# interfolio

University System of Georgia's Regents Advisory Committee on Academic Affairs

Interfolio February 8, 2017

# 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...

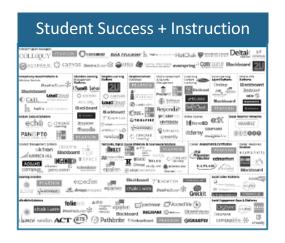
- ► Interfolio team leaves conversation with a deeper understanding USG's goals, challenges and solution requirements
- ▶ USG institutions gain further understanding of how Interfolio as a solutions provider can help them address their needs in the areas of faculty activity reporting, faculty recruitment 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

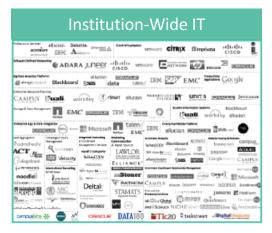


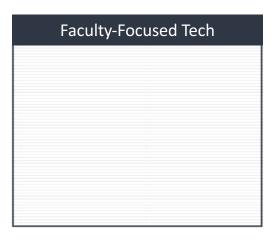


# The Essential New Category: Faculty Technology

\$25b on EdTech per year, and few providers focus on 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."



# 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



# 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

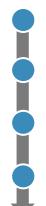


### Feedback & Validation

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+

50+

30+

Senior Administrators Interviewed

Academics Participated Product Usability Testing

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

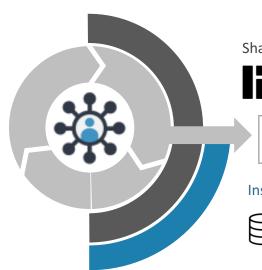
### **Engage, Network**

- 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



Secure **Decision** Workflows



Unified Committee Workspaces

High quality data, actively validated by faculty

### **Institutional Reporting and Analytics**



**Validated** Faculty **Activity Data** 



**Faculty Activity** Reporting



Compliance Reporting











**SABBATICAL** 



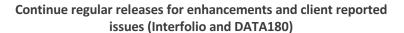
# Our Next 12 Months

# Bringing Clients and Platform Forward, Together

Discovery, Research, Listening

**Beta Release of combined platform** 

General Availability of combined platform



### **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

### **Strategic Insights**

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

### **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

### **Shared Governance Workflow Platform**







SERVICE







T

**SABBATICAL** 

**PROMOTION** 

### **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

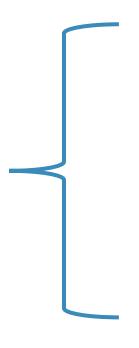
Data mining & visual analytics

Reports (ad hoc, accreditation, custom)

Data pushed to campus repositories



# 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.

### REPORTS | DEMO UNIVERSITY



### Activity Reports

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

### ▼ Administrative Reports

Ad Hoc Reports	Report building by selecting data to represent each column: faculty information, faculty classifications, activity input counts, and profile activity counts
Activity Overview - By Faculty	Activities by units and faculty members within those units
Activity Overview - By Semester	Activities by units and the semesters within those units
Faculty Classifications	Faculty members organized by classification rank, tenure status, and other faculty classifications

### **Accreditation Reports**

Fulfill licensing body demands.

### **Research Reports**

See all research activity in one place.

### **Custom Reports**

Create reports as needed for institutional requirements.

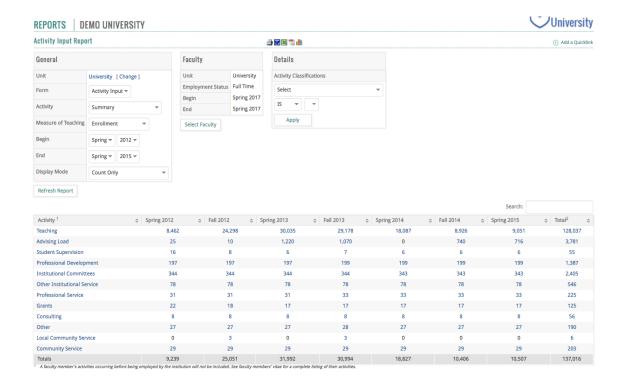
### **Individual Faculty Reports**

Single reports of faculty activity for simple milestone submission.



# Faculty180 Module: Reporting, cont'd

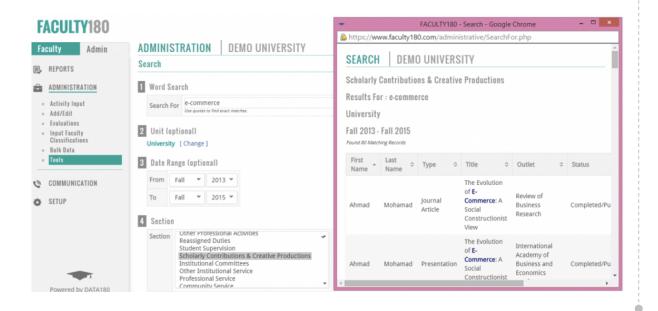
Sample custom report for teaching, grants, and service.





# 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**

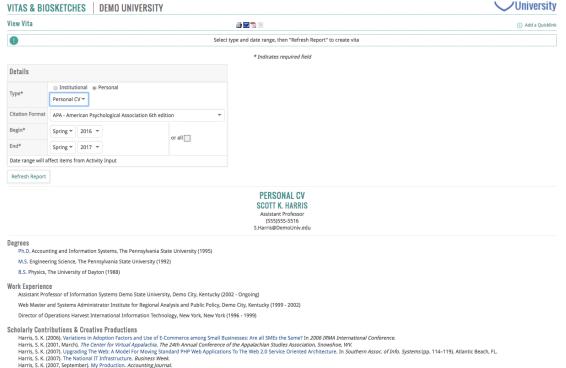
Find information with a simple search

### **Search for Faculty Expertise**

Connect to colleagues for research and grant collaboration



# Faculty 180 Module: Faculty Exports



### **Export to CV**

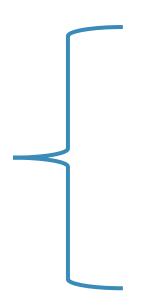
Simple export to PDF or url with live links to publications

### **Export Biosketches**

Templates for fast production of grant application materials



# ByCommittee: Shared Governance Expertise

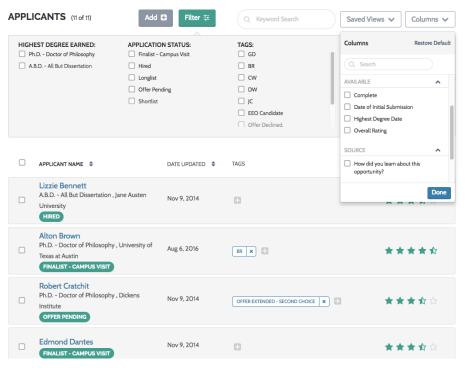


# **ByCommittee**

- 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



### **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.

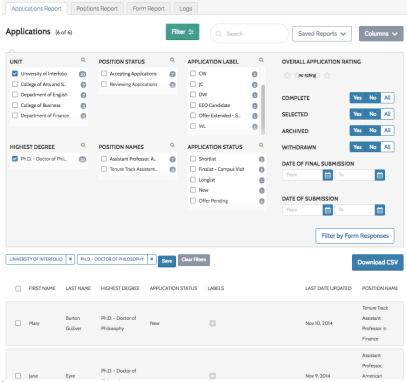
### Rate and Discuss

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

### Gender

TOTAL	MALE	FEMALE	DECLINED 1	OTHER			
15	7	8	0	0			
100%	47%	53%	0%	0%			
<sup>1</sup> Declined means the applicant chose the option "Prefer not to disclose" for the specific question.							

### Underrepresented Minority

TOTAL	URM <sup>1</sup>				
15	7				
100%	47%				
<sup>1</sup> URM includes: Hispanic/Latino (any race), American Indian/Alaskan Native, Black/African American, &					
Native Hawaiian/Pac Islander.					

### Disability Status

TOTAL	HAS (OR HAD) DISABILITY	NO DISABILITY	DECLINED 1				
15	2	12	1				
100%	13%	80% 7%					
Declined means the applicant chose the option "Prefer not to disclose" for the specific question.							

### Veteran Status

TOTAL	VETERAN	NOT A VETERAN	DECLINED 1		
15	3	10	2		
100%	20%	67%	13%		
Declined means the applicant chose the option "Prefer not to disclose" for the specific question.					

### Race / Gender

	TOTAL	AMERICAN INDIAN OR ALASKAN NATIVE	ASIAN	BLACK OR AFRICAN AMERCIAN	NATIVE HAWAIIAN OR OTHER PACIFIC ISLANDER	WHITE	MULTIPLE SELECTED (TWO OR MORE RACES)	DECLINED <sup>2</sup>
Male	7	1				4	1	1
Female	8	1	1	2		3		1
Declined	0							
Other	0							
Total	15	2	1	2	0	7	1	2
Percentage	100%	13%	7%	13%	0%	47%	7%	13%
Declined means the applicant chose the option "Prefer not to disclose" for the specific question.								

### Ethnicity / Gender

	TOTAL	HISPANIC / LATINO/A 1	NOT HISPANIC / LATINO/A	DECLINED 2
Male	7	2	5	0
Female	я	1	4	2

### 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.

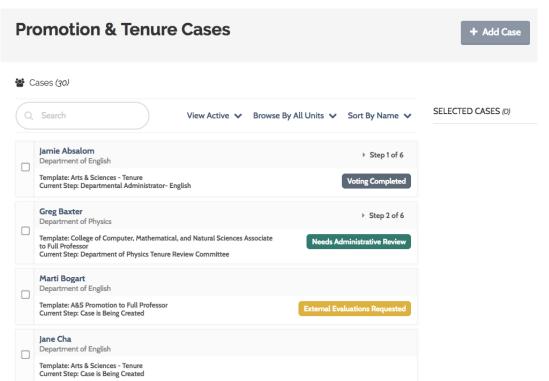
### **Drive Faculty Diversity**

Apply new transparency into diversity data to drive initiatives on campus.



# Promotion & Tenure Module: Review Case List

Committee View of a List of Review, Promotion, or Tenure Cases



### **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.

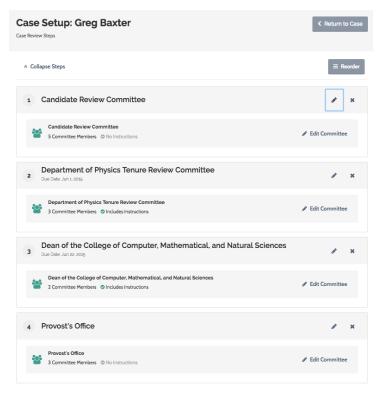
### **Save Time**

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



# 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 collegelevel templates.

### **Documented, Fair Process**

Create consistency for all committees and candidates.

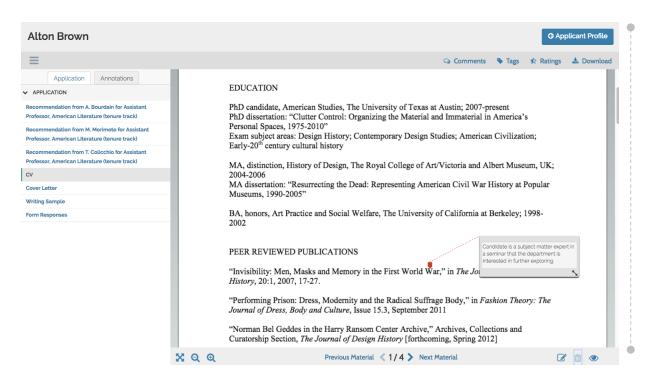
### **Shared Governance Nuance**

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.

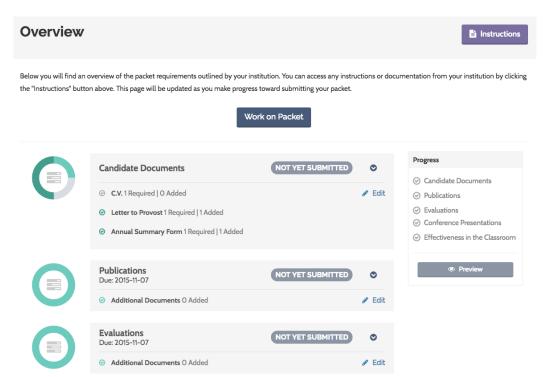
### **Chapter View**

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** 

RENEWAI

**DATA180** 

**FOUNDED** 



# 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 Northwestern University Pepperdine University Rice University Southern Methodist University Stanford University **Tufts University Tulane University** University of Chicago

### Vanderbilt University PRIVATE MASTERS

University of Miami

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

(Selection)

### MAJOR PUBLIC RESEARCH

Arizona State University, Tempe Miami University Oklahoma State University **Rutgers University** University of Michigan, Ann Arbor University of Arizona University of California, Los Angeles University of Delaware University of Missouri System University of Utah University of Virginia University of Washington, Seattle Campus

### 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

### LARGE PUBLIC

Applalachian 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 North Central 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

### 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)

























# Our Support: All Users, Monday – Friday Access

Help for administrators faculty, staff, applicants, external evaluators, and IT.

"The #1 thing I like about Interfolio is the client service.
Every time I call, they get right back to me; they always have an answer for me."

Georgia Davidis-Malone, Faculty Dossier Coordinator, Office of the Provost, Haverford College





# interfolio

Thank You! Q and A