Agenda & Objectives

Meeting Agenda

- 10:45 – 10:15: Presentation on Interfolio background, what technologies we’re striving to provide for higher education and review of platform modules
- 11:15 – 11:30: Q&A

This meeting will be successful if...

- Interfolio team leaves conversation with a deeper understanding USG’s goals, challenges and solution requirements
- USG institutions gain further understanding of how Interfolio as a solutions provider can help them address their needs in the areas of faculty activity reporting, faculty recruitment and/or RPT process
- Interfolio and USG institutions establish enough synergy and excitement to continue the conversation on an individual basis in the coming weeks
Higher education is undergoing a sea change. It’s time to invest in core of academe, faculty.
“We have disparate systems, tools that address one piece of the puzzle, or that are only being used in one department and we never end up with good results. **We need to make an investment in a tool that addresses our data needs, provides faculty useful tools, and supports shared governance in one place.**"

Head of Faculty Affairs,
Large Private R1 Institution

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The Solution? Holistic Faculty Decision and Support Coverage

The ideal solution covers every moment in the faculty lifecycle.

**APPLY**
Scholars compile their CV and materials for opportunities

**HIRE**
Benchmark CV and EEO information

**REVIEW**
Annual submission of publications, classes, and activity

**SERVICE**
Committee decisions that steer the course of the institution

**TENURE**
Career milestone and assessment with lasting institutional impact

**SABBATICAL**
Opportunity to check in with advanced scholars

**PROMOTION**
Continued engagement in the institutional mission

interfolio
Customers at the Center of Our Product Strategy

Interfolio continuously evolves to meet your challenges.

**Continuous Discovery** occurs throughout the year allowing us to form hypotheses around:

- Feature Design
- Quarterly Product Priorities
- Longer Term Vision

**Feedback & Validation** solicited throughout the year from institution leaders and users:

- Interviews
- Product Testing
- Observational Testing
- Advisory Groups

**Product Roadmap** reviewed and refined quarterly and shared through client success and webinars, providing greater transparency to campus guide planning.

**Over 100 Conversations in 2016**

- 20+ Senior Administrators Interviewed
- 50+ Academics Participated Product Usability Testing
- 30+ Academics Interviewed for User Research
What’s Needed From The Ideal Faculty Tech System

R&D from 100+ institutions yields 7 key factors for faculty tech success

- Give faculty tools to support service, advancement, networking, and grant seeking
- Institutionalize processes to promote greater transparency and equity
- Streamline reporting for institutional compliance and accreditation
- Enable diversity goals, standardize faculty hiring and tenure processes
- Strategically allocate faculty time and resources through improved access to data
- Provide higher quality data for committee and academic decisions
- Minimizing manual processes to reduce inefficiencies and financial strain

Single, Institution-Wide Faculty Platform
A Virtuous Cycle Built Around Faculty

Comprehensive platform brings together disparate systems, data, and processes

**Tools for Faculty**

**Showcase**
- Fielded and File Based Artifact Collection from Day 0
- Visibility to Review requirements

**Engage, Network**
- Discover collaborators
- Get and give feedback

**Submit, Re-use**
- Feedback flows across lifecycle moments
- Portable: data and artifacts move with scholar across institutions
- Private to the faculty

**Tools for Institution**

**Shared Governance Platform**
- Standardized Decision Criteria
- Secure Decision Workflows
- Unified Committee Workspaces

**Institutional Reporting and Analytics**
- High quality data, actively validated by faculty
- Validated Faculty Activity Data
- Faculty Activity Reporting
- Compliance Reporting

**interfolio**
Our Next 12 Months

Bringing Clients and Platform Forward, Together

Discovery, Research, Listening

Beta Release of combined platform

General Availability of combined platform

Continue regular releases for enhancements and client reported issues (Interfolio and DATA180)

Our Guiding Principles

Maintain continuity and meet or exceed current levels of service

Provide a natural, evolutionary upgrade path when each institution is read

Realize a combined platform architecture in the first 12 months
Our Roadmap: An Enterprise Faculty Lifecycle Platform

Interfolio’s proposed future roadmap to encompass every faculty moment

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**Strategic Insights**

*Advanced data visualization* capabilities to explore new strategies and advance sustainable, institutional success

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**Faculty Activity Reporting**

*Consistent, curated, and validated data* about faculty teaching, research, and service activity provide unprecedented reporting to support essential accreditation and compliance requirements

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**Shared Governance Workflow Platform**

- **HIRE**
- **REVIEW**
- **SERVICE**
- **TENURE**
- **SABBATICAL**
- **PROMOTION**

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**Lifelong Dossier**

Cloud-based service allows for the continuous, organic curation of scholarly materials as they occur over the lifetime of their academic career from reviews, to promotion, tenure, grant applications, and interdisciplinary networking...
Demo

Interfolio’s ByCommittee + Data180’s Faculty180
Interfolio’s Current Product Offering

- **Data180’s Faculty180**
  Faculty Activity Reporting Module

- **ByCommittee**
  Faculty Hiring Module

- **ByCommittee**
  Review, Promotion, & Tenure Module
Data180’s Faculty Activity Reporting Software
Ideal for reporting on the professional activities of faculty

- **Administrators** maintain a central hub of validated faculty data to produce necessary compliance and accreditation reports

- **Faculty** save time without repeated requests for data

- **Faculty** can produce activity reports in the form of CVs and Biosketches for grant applications and reviews

- **Institution** can auto-populate data by integrating with other systems (campus SIS, ORCID, Pub-Med, etc.)

"Data180 helped us develop a complex set of integrations that included **multiple legacy systems, sponsored projects grant data, work history information, and teaching data**. As is inevitable in such complex projects, we faced challenges in mapping the information and displaying it in an intuitive manner. Data180 has been a very responsive and innovative collaborator in addressing those challenges."

Tom Miller, Ph.D.
Vice Provost, Office of Faculty Affairs
The University of Arizona
Data180’s Faculty180 for Faculty Activity Reporting
Customizable to any institutional requirement or need

**INPUTS**
- Migration of prior faculty activities
- Integration with data sources
- Input by Faculty and Administrators

**OUTPUTS**
- CVs, Biosketches, Performance Reports
- Data mining & visual analytics
- Reports (ad hoc, accreditation, custom)
- Data pushed to campus repositories

interfolio
Robust Integration Opportunities

Faculty180 Integrations:

- ERP Systems
- Publication Databases
- Reference Management Software
- Grant Databases
- Course Evaluation Systems
- CV Migration Systems
- Authentication Systems
- Institutional Repositories
Faculty180 Module: Report Types
Customize reports for all of your institution’s needs.

### Accreditation Reports
Fulfill licensing body demands.

### Research Reports
See all research activity in one place.

### Custom Reports
Create reports as needed for institutional requirements.

### Individual Faculty Reports
Single reports of faculty activity for simple milestone submission.

#### Activity Reports

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile Report</td>
<td>Personal information, work experience, degrees, licenses, memberships, honors, interests, biographies, and more</td>
</tr>
<tr>
<td>Activity Input Report</td>
<td>Teaching (e.g., enrollment, credit hours), grants, service, professional development, consulting, and more</td>
</tr>
<tr>
<td>Scholarly Activities</td>
<td>Research, publications, and creative productions</td>
</tr>
<tr>
<td>Grants</td>
<td>Grant activities and funding data</td>
</tr>
<tr>
<td>Courses Taught</td>
<td>Enrollment, credit hours, teaching load, and course sections</td>
</tr>
<tr>
<td>Activities By Activity Classifications</td>
<td>Activities grouped by classifications</td>
</tr>
</tbody>
</table>

#### Administrative Reports

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ad Hoc Reports</td>
<td>Report building by selecting data to represent each column: faculty information, faculty classifications, activity input counts, and profile activity counts</td>
</tr>
<tr>
<td>Activity Overview - By Faculty</td>
<td>Activities by units and faculty members within those units</td>
</tr>
<tr>
<td>Activity Overview - By Semester</td>
<td>Activities by units and the semesters within those units</td>
</tr>
<tr>
<td>Faculty Classifications</td>
<td>Faculty members organized by classification rank, tenure status, and other faculty classifications</td>
</tr>
</tbody>
</table>
Faculty180 Module: Reporting, cont’d

Sample custom report for teaching, grants, and service.

### Activity Input Report

<table>
<thead>
<tr>
<th>Activity</th>
<th>Count Only</th>
<th>Spring 2012</th>
<th>Fall 2012</th>
<th>Spring 2013</th>
<th>Fall 2013</th>
<th>Spring 2014</th>
<th>Fall 2014</th>
<th>Spring 2015</th>
<th>Total</th>
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</thead>
<tbody>
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<td>Teaching</td>
<td>8,462</td>
<td>24,298</td>
<td>30,035</td>
<td>29,178</td>
<td>18,047</td>
<td>8,926</td>
<td>9,351</td>
<td>128,057</td>
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<tr>
<td>Advising Load</td>
<td>25</td>
<td>10</td>
<td>1,220</td>
<td>1,070</td>
<td>0</td>
<td>740</td>
<td>716</td>
<td>3,781</td>
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<tr>
<td>Professional Development</td>
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<td>197</td>
<td>197</td>
<td>199</td>
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<td>199</td>
<td>1,387</td>
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</tr>
<tr>
<td>Institutional Committees</td>
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<td>344</td>
<td>344</td>
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<td>Other Institutional Service</td>
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<td>78</td>
<td>78</td>
<td>78</td>
<td>78</td>
<td>78</td>
<td>78</td>
<td>546</td>
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<td>Professional Service</td>
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<td>33</td>
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<td>Grants</td>
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<td>17</td>
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<tr>
<td>Consulting</td>
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<td>8</td>
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<td>8</td>
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<td>Other</td>
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<td>27</td>
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<td>Local Community Service</td>
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<td>0</td>
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<tr>
<td>Community Service</td>
<td>29</td>
<td>29</td>
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<tr>
<td>Totals</td>
<td>9,239</td>
<td>23,051</td>
<td>31,192</td>
<td>30,994</td>
<td>18,027</td>
<td>10,406</td>
<td>110,007</td>
<td>137,016</td>
<td></td>
</tr>
</tbody>
</table>

Footnote: A faculty member’s activities occurring before being employed by the institution will not be included. See faculty members’ dash for a complete listing of their activities.
Faculty180 Module: Search Your Institution

Features provide value to individual faculty members.

- **Store Data for Future Use**
  Save faculty time by storing data in central hub

- **Search Across Institution**
  Find information with a simple search

- **Search for Faculty Expertise**
  Connect to colleagues for research and grant collaboration
Faculty180 Module: Faculty Exports

**Export to CV**
Simple export to PDF or url with live links to publications

**Export Biosketches**
Templates for fast production of grant application materials
ByCommittee: Shared Governance Expertise

**ByCommittee**

- Addresses all shared governance requirements and nuances
- Lends efficiency to committee work
- Drives equity and compliance around diversity initiatives
- Provides equitable and fair process for individual faculty
- Ensures transparency and standardization around hiring and review
### Faculty Search Module: Applicant List

**Committee’s View of a List of Applicants**

<table>
<thead>
<tr>
<th>Applicants</th>
<th>Add</th>
<th>Filter</th>
<th>Keyword Search</th>
<th>Saved Views</th>
<th>Columns</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>APPLICANTS</strong> (1 of 1)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>HIGHEST DEGREE EARNED:</strong></td>
<td><strong>APPLICATION STATUS:</strong></td>
<td><strong>TAGS:</strong></td>
<td><strong>Columns</strong></td>
<td><strong>Save Default</strong></td>
<td></td>
</tr>
<tr>
<td>☐ Ph.D. - Doctor of Philosophy</td>
<td>Finalist - Campus Visit</td>
<td>GD</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>☐ A.B.D. - All But Dissertation</td>
<td>Hired</td>
<td>BR</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>☐ Longlist</td>
<td>Longlist</td>
<td>CW</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>☐ Offer Pending</td>
<td>Offer Pending</td>
<td>DW</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>☐ Shortlist</td>
<td>Shortlist</td>
<td>JC</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>☐ EEO Candidate</td>
<td>EEO Candidate</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>☐ Offer declined.</td>
<td>Offer declined.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>APPLICATION NAME</strong></td>
<td><strong>DATE UPDATED</strong></td>
<td><strong>TAGS</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lizzie Bennett</td>
<td>Nov 9, 2014</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>☐ A.B.D. - All But Dissertation</td>
<td>Jane Austen University</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>☐ Hired</td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Alton Brown</td>
<td>Aug 6, 2016</td>
<td></td>
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<tr>
<td>☐ Ph.D. - Doctor of Philosophy</td>
<td>University of Texas at Austin</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>☐ Finalist - Campus Visit</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Robert Catchit</td>
<td>Nov 9, 2014</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>☐ Ph.D. - Doctor of Philosophy</td>
<td>Dickinson Institute</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>☐ Offer extended - Second Choice</td>
<td></td>
<td></td>
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<tr>
<td>Edmond Dantes</td>
<td>Nov 9, 2014</td>
<td></td>
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<tr>
<td>☐ Finalist - Campus Visit</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Thorough Committee Review
See confidential letters and submission of scholarly material.

#### Prioritize Top Applicants
Organize and sort hundreds of applicants to save time.

#### Set Criteria
Establish dept-specific criteria to ensure fairness in review.

#### Rate and Discuss
Enable committee efficiency with tools to rate, filter, sort, and discuss applicants.
Faculty Search Module: Applications Report

Insight into applicants and search details

Institutional Insight
See your entire institution’s faculty search process at a glance.

Track Searches
See details of all searches and application.

Custom Forms
Solicit information custom to each department or college, such as publication history or advisor name.
**Faculty Search Module: EEO Reporting**

**Administrator and Diversity Officer View of EEO Reporting**

### 100% Compliance on EEO Data
Receive EEO data on all faculty applicants.

### Produce Diversity Reports
Fulfill compliance and institutional requirements.

### See Applicant Source
Drive recruitment efforts by seeing the source of applicants.

### Drive Faculty Diversity
Apply new transparency into diversity data to drive initiatives on campus.

#### Gender

<table>
<thead>
<tr>
<th></th>
<th>Male</th>
<th>Female</th>
<th>Declined</th>
<th>Other</th>
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<tbody>
<tr>
<td>Total</td>
<td>15</td>
<td>2</td>
<td>1</td>
<td>2</td>
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</table>

#### Underrepresented Minority

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<tr>
<th></th>
<th>Latina</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>1</td>
<td>0</td>
</tr>
</tbody>
</table>

#### Disability Status

<table>
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<th></th>
<th>Has Disability</th>
<th>No Disability</th>
<th>Declined</th>
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<td>15</td>
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</tbody>
</table>

#### Veteran Status

<table>
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<tr>
<th></th>
<th>Veteran</th>
<th>Not a Veteran</th>
<th>Declined</th>
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</thead>
<tbody>
<tr>
<td>Total</td>
<td>15</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

#### Race / Gender

<table>
<thead>
<tr>
<th>Gender</th>
<th>American Indian</th>
<th>Asian</th>
<th>Black &amp; African American</th>
<th>Native Hawaiian or Pacific Islander</th>
<th>White</th>
<th>Multiple or Other Race</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>1</td>
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<tr>
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<td>1</td>
<td>1</td>
<td>1</td>
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<td>1</td>
<td>1</td>
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</tbody>
</table>

#### Ethnicity / Gender

<table>
<thead>
<tr>
<th>Gender</th>
<th>Hispanic / Latina</th>
<th>Not Hispanic / Latina</th>
<th>Declined</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>1</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Female</td>
<td>1</td>
<td>2</td>
<td>0</td>
</tr>
</tbody>
</table>
Promotion & Tenure Module: Review Case List
Committee View of a List of Review, Promotion, or Tenure Cases

Promotion & Tenure Cases

Cases (30)

Search

View Active ▼ Browse By All Units ▼ Sort By Name ▼ SELECTED CASES (0)

Jamie Absalom
Department of English
Template: Arts & Sciences - Tenure
Current Step: Departmental Administrator - English
Voting Completed

Greg Baxter
Department of Physics
Template: College of Computer, Mathematical, and Natural Sciences Associate to Full Professor
Current Step: Department of Physics Tenure Review Committee
Needs Administrative Review

Marti Bogart
Department of English
Template: A&S Promotion to Full Professor
Current Step: Case is Being Created
External Evaluations Requested

Jane Cha
Department of English
Template: Arts & Sciences - Tenure
Current Step: Case is Being Created

Manage Committee Work
See all cases for which you serve on a committee at one time.

Determine User Roles
Keep documents & decisions safe with user roles for every level.

Gain Transparency
Plan the year ahead by managing all cases centrally.

Save Time
Request, manage, and distribute all cases and steps digitally.

interfolio
Promotion & Tenure Module: Workflow Steps
Administrator or Staff View of All Steps of Evaluation Process

Customize to Your Process
Replicate all existing steps and permissions.

Standardize with Templates
Copy and edit dept and college-level templates.

Documented, Fair Process
Create consistency for all committees and candidates.

Shared Governance Nuance
Create ad hoc committees, request external evaluations, accommodate rebuttal and more.
ByCommittee: Document Viewer

Committee View of Online Documents in all ByCommittee Modules

Online Review
Application is mobile and tablet friendly.

Increase Access and Equity
WCAG 2.0 compliant, anytime/anywhere access.

Annotations and Rating
Private “sticky-note” capabilities and tools for collaboration.

Chapter View
Easy to move back and forth between documents and cases/applicants.
ByCommittee: Faculty Dossier Experience

Individual Faculty Member’s View of Their Interfolio Dossier

Professional, Helpful
Simple, straightforward tools for applicants and faculty up for review.

Scholar Tested
Superior user experience, regularly tested with faculty.

Private Curation Space
Plan ahead by compiling artifacts for various opportunities.

Facilitate Easy Document Collection
Set deadlines, request new documents, send forms.
Our Company: 33 Combined Years of Experience
Serving Faculty, Committees, and Institutions Holistically

**INTERFOLIO**
- 9,000+ Faculty Members Hired
- 2,500+ Tenure Cases Decided
- 125+ Campus Partners
- 99% Renewal Rate

**DATA180**
- Founded by Two Faculty: 2002
- 60+ Campus Partners
- 830k Scholarly Works for
- 56k+ Faculty
Our Community: 200+ Institutions Investing in Faculty
Recognition at private, public, liberal arts, medical, and research campuses

PRIVATE RESEARCH
American University
Baylor University
Boston College
Brandeis University
Duquesne University
Fordham University
Johns Hopkins University
Massachusetts Institute of Technology
New York University
Northern Arizona University
Pepperdine University
Rice University
Southern Methodist University
Stanford University
Tufts University
Tulane University
University of Chicago
University of Delaware
Vanderbilt University

PRIVATE MASTERS
Clemson University
Lebanon Valley College
North Central College
Santa Clara University
University of Delaware

(Selection)

MAJOR PUBLIC RESEARCH
Arizona State University, Tempe
Bradley University
California State University, Chico
California State University, East Bay
California State University, Monterey Bay
Eastern Illinois University
Humboldt State University
Kent State University
Purdue University Northwest
San Diego State University
San Francisco State University
San Jose State University
University of Louisville
University of Maryland, Baltimore County
University of North Carolina School of the Arts

LARGE PUBLIC
Appalachian State University
Boise State University
Bowling Green State University
Cleveland State University
Cal Poly San Luis Obispo
California State University, Chico
California State University, East Bay
California State University, Monterey Bay
Eastern Illinois University
Humboldt State University
Kent State University
Purdue University Northwest
San Diego State University
San Francisco State University
San Jose State University
University of Louisville
University of Maryland, Baltimore County
University of North Carolina School of the Arts

LIBERAL ARTS COLLEGES
Allegheny College
Alma College
Amherst College
Augustana College
Bard College
Bates College
Bryn Mawr College
Bucknell University
Centre College
Coe College
Colby College
Columbia College Chicago
Middlebury College

RELIGIOUS INSTITUTIONS
Catholic University of America
College of the Holy Cross
Holy Cross Greek Orthodox School of Theology
University of Notre Dame
Ursinus College
Valparaiso University

ASSOCIATE COLLEGES
University of Hawaii Community Colleges
Waukesha County Technical College

IVY LEAGUE
Brown University
Cornell University
Dartmouth College
Harvard University
Yale University

MEDICAL SCHOOLS AND HOSPITALS
Allegheny Health Network
Children’s Hospital Los Angeles
NYU Langone Medical Center
Stowers Institute for Medical Research
City of Hope
Children’s Mercy Hospital
Nationwide Children’s Hospital

INSTITUTIONS ABROAD
Hong Kong University of Science and Technology
Queens University
Renison University College
University College London
University of Navarra

PROFESSIONAL ASSOCIATIONS
American Philosophical Society
Association for Jewish Studies
American Historical Association
Consortium for Faculty Diversity
Modern Language Association
Interfolio in Action...

Some current, relevant partner institutions (In Size and/ or Location)
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Georgia Davidis-Malone, Faculty Dossier Coordinator, Office of the Provost, Haverford College
Thank You! Q and A