ease the support team's email burden and gain access to delivery analytics, the submission reminder emails were migrated to the Maestro bulk email tool.
7. To give chairs and directors access to the annual report submissions for all of their faculty, an integration with the Office of Faculty Affairs' [APA System](#) was implemented providing annual report submission exports for all faculty jointly appointed in their unit.
8. To support departments and colleges with their merit review processes, a Merit Review Report was added, providing activity reporting across the three year merit review window.
9. To address concerns from faculty that not all of their ORA-managed sponsored research was included in the system, an Active Awards view of the ORA-Managed award data was added. This activity screen and section in the annual activity report lists all active awards in 2021 regardless of Quali Research transactions; this augments the existing ORA-Managed Awards information.
10. Efforts were made to streamline the import of sections of a CV. While several individual faculty members benefited from this effort by having all of their presentations or creative scholarship citations imported into Faculty Success, there is more work to be done to broaden this capability to more faculty members.
11. To ease the data entry burden for faculty members, University Senate involvement was bulk imported into Faculty Success.

Feedback Survey Findings

Two surveys were used to receive feedback on the annual reporting process this year. Continuing the approach used in the past two years, all faculty members who participated in the annual activity reporting process using Faculty Success were given the opportunity to provide feedback. Additionally, this year, all of the participating department chairs, research center directors and deans were given the

opportunity to complete a survey on their use and experience with Faculty Success to support their merit review process.

The general survey findings of the faculty members' experience is presented below first, followed by the merit review process survey findings.

Overall Experience: Annual Reporting

Out of the 2910 faculty surveyed, 174 responses were received. Survey respondents optionally provided their email address. The 36 respondents who provided their contact information were contacted for additional information on their responses, and nine shared additional details.

Quantitative Feedback

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

Data Entry Options with Faculty Success

As 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.

The Faculty Affairs bulk import data service did not receive much use. However, of the 66 respondents who did express an opinion on the service, over 60% were dissatisfied with the service. This is consistent with last year's survey results.

Of the survey respondents, 89 expressed an opinion on the platform's Publication Import feature. Of those respondents, 45% were dissatisfied with the functionality of the import tool. This is consistent with last year's survey results.

Details from the survey are summarized below. Note that the response ratings percentages exclude the tallies of Did Not Use and N/A; percentages listed in a column exceed 100%.

Responses	Importing publications with 'Import'	Using 'Bulk import data service'	The pre-loaded data in data screens highlighted by 'Imported Data'	Adding my new activity data	Correcting my existing data
Very Satisfied	17%	18%	24%	15%	16%
Satisfied	21%	9%	25%	27%	26%
Neutral	17%	12%	20%	25%	22%
Dissatisfied	10%	11%	11%	13%	12%

Very Dissatisfied	35%	50%	20%	20%	23%
Did not use	45%	54%	20%	2%	12%
N/A	3%	8%	5%	0%	4%
<i>Grand Total</i>	<i>172</i>	<i>172</i>	<i>170</i>	<i>172</i>	<i>171</i>

Report Generation and Report Submission using Workflow

On the subject of report generation and Workflow-related questions, the majority of the survey respondents indicated that they could easily find and use the report generation option. Responses related to whether the generated report included all of their activities were fairly evenly split: half indicated that the report included all of their activities but 42% disagreed with that statement. More than 80% of the respondents indicated that they were able to refresh their report before submitting. More than 70% agreed that the email reminders were helpful and that they could confirm that their annual report submission was complete. More than half 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. Overall, the feedback on these seven statements is nearly identical to the results for last year's survey.

Details from the survey are summarized below.

Response	The report generation option was easy to find, and/or to use	The generated report included all my activities	I was able to refresh my report before submission	I was able to confirm that my submission has been completed
Agree	57%	51%	81%	73%
Disagree	37%	42%	5%	17%
Did not use	6%	4%	9%	6%
N/A	1%	4%	5%	4%
<i>Grand Total</i>	<i>169</i>	<i>168</i>	<i>170</i>	<i>168</i>

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	70%	49%	19%
Disagree	18%	43%	61%
Did not use	5%	5%	12%

N/A	7%	3%	8%
<i>Grand Total</i>	<i>170</i>	<i>173</i>	<i>171</i>

Qualitative Feedback on Training, Support and Resources

Just over 40% of the survey respondents provided feedback regarding the training sessions, support received and available resources. The feedback was more positive than negative. The top five most common comments are:

- The training was good
- The reminder emails were helpful
- I didn't use the training or support
- I didn't know anything about training being offered
- It is difficult to determine where to document my activities

Qualitative Feedback on the Experience

Nearly half of the survey respondents provided feedback on the open text question asking for additional information related to any of the quantitative responses in the survey. These free-text responses can be found in [Appendix C](#).

A handful of the free-text responses were positive, indicating that the campus integrations were appreciated, that it is helpful to have the system open year-round and that it is a great improvement over the old FAR system.

Among the negative responses, the most common comments were:

- The system is clunky and time-consuming, involving too many clicks, with too many data fields
- The system is too complicated with too many activity screens
- The annual report is poorly structured and has other deficiencies
- It is unclear why faculty should be taking time to use the system; they don't know how the campus is using the information - or if it is at all

Several faculty reported that as a consequence of the first two issues in combination with the last issue, they gave up and only partially documented their activities.

Qualitative Feedback on Future Uses of Faculty Success

Over a third of the survey respondents offered ideas on possible future uses of Faculty Success.

Of those who provided feedback on this question, nearly one third indicated that they have no interest in expanding their use of Faculty Success, or that they'd prefer to never use it again.

Among the two thirds of respondents who did identify future uses, the most commonly identified use was for merit reviews. Faculty shared that it was redundant to use Faculty Success for their annual report and then provide the same information in a totally separate format for their department's merit review process. Other uses identified were for generating a CV - both in the University CV format, and a personal CV, and generating biosketches. Faculty also indicated that they would like the system to be able to parse their CV or sections of their CV in the future, to ease the data entry burden.

Improvements Recommended for Faculty Success

Within the free-text responses, faculty offered a number of recommendations for improvements to the system and its use at the University. It is not surprising that there were multiple requests for CV import capabilities, since faculty reported that data entry is time-consuming and clunky. Faculty are interested in being able to get their entire University CV-formatted vita parsed by the system, or even parts of their CV (e.g., presentations, or media appearances).

Additionally, they'd like to understand how their unit and the university are using the Faculty Success data so that they understand that the time they are investing is beneficial. They'd like to get training in their local department on annual reporting so that they can understand what the department values and how/where to document their activities.

Merit Review Experience with Faculty Success

With the availability of merit this year, questions from units across campus about ways to use Faculty Success to support their merit review processes. OFA had Watermark configure a Merit Review Report template in Faculty Success to support these needs. To learn more about how units leveraged Faculty Success with their merit review processes this year, a second survey was conducted of academic administrators involved in the review and approval of annual activity reports. The goal of this second survey was to explore the utility of the annual activity report Workflow submission as well as Faculty Success data more broadly in the unit's merit review process. Out of the 79 annual report approvers surveyed, 21 responses were received.

Out of the respondents, 60% reported using the 2021 Faculty Success submission for their annual and/or merit review processes. Roughly 30% did not and 10% used it in some cases.

Respondents were asked to identify what they used instead of (or in addition to) the annual report in their review processes. Responses can be summarized as follows:

- The unit's Merit Committee had its own required materials that faculty submitted at the request of the committee (7 responses)
- Faculty CV (4 responses)
- Found faculty had neglected to include their accomplishments in their annual report sufficiently
- For PTK who didn't participate in annual reporting, they were asked to submit a CV

- Only used other materials because their faculty didn't have three years of data yet in the system

The survey also asked about the use of three years of Faculty Success data for the merit review process with tenured and tenure-track faculty. Fewer respondents indicated that they used three years of Faculty Success data for the merit review process with their tenured and tenure-track faculty, than indicated use of the submitted annual report materials.

The majority of respondents who did use three years of data from Faculty Success generated the reports themselves for their faculty to support the review process, as well as exporting data into their own report structure or format for analysis.

When asked if they would be willing to use Faculty Success Workflow to support the committee review process in their merit reviews, nine of the ten said either yes or maybe.

Survey respondents shared the challenges they faced using Faculty Success for their merit review process:

- The annual report is hard to use for this purpose. The content in the annual report is not relevant and the format/arrangement is not easy to use in a merit review situation (3 responses)
- There were inconsistencies in level of detail across the faculties' reports (4 responses)
- The unit needed a way to include a COVID impact statement
- The merit committee wants PDFs of the submitted documents. These are available from Workflow but there were steps involved in getting them downloaded and named correctly before uploading the PDFs to Box
- Some faculty didn't know how to submit their report
- The Faculty Success system lacks data for a complete merit review; a CV is still needed

Although one respondent does not believe there is any benefit, the following benefits of using Faculty Success as part of the merit review process were identified:

- It is easier/quicker to access faculty data (but not always as useful as hoped) (5 responses)
- There is consistency in reporting, and standardization which supports equitable processes (4 responses)
- Encourages people to report - ensures a far higher compliance rate
- Ensures that some information is included consistently that faculty wouldn't normally put in their CV - proposals that weren't funded, course evaluations
- Compliments the narrative input we request of our faculty
- The review process for our unit was designed around the Faculty Success format
- Auto-population of data from campus systems a plus

The following suggestions were provided through the survey on ways to improve Faculty Success to better support the merit review process:

- Reframe the personal statement to be more targeted; needed a way to capture COVID impact statements. Also reframe faculty's understanding of the purpose of the personal statement so that they understand it will be used as the merit narrative

- Require all PTK faculty to complete the annual activity report
- Alter the submissions download to follow better naming conventions for the files in the zip
- Improve the formatting to be cleaner, more customizable. Clarify what fields appear in the report output and in what order
- Improve the administrator's instructions for generating reports for all of their faculty
- Mandate use of the system, with consequences
- Align reporting with my college's metrics for PTK rating and promotion
- Improve data entry in the Faculty Success system
- None - let each unit do their own process

Training, Support Requests and Website Usage

Training Experience

After the success with remote Zoom-mediated training for the 2020 annual reporting cycle, all training sessions were again offered remotely via Zoom this year. Attendance did not match last year's level but was still higher than in prior years when it was offered in person. It is likely the higher attendance levels seen last year can be attributed to that year's addition of professional track faculty into the reporting pool.

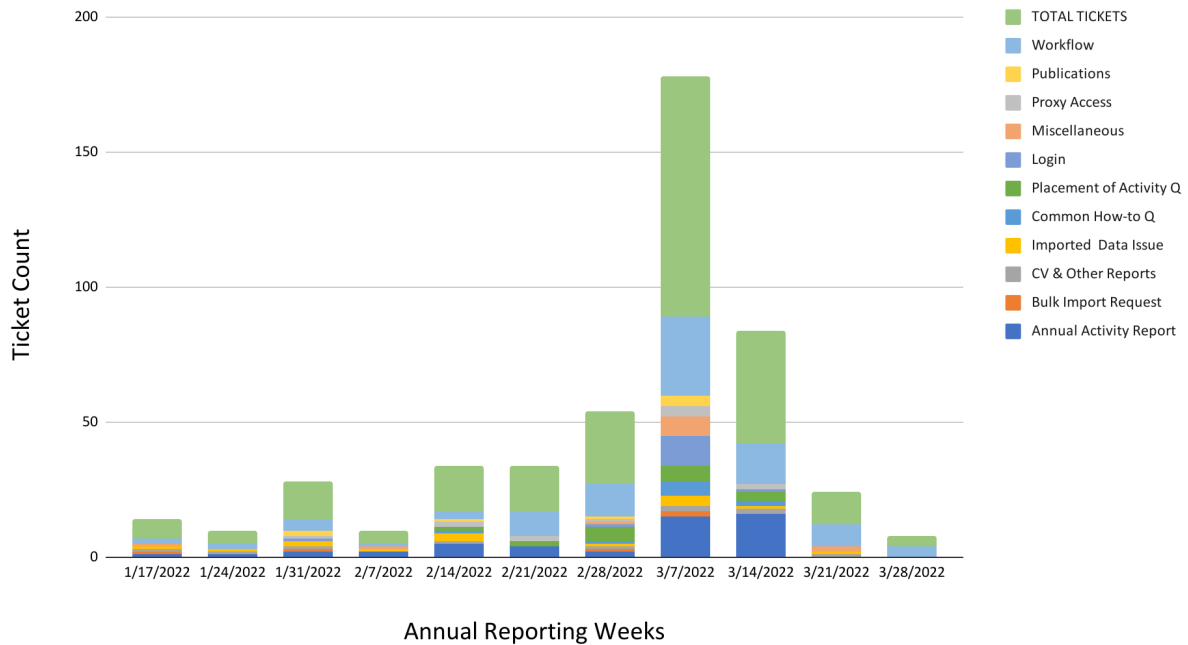
Analysis of Support Requests

In comparison with support requests for the 2020 annual activity reporting, faculty support needs were somewhat higher this year. As with last year, 8% of the participating 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 whether they were part of the annual reporting process, or why they were included.

Faculty also had questions about their annual activity report. Most of the questions were about how to correct the problem they saw as activities not showing up in the generated report.

Ticket Categories by Week



Resource Use on Faculty Affairs Faculty Success Portal

Faculty Affairs monitors the Faculty Success portal (<https://faculty.umd.edu/activity>) with Google Analytics and Tag Manager to better understand usage patterns across the web-based resource. The top resources accessed from the portal were the link to login to Faculty Success and the Important News card with details on 2021 annual activity reporting.

Conclusion

The Faculty Success project team conducted a survey of the faculty involved in using Faculty Success to submit their 2021 annual activity report. The survey was conducted upon the close of the 2021 calendar year annual reporting cycle in April 2022. The goal of the survey was to explore the overall user experience with the Faculty Success 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 Faculty Success project team also reviewed support request patterns and web-based resource usage during the annual reporting period. Out of the 2910 faculty surveyed, 174 responses were received.

In addition, a second survey was conducted of academic administrators involved in the review and approval of annual activity reports. The goal of this second survey was to explore the utility of the annual

activity report Workflow submission as well as Faculty Success data more broadly in the unit's merit review process. Out of the 79 annual report approvers surveyed, 21 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 Faculty Success. The key findings and recommendations are presented in the Executive Summary above.

Appendix A: Annual Reporting with Faculty Success Feedback Survey

Questions included in the survey which was collected using Google Forms

1. How satisfied are you with the data entry options in Faculty Success? [Likert scale with choices Very Dissatisfied / Dissatisfied / Neutral / Satisfied / Very Satisfied / Did not use / N/A]
 - a. Importing publications with 'Import'
 - b. Using 'Bulk import data service'
 - c. The preloaded data in screens highlighted by 'Imported Data'
 - d. Adding my new activity data
 - e. 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. The generated report included all my activities
 - c. I was able to refresh my report before submission
 - d. I was able to confirm that my submission has been completed
 - e. The email reminders were helpful and included important resources
 - f. Report submission via workflow seemed easy to use
 - g. 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. Use the space below to provide details on any of the above questions, if desired.
5. In future iterations, I would like to be able to use Faculty Success for:
6. If you would be willing to talk to us about your feedback, please provide your email address:

Appendix B: Merit Review with Faculty Success Feedback Survey

Questions included in the survey which was collected using Google Forms

1. In your annual review and/or merit review process, did you use the submitted 2021 Annual Activity Report and any submitted personal statements from Faculty Success Workflow? [Yes/No/Other]
2. If you did not use the submitted 2021 Annual Activity Report in your unit's review process, can you explain why not and what you used instead?

3. Did you draw on the three years of Faculty Success data for your tenured and tenure-track faculty in your merit review process? [Yes/No/Other]

The following questions relate to your use of the three years of Faculty Success data for your merit review process

4. Did you have faculty share/send reports of that data with you? [Yes/No/Other]
5. Did you generate the reports yourself for your faculty for use in your review process? [Yes/No/Other]
6. Did you export data yourself to analyze in your own report structure or format? [Yes/No/Other]
7. The Workflow module can support committee reviews of submitted materials. Would you be interested in shifting your review process to Workflow in Faculty Success so that all committee members can access and provide feedback on the submitted materials? [Yes/No/Maybe]

Overall Experience

8. What challenges did you encounter using Faculty Success to support your merit review process?
9. What benefits did you see in using Faculty Success to support your merit review process?
10. What changes would you recommend be adopted to make the merit review process better supported by Faculty Success?
11. If you would be willing to talk to us about your feedback, please provide your email address:

Appendix C: Free-text Responses - Annual Reporting Survey

Feedback on training sessions, support received and available resources

Positive feedback:

- Reminder emails helpful, both in terms of the information/resources provided and the reminder aspect [**five** of this comment received]
- Stumbled onto a resource 'Where does THIS go?' once but then had trouble finding it again - it was useful but only scratched the surface [received **twice**]
- Website resources are good [received **twice**]
- Our department-level training was excellent - gave good guidance on what is expected
- BibTeX import worked well
- Generally good experience

Feedback on any of the questions asked

Positive

- Good that it brings in course and grant info automatically
- Best system i've used in 12 yrs at UMD; easy to enter information
- Improves on the old FAR system and far better than the previous systems meant to replace FAR
- Being able to add a personal statement and explain my involvement and the past year was extremely important
- Glad the system is open year-round - add a link in ARES to keep updates regular

Negative

Waste of Time - What's in it for me? (12)

- The dean approved the wrong report version for me - is anyone even looking at this?
- How is this be used? - we need to weigh the other uses against the cost of faculty's time in entering the information
- No justification has been given for the use of this system
- Why am I doing this? It is time-consuming for those of us on soft funds

Platform Deficiencies

Import Publications doesn't work well (7)

- Paper number dropped on import
- DOI dropped on import
- Hard to locate duplicates

NSF Biosketch is hard to use

Clunky system to use (24)

- Field by field data entry is time consuming (2)
- Too many fields on the Publications screen (3)
- Presentations entry is very time consuming (4)
- Adding collaborators is time consuming (2)
- If I enter an activity on the wrong screen, there isn't a way to move it to the right screen (2)
- The summary screen layout made it hard to tell how an item was categorized

Workflow (3)

- I couldn't tell if I had successfully submitted my annual report (2)
- The recall process for a submission was "interesting"

Configuration of System

System is too complicated (22)

- Too many screens (3)
- Field labels and screens are unclear (2)
- Configuration to support the entire campus is onerous for faculty in individual departments - too much extraneous information
- Too many clicks to get to the right screen (2)
- The description of the field labels is too jargony
- So complicated that I gave up and only partially entered my activities (4)
- The advising screens are not intuitive; it is odd that the committee involvement is separated out and that it only gets information when the student graduates
- Advising screens don't allow me to document the mentoring I do for professional development or co-advising
- The set of screens doesn't represent me very well; I have a lot of international involvement but found it surprising that many of my activities ended up in just one item
- Shouldn't need any training

Unclear where I document my work (6)

- How do I document attending a conference, not just presenting at one?
- I had difficulty finding ways to document my contributions in my PTK role (4)

Imported data

- I couldn't find a way to annotate the imported data (e.g., teaching, course evals, grants) if there were errors or if I wanted to recognize co-instructors (3)
- Some of my teaching data was missing - I didn't see how I could document that
- Some of my grants were missing (2)
- Half of my advising committee data was missing

Data fields provided are too limiting

Data loaded from Lyterati without any dates on the records, which messes up reporting

Grant data doesn't go back far enough, historically

Difficult to see a clear path to the final report

The results of the bulk import had accuracy issues

Extension not well integrated into the annual reporting (4)

- Configuration is oriented toward on-campus researchers, not me
- Extension makes me submit a CV annually, why should I even do this?
- I have to manually copy the major program areas from my CV to get them into the annual report
- I don't know where presentations to stakeholders go

Workflow Configuration

- There was too much explanatory text on the Workflow submission screen; I couldn't see the report I was to review

General Concerns

Concerned will have to reenter all of this information again if the campus moves to a new system
Too many email reminders and the content was unhelpful

Annual Report Deficiencies (22)

- Fields in the report are not consistent; no way to predict what the report will look like with the data that's been entered until the report is previewed (2)
- The font sizes were inconsistent
- Representation of contracts and gifts is redundantly reported; the titles of these sections are confusing
- The order of sections in the report is not intuitive and is hard to use for review (6)
- Entries made by others that include me (e.g., presentation co-presenter) show up on my report when I didn't want them too
- Not all of my activity data was included in my report (2)
- The description field on service entries did not get included in the report
- It is unclear what entries belong to what year (2)
 - I created a working paper in 2020 and am still working on; how do I document that ongoing involvement with the paper in the report? It didn't get included.
- The CV generated is hard to read and it omits important details (3)
 - The CV generated by this system should never serve as my formal CV
- Sponsored Research is confusing in the report (2)
 - Grant information was duplicated, with different amounts - are these to be summed up?
- The advising sections were duplicative

I would like to use Faculty Success for _____ in the future:

- Merit Review - redundant to format the same information in a separate document [reported **eleven** times]
 - Report course evaluations for three years for merit reviews
- University CV generation [reported **six** times but once recommending that the system be replaced with one that is easier to use and can generate a University CV]
- Human-readable CV [reported **four** times] - well-organized and well formatted
 - Lifetime of activity
 - Mass data collection tool doesn't translate to supporting a vitae that supports my annual review
- Biosketches - NSF, NIH, USDA [NSF **three** times]

- Summarize Extension data in the annual report to save Extension faculty time [reported **twice**]
 - Need to summarize numbers reached, significant workshops /events taught from the Extension data
- Import from NCBI SciEnvCv and NCBI MyBibliography [reported **twice**]
- Recording work not formally recognized or compensated by the department [reported **twice**]
 - Publication draft efforts
 - Experimental work that is not documented
- Improve display of publication data in reports; not suitable for external audiences - move to a means of letting faculty share scholarly accomplishments externally and you'll get buy-in
- Better integration with college and university committees
- Integrate with Google Calendar so when I schedule a talk, keynote, or press interview I could trigger an import into Faculty Success; at report time, I could choose the category where that calendar entry belongs
- Be sure that if this system is replaced, that the data in the system is migrated to the new follow-on system
- Automatically parsing of uploaded material, including my university-formatted CV
- Preserve source formatting (bold, bullets, spacing, etc.) when copy and paste formatted information
- Linking to talks and presentations
- Keeping track of presentations and publications
- Import Altmetrics of my work including media engagement/interviews
- Bulk data import
- Faculty workload dashboard
- Batch runs for all faculty in a unit of merit review report summarizing teaching evaluation data for the past three years (instead of having faculty provide it)
- Need a way to correct items entered by other people on my behalf (as co-presenter)
- Need an easy way to switch entries from one screen to another
- Need a way to document co-presenters with Extension and Outreach Presentations (?)
- Document my teaching and mentoring that is non-traditional
- Document my theatrical design and compositional work
- Reduce repetitive entry of data
- Better clarity on why some PTK faculty participate and others do not
- PTK Merit report for PTK Merit Review Committee (instead of full CV)

And:

- Never want to use again or as little as possible [reported **eighteen** times]
- Only for annual reporting [reported **four** times]
- Not for biosketches, or tenure and promotion
- Don't want it to replace the CV I personally maintain

Recommendations/Improvements Suggested in the Survey Responses

- Add hover-text descriptions to explain fields
- Order sessions of the annual report to match the University CV template [reported **two** times]
- Provide a way to move an activity between two different screens
- Augment the University CV template with the same sort of screen descriptions that appear in Faculty Success
- Improve Workflow
 - Streamline the instruction text in the Workflow step so it is easy to see the report being submitted
 - Send a confirmation email after the successful submission of the annual report
 - Give me a way to save the report that I just submitted for my records
- Move Notes & Annotations higher on the imported data screens and provide instructions on ways to annotate the imported data
- Units should provide their own training on how to document activities for the annual report and merit review [reported **two** times]
- Hide or mark as complete the sections of the Activities screen that are complete or not applicable
- Make a video of the submission process (already available)
- Add a section/screen on Program Administration/Leadership outside of service (e.g., program director of a PhD program as part of the clinical faculty track title series)
- When another user links to me with their activity entry, let me indicate if I want that entry in my report
- Improved data entry options
 - Import my activities from my CV in the University CV template format [reported **three** times]
 - Provide an "Import" function as is available with Publications for Presentations [reported **four** times]
 - Let me bulk import activities from a spreadsheet, using a template (already available)
 - Provide an "Import" function as is available with Publications for Media Appearances
 - Let me enter paper citations in one text box, not field by field
- Share a one-page informational sheet with faculty on how the data in Faculty Success is being used to justify their time commitment in entering their data
- Publication "Import" should auto-update from Google Scholar and the other citation services, as new publications appear
- Help me update my activities all year long by adding a link in ARES
- Get my college-level and campus-level committee involvement imported for me
- Summarize my extension data in terms of the number of presentations I did and the number of attendees in the annual report
- Include Extension Direct Events in the annual report
- Import Media Appearances through an integration with AltMetrics