



UNIVERSITY OF
MARYLAND

THE OFFICE OF FACULTY AFFAIRS

**Annual Reporting via
Activity Insight:
Faculty Feedback**

Spring 2020

Executive Summary

The Faculty Activities Reporting team conducted a survey of tenured and tenure track faculty (the initial system rollout population) upon the close of the 2019 calendar year annual reporting cycle in April 2020. The goals of the survey were to explore the overall user experience with the newly implemented Activity Insight/Digital Measures system so as to engage in continual improvement of the system as the team expands its use to all faculty for 2020 calendar year reporting. In particular, the survey explored the ease of using the system, system features, and the challenges/benefits that users identified from their interaction with the system.

Out of the 1,500 tenured/tenure track faculty surveyed, we received 197 responses. Though small in number, the survey responses provide useful input to the team for further consideration as we continue the phased implementation of Activity Insight/Digital Measures. Below are the key findings and recommendations.

Key Findings and Recommended Actions

Key findings:

- Faculty overwhelmingly report that the reporting process is tedious. It involves a lot of clicks to get to the right data screen and to enter the information.
- Faculty were not able to always easily identify where to report their activities. This added to their frustration as they spent time searching for the right place to report an activity, and potentially determining that it was entered on the wrong screen (with no way to automatically shift that data to the right screen).
- Faculty do not believe the system can replace their need to maintain their own CV, which adds duplicative information management to their plates.
- Faculty for the most part do not see the current system as one that would support their reuse of the data. In their view, it is for campus reporting requirements and does not provide any benefit to them personally.
- For the most part, the integrated data was seen as a positive in the implementation. However, faculty were frustrated by the requirement that errors were their responsibility to fix.
- The sponsored research data from Quali Research had added frustrations for faculty, from the infrequency of the data update, to the presentation of the award data at a subaward account level, to inclusion of a limited set of research participants with each award.
- Faculty do not believe that the means of collecting the annual reporting information is well aligned with the report output, or with ways that activity data was reported in the past.

Recommendations:

- The Activity Insight project team should work with its advisory group to understand the anticipated use of the system for reporting by professional track and librarian faculty, and align the configuration with its planned use.
- The training, on-screen informational text and user guides should be aligned with a clear message on the intended use and intent
- The project team should work with campus stakeholders and the vendor to assess squarely the ability of the system to generate the UMD CV template for campus promotion and tenure review processes. If it is possible, the team should work to fully support generation of the UMD CV template; if not, the scope of use of the platform should be clearly communicated and data screens should reflect the scope of the system's use.
- The Activity Insight advisory group should reassess the purpose and scope of the integrated Kualu Research data to ensure that what is included in the platform fits the data reporting needs for the campus.
- The Activity Insight project team needs to develop “data reuse cases” that demonstrate the value of faculty time investment - such as webpages, CV export into multiple formats, and other forms of data extracts.

Greater detail regarding survey data are presented in the following sections.

Introduction

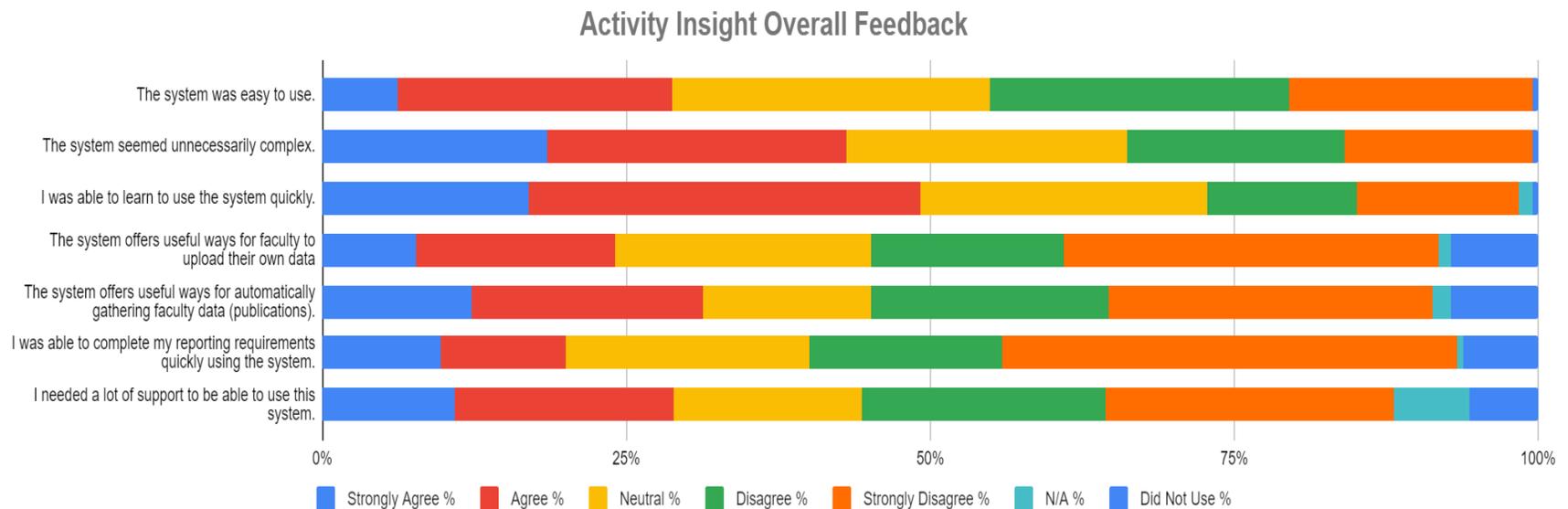
197 respondents out of the 1500 population of all tenured and tenure-track faculty.

Survey was a mix of ratings of statements about the experience and open-ended prompts. Prompts were for general feedback and the campus integrations. Additionally, respondents were asked to identify the three most negative aspects of the system, the three most positive aspects, and three improvements that they would recommend. Lastly, they were asked what other uses they could see for the system in the future.

Overall Experience: Annual Reporting

Quantitative Feedback

All faculty provided input on all of the rating questions in the survey.



Across all respondents, the majority disagree that they needed a lot of help using the system. They mostly agree that they are able to learn the system quickly.

Overall, faculty disagree that they were able to complete their report quickly as well as that the system offers useful ways to reuse the data. The majority disagree that the system offers useful ways of uploading their own data.

Qualitative Feedback on Overall Experience and Integrated Systems

32% of the 197 respondents provided input on the first question asking for comments and concerns about the Activity Insight faculty data system used for 2019 annual activity reporting by tenured and tenure-track faculty. This feedback falls into a few broad categories, as presented below. The majority of the feedback is negative in sentiment.

User Experience with the System for Annual Reporting

The most frequently received comment was that the system was tedious to use. It involved many clicks to get information entered, with so many separate fields to fill in, especially co-author and co-presenters names. There are too many screens and the navigation between them is tedious. This comment was made by 20% of the survey respondents.

Many expressed concern with fully understanding what activities were meant to go on what data screen. They asked to have better examples of what goes on each of the screens. A number of faculty complained that activities in the arts and humanities are not represented as fully as they should be, and called out representation for the performance events in particular. The Service screens were called out as being especially confusing. Faculty also commented that Extension activities are not well reported in the annual activity report.

A number of faculty said that the handling of student mentoring and student advising is confusing in the system and the report.

Some reported that the set of screens and options does not match with the current UMD CV template, while others commented that the correspondence between the UMD CV template and the screens' layout was helpful in getting oriented to the system.

Journal reviewing activities were a frustration. In the past, faculty were asked for the number of journal articles they had reviewed in the year. The format in Activity Insight didn't continue that practice which was confusing.

Feedback on the Digital Measures System

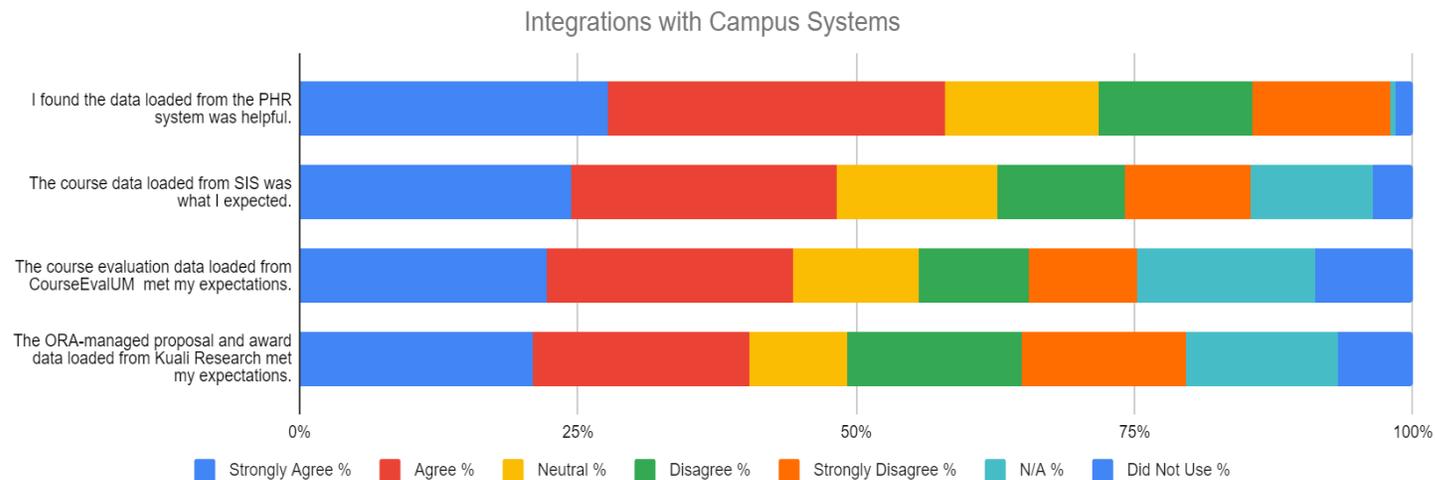
Several faculty complained that they couldn't delete records. Some specifically noted that the delete checkbox is so subtle in the interface that it was difficult to use. It is apparent from the first complaints that a number of faculty weren't aware that deletion was an option.

Several faculty complained that the system doesn't have an auto-save feature.

Related to the confusion reported about what data should be entered on what screen, faculty expressed frustration that there isn't a way to migrate data from one screen to another after an error is made.

More generally, a number complained that there should be an ability to copy and paste blocks of content from a CV.

Integrated Data from Campus Systems



Agree that the PHR information was helpful. Mostly agreed that the SIS data was what was expected. Mixed results on how the ORA-managed data met expectations.

Qualitative Feedback

As with the overall feedback open-ended question, 34% of the survey participants gave additional open-ended feedback on the integrated systems. And, as before, the feedback provided was mostly negative.

Overall, faculty expressed frustration with the inability to update or comment on data when it is incorrect from a source campus system. When the data is incorrect, having faculty go to the source system to get it corrected is time-consuming. Some commented that the integrated data is unnecessarily complicated.

With the PHR data, there were comments related to the incorrectness of the Appointments at UMD data - more appointments were listed than faculty thought should be present.

Faculty shared that the SIS data had the wrong course listed, courses missing from their scheduled teaching list, or the enrollments were reported incorrectly.

The ORA-managed data had the most feedback. Faculty said that the wrong data was reported, duplicate grants were listed, the yearly update of this data is insufficient, and overall this data was confusing. Specifics offered by faculty on this data indicated that while these details on the grant sub-accounts may be needed for annual reporting, it is not the right view of sponsored research for faculty review activities. There is a need for a Kuali Research presentation of the sponsored research as well as a faculty-provided viewpoint. In relation to the feedback on duplication of the grant information, it was shared that this is useful in an annual report but not in a CV

A number of faculty shared that the lack of current and correct data from the Graduate School on Participation in Thesis/Dissertation Committees was an issue. They also shared that the snapshot of involvement with students who have graduated was not sufficient; they want to have the data provided from the time that they start on the committee.

Lyterati Data

Faculty shared that the data imported from Lyterati was for the most part imported incorrectly. Faculty reported that the set of publications imported from Lyterati was disorienting. A number of records were missing end dates which then erroneously were included in the 2019 annual report.

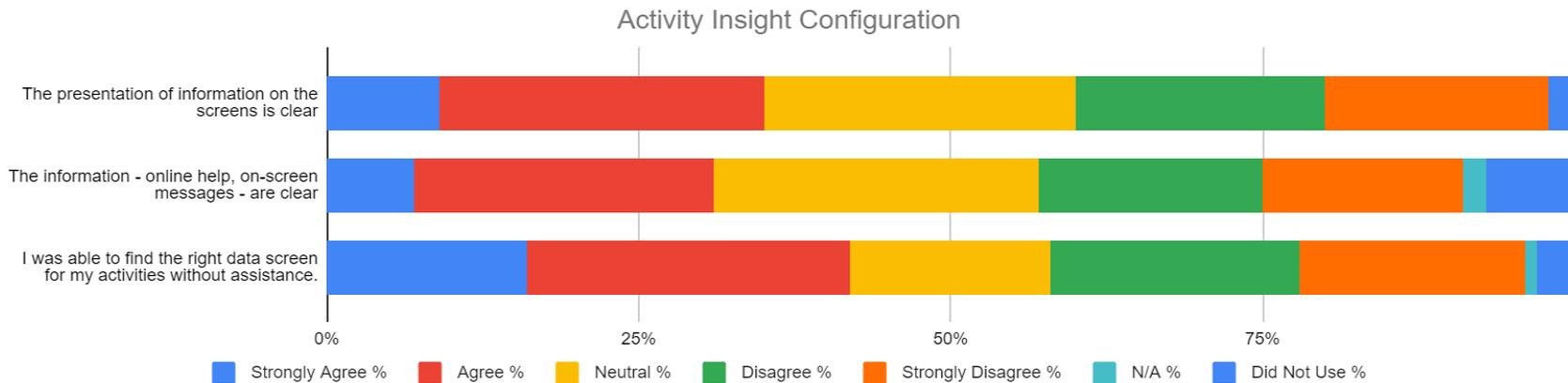
Annual Activity Report Format

A number of faculty complained that one single unified report for the entire campus is not a good approach - one size does not fit all. Additional comments related to the report format which was reported to be a mix of fonts and used poor citation style. Preferences for specific citation formats were identified. Additionally, the order of authors was reported as not according to standard - authors should be presented in alphabetical order according to the feedback, but that was not the practice in the report format. In relation to presentations, faculty reported that it is best practice to group papers presented at the same conference event within the citation list but this wasn't part of the annual report template format.

Other feedback complained about data not being included in the report, and data being included in sections with misleading headings that didn't match the options within the system. The latter feedback was presented in relation to how publications were included, as well as with the advising and mentoring data.

Some faculty and administrators were frustrated that the dates for activities were not included in the generated output for the annual report. They said it made it difficult for reviewers to determine the level of involvement across the calendar year.

Digital Measures Platform and Configuration



Feedback across the survey respondents was mixed on the clarity of the information presented as well as the online help, and their ability to determine where to report their activities without assistance.

Qualitative Feedback

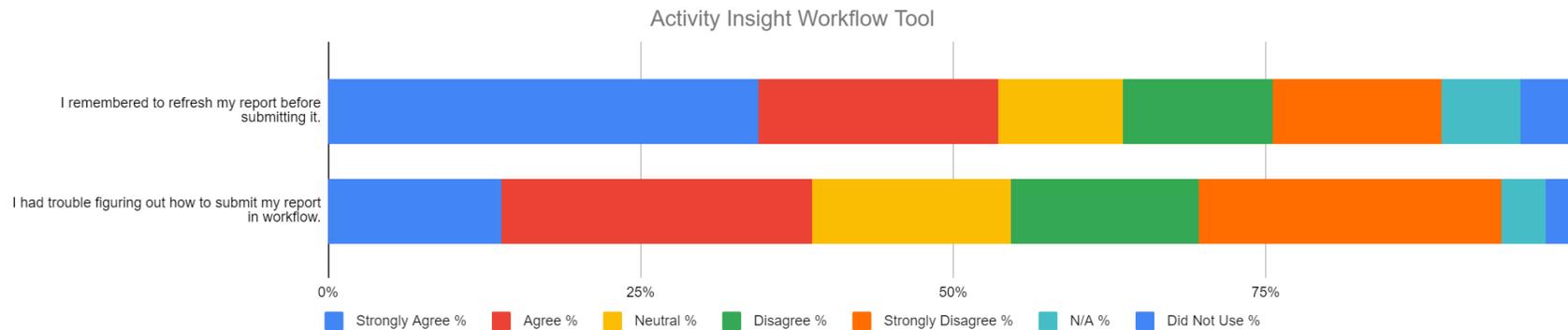
Several faculty complained that they couldn't delete records. Some specifically noted that the delete checkbox is so subtle in the interface that it was difficult to use. It is apparent from the first complaints that a number of faculty weren't aware that deletion was an option.

The publication import feature was brought up in the feedback. The feedback included the following:

- The lack of ORCID support was a problem
- Importing created messy records that had to be cleaned up
 - Each chapter of a book was brought in separately
 - Google Scholar imports were messy
 - Presentations come in with the import but are not put in the presentations screen
 - Bibtex doesn't support very many types of publications
 - Latex import is not supported

The publication screen received a set of specific comments. Faculty found the ordering of the publication input fields to be confusing and not in line with what they find in other citation systems. Additionally the display of the publication information on the summary screen was not conducive to review - the year is not displayed plus faculty wanted to see the summary of publications in standard citation format. They said it would make their review far easier with this more familiar presentation.

Workflow Submission Tool



Across all faculty, the majority agree that they remembered to refresh their report before submitting it. Respondents were mixed in their assessment of their ability to figure out how to submit their report.

In the open-ended feedback, faculty identified that it wasn't intuitive how to submit their annual report. They pointed out that the submit action is hidden, making it hard to submit. Additionally, the end product was identified as not being usable for merit review. It takes numerous clicks to get to a PDF for each faculty member individually. Instead, a faculty member offered that it would be better for administrators to simply access the data for their faculty directly in Activity Insight. Additionally, the workflow setup used in 2019 annual activity reporting is not available for use with review committees which was seen as a drawback. One faculty member reported that they weren't even sure if their report had been submitted and received.

General Comments

A small set of the feedback was more general. Several faculty said the system would not be suitable for CV generation and the fact that it duplicates faculty's own CV made the system a waste of time. Comments ranged additionally from the lack of suitability for a biosketch creation system to the annoyingness of the generated email reminders, especially when the deadline changed but the reminders' content did not.

Top Three Positives

121 of the 197 polled faculty provided input on the positive aspects of the system and the annual activity reporting experience. 36% of these respondents said the integrated data was a positive. 13% said the publication import feature was a positive. Another 13% also reported that there was nothing positive about the system or their experience.

Other frequently identified positive aspects are:

- The ability to reuse the data - enter it once and use it in many ways
- Reasonable system, overall good
- Big improvement over past systems
- Easy to use
- Good technical support
- Annual report template is good
- Menus are intuitive

One department chair reported that they were able to use the system to compile three and five year reviews for each of their faculty using the systems, which they found to be a plus.

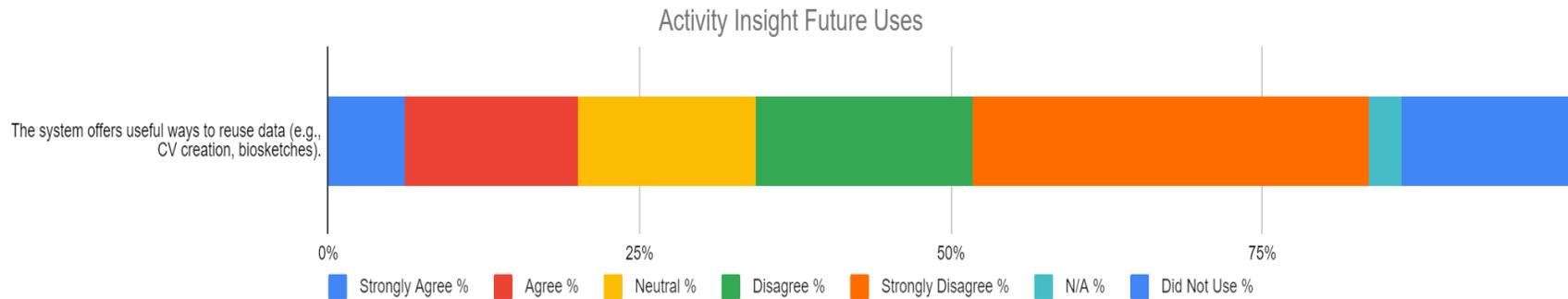
Recommended Improvements

117 of the 197 respondents provided ideas on ways to improve the system. These are presented in order of their frequency of being recommended:

- Provide ability to import in bulk
- Improve the publication import feature, especially with ORCID and Google Scholar
- Provide better examples and instructions for use from an individual unit's perspective, not campus-wide
- Let faculty cut and paste blocks of information from their CV (e.g., publication citations; presentation citations)
- Have support staff enter the data from faculty's CVs
- Ensure that the system matches the UMD CV template

- Don't use a single campus-wide report format
- Improve the report format

Anticipated Uses in the Future



44% of the survey respondents provided input on the open ended question of potential future uses of the system. Of those respondents, 23% stated that there was nothing additional that they would use the system for in the future. Some did report uses such as for CV generation, generation of a CV for a website, biosketch creation, annual and merit reviews within a unit, extension teaching data, COI lists, expertise database, and as a way to automatically get their publications added to DRUM.

Conclusion

Key findings from the survey include:

- Faculty overwhelmingly report that the reporting process is tedious. It involves a lot of clicks to get to the right data screen and to enter the information.
- Faculty were not able to always easily identify where to report their activities. This added to their frustration as they spent time searching for the right place to report an activity, and potentially determining that it was entered on the wrong screen (with no way to automatically shift that data to the right screen).
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- Faculty do not believe that the means of collecting the annual reporting information is well aligned with the report output, or with ways that activity data was reported in the past.

Based on these findings, we offer the following recommendations:

- The Activity Insight project team should work with its advisory group to understand the anticipated use of the system for reporting by professional track and librarian faculty, and align the configuration with its planned use.
- The training, on-screen informational text and user guides should be aligned with a clear message on the intended use and intent
- The project team should work with campus stakeholders and the vendor to assess squarely the ability of the system to generate the UMD CV template for campus promotion and tenure review processes. If it is possible, the team should work to fully support generation of the UMD CV template; if not, the scope of use of the platform should be clearly communicated and data screens should reflect the scope of the system's use.
- The Activity Insight advisory group should reassess the purpose and scope of the integrated Quali Research data to ensure that what is included in the platform fits the data reporting needs for the campus.

- The Activity Insight project team needs to develop “data reuse cases” that demonstrate the value of faculty time investment - such as webpages, CV export into multiple formats, and other forms of data extracts.

Appendix: Feedback Survey

Questions included in the survey which was collected using Google Forms

1. Please let us know your comments and concerns regarding the Activity Insight faculty achievement data system used for 2019 annual activity reporting by tenured and tenure-track faculty: [long text box]
2. What were your impressions of Activity Insight? [Likert scale with choices Strongly disagree/ somewhat disagree/ neither agree nor disagree / somewhat agree / strongly agree / Did not use / N/A]
 - a. The system was easy to use
 - b. The system seemed unnecessarily complex
 - c. I was able to learn to use the system quickly
 - d. I remembered to refresh my report before submitting it.
 - e. I had trouble figuring out how to submit my report in workflow.
 - f. The system offers useful ways for faculty to upload their own data
 - g. The system offers useful ways for automatically gathering faculty data (publications)
 - h. The system offers useful ways to reuse data (e.g., CV creation, biosketches)
 - i. I was able to complete my reporting requirements quickly using the system
 - j. I needed a lot of support to be able to use this system
3. Several screens in Activity Insight are auto-populated with data from other campus systems such as PHR, SIS, CourseEvalUM and Kual Research. Data in Activity Insight reflects the current state in the source systems. What were your impressions of this integrated data? [Likert scale with choices Strongly disagree/ somewhat disagree/ neither agree nor disagree / somewhat agree / strongly agree / Did not use / N/A]
 - a. I found the data loaded from the PHR system (into the Personal and Contact Information, Tenure and Rank, and Appointments at UMD screens) was helpful.
 - b. The course data loaded from SIS into the Scheduled Teaching screen was what I expected.
 - c. The course evaluation data loaded from CourseEvalUM into the Course Evaluations screen met my expectations.
 - d. The ORA-managed proposal and award data loaded from Kual Research met my expectations.
4. Please provide any additional feedback on these campus integrations: [text box]
5. What were your impressions of the design of Activity Insight? [Likert scale with choices Strongly disagree/ somewhat disagree/ neither agree nor disagree / somewhat agree / strongly agree / Did not use / N/A]

- a. The presentation of information on the screens is clear
 - b. The information - online help, on-screen messages - are clear
 - c. I was able to find the right data screen for my activities without assistance.
6. Please identify what you found to be the three most negative aspect(s) of Activity Insight?
 - a. ...
 - b. ...
 - c. ...
7. Please identify what you found to be the three most positive aspect(s) of Activity Insight?
 - a. ...
 - b. ...
 - c. ...
8. If you could recommend three improvements made to the system and/or reporting process, what would they be?
 - a. ...
 - b. ...
 - c. ...
9. In future iterations, I would like to be able to use Activity Insight for: [text box]
10. Please provide any additional comments regarding Activity Insight and the annual reporting process