Activity Insight
Spring 2020 Pilot: Professional Track and Librarian Faculty
Pilot Structure and Execution Methodology

The Activity Insight faculty data reporting system using Digital Measures by Watermark and was launched in January 2020 and used for the 2019 annual activity reporting process by tenured and tenure track faculty. This was the first use of the system for a reporting requirement, since the campus embarked on implementing the platform as the faculty data reporting system. The implementation is using a phased rollout approach, with the first user population as tenured and tenure-track. Beginning in the Fall of 2020, the next cohort of users will be added - professional track and librarian faculty. The goal is to have all paid faculty use Activity Insight to report their 2020 annual activities.

To prepare for the expansion of the system to all paid faculty, the Office of Faculty Affairs has been meeting with two advisory sub-groups to explore the unique activity reporting needs of librarian faculty and professional track faculty, and prototype configuration changes to the Activity Insight platform to better support these faculty populations.

The Spring 2020 pilot project gives the Activity Insight project the ability to investigate the usability of the Activity Insight faculty data system for the professional track and librarian faculty, and use the pilot feedback to inform improvements to the configuration as well as the training and rollout plans.

This report summarizes the feedback received and identifies recommendations and actions based on the input from professional track and librarian faculty. In this report, feedback from librarian faculty in the pilot is being considered separately from the professional track faculty.

Key Findings and Recommendations

First and foremost, the Activity Insight project team needs to work with its advisory group to address concerns that the system is oriented toward teaching and research faculty only. There needs to be clarity around the purpose of the system, and the intent in its use and reporting outputs. Once identified and fully articulated, the system configuration and reporting templates need to be re-aligned to clearly support the faculty data reporting system's purpose.

Key actions that are recommended are as follows:

- Clarify the reporting needs for all faculty including professional track and librarian faculty and ensure that the reporting goals and guidelines are clearly articulated in the user guide and training materials. This includes a better understanding of the types of advising and student engagement as well as means of documenting program administration and other administrative activities.
- Activity Insight project team should work with the schools to develop pre-defined reports for their annual review processes to support school-based needs.
● The Activity Insight project team should work with the schools to determine if separate annual report formats can be used for tenured/tenure-track faculty, professional track and librarian faculty.
● Consult with clinical faculty and administrators to better understand the reporting needs related to clinical education and service.
  ○ Modify the configuration as needed and ensure that user guides clearly articulate how clinical education and service is documented in the system.
● Re-evaluate the Tenure and Rank screen in the context of platform use by all faculty; identify means for reporting analog rank information for professional track and librarian faculty.

Pilot Findings

Validating Data from Integrated Sources

To gauge the intuitiveness of the Digital Measures system while introducing the platform, pilot participants were asked to rate the intuitiveness of Personal and Contact Information screen and the Appointments at UMD screen, data screens that are automatically populated by an integration with the PHR system.

When asked to rate the ease of use in validating these screens, 74% of the professional track faculty participants reported that it was easy or very easy to validate the data on these screens. When asked to provide feedback related to the review of this information, the majority again said that it was easy to verify the information.

Among the librarian faculty, 83% said it was easy to validate the PCI data. The majority had positive feedback on their experience validating the PCI data.

Some participants from both faculty groups did raise questions about some of the data fields on the two screens, asking what the 'Fixed Line' header means, and what the 'Address' fields are used for.

Faculty were also asked to review auto-populated data from other campus systems.

Among the professional track faculty, nearly 90% reported that they did review the other integrated data. In written feedback, 72% of the professional track faculty reported they were able to easily review this data and found it for the large part to be correct. A couple of positive comments are worth sharing:

● This all was very helpful….This is a big step forward.
● I was surprised how much information was populated. There was information contained there that I have not been able to find anywhere else and it was organized in a clear and easy to follow manner.
That being said, PTK faculty also reported specific issues with the integrated data which strongly echoes feedback that has been encountered in supporting the tenured and tenure-track users:

- The appointments listed in Appointments at UMD are confusing: some of the titles are not what they expected, and there are many more entries than what the faculty member expected to see.
- Some ORA information seems to be missing.
- Some course listings are not correct.
- The limited set of course evaluation data (quantitative metrics without qualitative assessments) did not meet expectations.
- It was unclear to faculty how they should remedy errors they encountered.

Considering the limited training pilot participants had in approaching their use of Activity Insight, these results are largely positive.

All of the librarian faculty reported that they reviewed the data that had been brought in from campus systems.

The majority of librarian faculty provided positive feedback in relation to the integrated data: they were happy to see their appointments, information from ORA, SIS and the CourseEvalUM systems. One participant found an issue with data on the Tenure and Rank screen; they followed the on-screen instructions and reported the error. Another librarian identified that the Tenure and Rank screen didn’t have their current rank nor did it identify the date they started as an associate faculty.

ACTION:

- Re-evaluate the uses and needs for the Personal and Contact Information fields, especially some of the obscure field labels.
- Re-evaluate the Tenure and Rank screen in the context of platform use by all faculty; identify means for reporting analog rank information for professional track and librarian faculty.
- Use tool tips to clarify the meaning of these fields and their use in reporting.
- Work with the vendor to improve the informational text on the integrated data screens to better communicate how data errors can be reported.
- Improve explanations on the sources and use of the integrated data in the training and support guides.

Adding Activities

While some of the faculty's activity information is automatically populated in the system through campus integrations, there are a wide variety of other activities that are not available from enterprise campus systems and faculty must enter these manually in Activity Insight. Finding the right screen for a particular activity involves identifying the right screen from the set of 56 options available.

Contributions Screen Use

Through consultation with the professional track and librarian advisory sub-groups, the Activity Insight project developed a prototype Contributions screen for Activity Insight to support documenting
activities that either don’t neatly fall into the traditional teaching, research and service areas, or cut across several of these areas of involvement. The screen is flexible in that it allows faculty to identify the area(s) the contribution relates to, a description and one or more accomplishments.

The pilot instructions promoted use of the existing activity data screens and gave examples for common activities and the associated data screen. Some information was provided on the use of the new Contributions screen and a few examples of its use were provided to the pilot participants.

In the pilot, 19% of the professional track faculty adopted use of this screen. Four used the screen and created five contributions entries, while three entered just one contribution entry each. Among librarian faculty, 83% had one or more entries on the Contributions screen. As with the professional track faculty, there were as many as five entries for some of the participants.

**Pilot Feedback**

Faculty were asked to rate the intuitiveness of identifying data entry screens for their activities, and adding their information. Feedback was mixed but mostly positive: 47% reported that it was easy or very easy to find the right screen for their activity data and add the information; 35% were neutral - it was neither easy nor difficult.

A more illuminating finding was that 62% of the professional track faculty and 50% of the librarian faculty reported that they were not able to document all of their activities and projects/assignments. Faculty were asked to identify what they weren’t able to include. Some of the gaps relate to issues that the Activity Insight project team has also seen in supporting tenured and tenure-track faculty:

- Publication import issues.
- Presentation data entry tedium.
- Difficulty understanding what should be entered in the various data fields.
- Preference for CV cut-and-paste feature and/or bulk data entry.
- Documenting departmental service and service outside of the university.
- Involvement in sponsored research but not in the principal investigator or co-investigator role.
- Recommendation to integrate with the OTC database for inventions and patents.

Professional track faculty reported that they are involved in program administration. Some reported that they found they could use the Contributions screen to report this work. However, they were discouraged because their use of the system led them to believe that the focus is on research and teaching:

- "The primary part of my job - to run my program - is not actually going to be rewarded or seen."
- "I am neither a researcher nor a teacher, so the primary difficulty is in knowing what to include in the first place and how to crowbar it into a system designed for researchers and teachers."

Other professional track faculty identified specific activities they are involved in within their departments that didn’t seem to fit in the system:

- Clinical education and service.
● Working with students
  ○ Advising graduate students on practical applications of their research.
  ○ Advising GEMSTONE thesis committees.
  ○ Advising of student organizations.
  ○ Mentoring undergraduate students.
  ○ Supervising students in their field placements for practicums and internships, as well as pre-service teachers/interns during their internships in schools.
  ○ Support for documenting mentoring and advising by professional track faculty, which is not the same as for tenured/tenure-track faculty.
  ○ Writing letters of recommendation for students.

● Program administration and other administrative activities
  ○ Degree planning.
  ○ Reaccreditation efforts for a program.
  ○ Creation of teaching and advising handbooks for departmental faculty.
  ○ Departmental representative at university "summer camps."
  ○ Fundraising activities for the department.
  ○ Peer teaching evaluations.

Among librarian faculty involved in the pilot, specific gaps that they documented are particular to their librarian roles:

● Advising of GEMSTONE teams.
● LibInsights data/activities - reference consultation.
● Libguide/public web page creation.
● Library instruction in the classroom, which is not part of the SIS data.
● Understanding where to document classes and workshops taught over the year.

One librarian reported wanting to have a crosswalk between FMARF and Activity Insight. Another reported that this duplicated the FMARF effort.

ACTIONS:
Some of the feedback identifying challenges in adding activities correlates with tenured/tenure-track faculty's experience. This points to a need to take the following actions in the Activity Insight project team:

● Revisit the design of the set of Service and Outreach screens and their options to ensure they meet campus needs and are intuitive in their labeling and options.
● Revamp the on-screen explanatory text and the user guide to clearly indicate the use of each screen and offer examples of activities that are associated with the screen.
● Create a detailed user guide for the Contributions screen and provide examples of its use.
● Create detailed training to help users understand what content is required and what is optional for reporting.
● Provide feedback to Digital Measures on the desire for a CV cut-and-paste feature as well as support for bulk data entry.
● Re-evaluate the types of faculty involvement in sponsored research with ORA and the Activity Insight Advisory Group, possibly expanding beyond principal investigators and co-investigators for faculty reporting.
● Explore campus integration opportunities to support invention and patent data import.

The other category of feedback from pilot participants focuses on the types of involvement professional track faculty have on campus and their perceptions on their ability to document this in Activity Insight. On this front, the following actions are recommended:

● Consult with clinical faculty and administrators to better understand the reporting needs related to clinical education and service. Modify the configuration as needed and ensure that user guides clearly articulate how clinical education and service is documented in the system.
● Clarify the reporting needs for all faculty including professional track and librarian faculty and ensure that the reporting goals and guidelines are clearly articulated in the system’s informational text, user guide and training materials. This includes a better understanding of the types of advising and student engagement as well as means of documenting program administration and other administrative activities.

For the gaps reported by the librarian faculty, the following actions are recommended:

● Work with UMD Libraries to understand how LibInsights data (reference consultation), LibGuides work, and library instruction in the classroom should be reported and documented in the system.
● Create an FMARF to Activity Insight crosswalk.

**Reports**

Faculty were asked to rate their satisfaction with the platform’s quick-report feature, Rapid Reports. 70% reported being satisfied with the ability to generate a report in the system. Librarian faculty in the pilot all reported being satisfied with the ability to generate a report in the system.

When professional track faculty were asked about their satisfaction with the generated annual report, the results were mixed: 47% were satisfied with the report, 17% were neutral in their satisfaction and 35% were dissatisfied with the generated report. Results were also mixed on the reported satisfaction with the generated report among the librarian faculty in the pilot: half of the participants found the generated report satisfactory, 33% were neutral in their response and 17% were dissatisfied with the generated report.

Half of the professional track faculty provided positive written feedback on the generated report, stating that it was easy to generate and easy to read. One in four reported that the report format was unacceptable and roughly one in four reported that there were gaps in what they had added in the system versus what was included in the report.
Relating to problems with the report format, professional track faculty feedback fell into several categories:

- The font and headings were poorly chosen and led to a report that was difficult to read.
- The sections of the report were more geared toward tenured/tenure-track faculty which didn't serve the professional track faculty. In particular, report fields related to tenure rank in the beginning section were reported as irrelevant for a professional track faculty's report.

Librarian faculty in the pilot reported encountering a system bug with the inclusion of rich text in the generated report and a known report format error where '&' symbols were added after editors' names in citations.

In relation to the gaps with the report in relation to the activity data in the system, professional track faculty reported that details they had entered on data screens were not included in the generated report. They reported that some or all of the integrated data did not appear in the generated report. They also reported that there was no indication of their rank in their professional track.

Likewise, one librarian indicated that they were interested in seeing a more robust citation format for publications and presentations, that included the description field.

Specific to librarianship, feedback outlined the following:

- Instructional statistics from Springshare are needed in the Instructional Activities section.
- Librarianship should not be part of Research Activities.
- Collection duties need to be represented better.

RESPONSE:

The pilot ran concurrent with the extended annual activity reporting process for tenured/tenure-track faculty. Since a particular pre-configured annual report was needed for the 2019 annual reporting process, the prototype report for the pilot was given a report name in the system that placed it far down in the list of report options - Work in Progress Draft Report.

An analysis of report usage in the Activity Insight platform (administrative report) during the pilot period found that only one of the pilot participants used the correct Work in Progress Draft Report template.

Concern for this possible issue caused the pilot team to issue a follow-on request with explicit instructions for use of the Work in Progress Draft Report template coupled with a resending of the report-related survey questions. Twenty eight pilot participants responded to the follow-on reporting survey; all had used the Work in Progress Draft Report during the time of the second survey. Their second set of responses are what has been used in this report.

We can conclude that the issues faculty reported with the report format and gaps in what was reported are not related to use of the incorrect report format.

ACTIONS:
- As one faculty member recommended, the Activity Insight project team should work with the schools to develop canned reports for their annual review processes to support school-based needs.
- The Activity Insight project team should work with the schools to determine if separate annual report formats can be used for tenured/tenure-track faculty, professional track and librarian faculty.
- Work with UMD Libraries to ensure that librarianship activities are included in the correct report sections and ensure that the types of librarianship activities can be represented.
- Work with the vendor to improve the report format regarding font choice, and heading styles.
- Ensure that on-screen information and user guides clearly articulate what data is included in the reports so that users understand where to enter their information.

Appendix: Supporting Materials

Methods

Pilot volunteers were solicited from all colleges through the associate deans for faculty affairs, as well as through the committee members of the PTK Symposium. A call for volunteers was also presented at the Fall 2019 PTK Symposium.

Initially, sixty-one professional track faculty members and seven librarian faculty, a total of sixty-eight participants volunteered to participate in the pilot, with representation from across all colleges on campus. These volunteers were polled for pilot participation availability to organize a set of small group sessions scheduled between March 23, 2020 and April 24, 2020. A pre-pilot survey was also conducted to better understand the activities professional track and librarian faculty were involved in, to customize the pilot instructions for faculty based on their involvement. The sessions were designed based on the number of participants from that college and pilot location. Grouping participants together by the college would have allowed the team to develop a more comprehensive understanding of the needs of each college.

However, due to the COVID-19 situation, the University of Maryland shifted to telework after the spring break. As a result, the initial pilot structure was changed from in-person group sessions to individual - remote sessions. To facilitate the remote pilot structure, a pilot instruction document was created based on the pre-pilot survey results. Using the instruction document, participants were asked to explore the platform and complete a list of tasks as per their availability, beginning March 31, 2020, and share the feedback using a Google form by April 24, 2020. Librarian faculty participating in the pilot were given an additional guide, developed by librarians who have been involved in the Activity Insight implementation. Librarian faculty submit a Faculty Annual Performance and Merit Review form each year for merit review; this guide crosswalked the form's reporting areas to the Activity Insight data screens for the pilot participants. Thirty six professional track faculty and six librarian faculty completed the pilot and submitted a feedback form, out of the original set of sixty eight.