

Case study: Case Western Reserve University

Enhancing transparency and security

Read about how Case Western Reserve University leverages Interfolio to streamline a wide range of essential faculty affairs processes



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Introduction

With eight schools and around 4,200 faculty serving more than 12,000 students, Case Western Reserve University is a leading R1 institution with research and educational opportunities spanning hundreds of degree programs.

The Faculty Affairs Office at Case Western Reserve plays a crucial role when it comes to processes and policies related to each step of the faculty lifecycle, handling appointments, promotions, tenure, sabbaticals, and other career milestones. However, the existing HR and document management tools supporting these processes not only hampered operational efficiency but also compromised transparency and security. In 2022, institutional leadership initiated a search for a solution that could help streamline efforts.

As one school at Case Western Reserve University had already seen positive results with Interfolio Faculty Search, usage was expanded across the institution. In addition, prior experience with Interfolio Review, Promotion & Tenure (RPT) at another institution led Lindsay Jacobs, Director of Faculty Affairs and Information Systems, to suggest implementing the platform at Case Western Reserve.

“We did consider developing our own in-house system to manage promotion and tenure processes,” said Jacobs. “However, we had a lot of shifting priorities and limited resources, so we decided that a vendor solution would be the better option. Since I had implemented Interfolio RPT in a previous role, I knew it would be a good solution for Case Western Reserve.”

Themes discussed:

- Making faculty hiring more user-friendly
- Greater efficiency for promotion and tenure workflows
- Transforming faculty affairs processes

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Lindsay Jacobs

Director, Faculty Affairs and Information Systems
Case Western Reserve University

Making faculty hiring more user-friendly

Before Interfolio, Case Western Reserve mostly relied on an HR system for faculty hiring, but this system wasn’t ideal for users on either side of the hiring process, resulting in cumbersome processes and an inconsistent applicant experience. “It wasn’t really the perfect solution for faculty recruitment because it was more geared toward staff hiring,” she noted. “And from what I’ve heard, it wasn’t very user-friendly.” Frustrated by the experience, some schools would simply end up using email for this process, while other schools turned to Google Forms or spreadsheets instead. “None of these are the most efficient way to manage applications — there’s always the potential for misplaced or lost documents.”

The existing HR system didn’t offer applicants the ability to confirm that their application had been received — or see where it was in the process. It also didn’t give the Faculty Affairs Office any visibility into the positions that were being posted. “What I heard from our administrators was that there wasn’t an easy way to view applications, rate applicants, request letters of reference, or report on data — all of the things that are actually needed for the faculty hiring process,” shared Jacobs. “We knew there was a better way out there to manage faculty hiring.”

Case Western Reserve implemented Faculty Search in March 2023, and the team made the transition from the old system to Interfolio in just a few months, posting all Board of Trustee-appointed positions within the platform by July. “The implementation process was quick and painless, which you can’t say about all platforms,” said Jacobs. Faculty Search has helped streamline faculty recruitment and hiring at Case Western Reserve, enabling better collaboration and organization while driving transparency. “Interfolio has helped organize the faculty search process for applicants, search committees, and administrators. Our applicants like the ease of applying and insights into the status of the position, our search committees like that they can rate and categorize applicants, and our school administrators are able to track things more easily since everything’s in one place.”

Administrators also benefit from robust reporting capabilities on open positions and employment data, enhancing transparency, efficiency, and fairness at the institution. Before Interfolio, Case Western Reserve used spreadsheets to enter and track employment data, but they are now able to streamline this process with a built-in report. “We now just click a few buttons, and we’re able to pull all the data that we need,” said Jacobs. “Overall, implementing Interfolio for faculty recruitment at Case Western Reserve has been really beneficial for our hiring processes.”



Greater efficiency for promotion and tenure workflows

Promotion and tenure workflows occur twice a year at Case Western Reserve University, with the team typically handling around 150 cases annually — each consisting of hundreds of pages of documentation. Before implementing Interfolio, administrators relied on Box for cloud-based document storage and management, which lacked the approval workflows and tracking the team wanted to ensure a smooth, timely process for all stakeholders. “I would have to download every file, get it signed off by every party, and then upload it back to Box every single time,” noted Jacobs. “That was just really inefficient and time-consuming, as you can imagine, and there wasn’t a way to maintain document security.”

Case Western Reserve is currently in its second cycle using RPT, and the benefits are being seen by candidates, review committees, and administrators alike. “Our faculty candidates like the ease of uploading their materials — they’re able to see what those requirements are on the front end. They fulfill the requirements, submit the document, and then their case is submitted,” said Jacobs. “All of those packets are usually 200 or more pages long, so it’s a lot of paperwork. The workflow at each of our schools is nuanced, but packets are generally reviewed by the department faculty, a department chair, a school-level committee, and the dean,” she added. “Then it comes up to the university and gets reviewed by the vice provost, the provost, the president, and the board. So, we have a pretty long workflow.”

The team is able to limit access based on a person’s role at the university, ensuring that each user can only access exactly what they’re meant to throughout the workflow. And since each action is dated and timestamped, the team has greater transparency into what’s happened and when. “It’s so helpful when someone comes to me and says, ‘When was this sent to me?’ and I can confirm it was sent on this date, by this person, at this time,” noted Jacobs.

As cases go through the process, the committees reviewing the submitted documentation appreciate having everything they need in one place, simplifying the review process. “They’re not having to search through a Box folder or a Google Drive folder to find everything,” said Jacobs. Additionally, administrators are able to keep cases moving through the process while customizing the approval workflow down to the department level — a crucial feature when different departments have different needs. “We no longer have to download those packets and get them signed. We can simply approve them within the system, move them forward to the next review step, and that next reviewer will have the option to either send it back — if something is missing — or send it forward.”

“Interfolio has made parts of my job as a Faculty Affairs Administrator a lot easier, a lot less time-consuming, and a lot quicker. I’m able to focus more on things that I didn’t have time to focus on before, including implementing structural and organizational improvements for our office. I really can’t say enough good things about what Interfolio has done for Case Western Reserve’s Faculty Affairs Office.”

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Transforming faculty affairs processes

Since using Interfolio for promotion and tenure proved to be so successful at Case Western Reserve, the team decided to broaden its use to include all of the actions approved by the Provost’s office. This means that the team can now streamline a wide range of processes — faculty appointments, sabbaticals, endowed professorships, emeriti appointments, and more — leveraging Interfolio.

“It’s been a great tool that we’ve been able to expand the use of within two years of implementing it. We’re able to customize all the templates in order to have those actions submitted and approved, which has been so helpful for me,” said Jacobs. “I’m able to keep track of everything in one area — versus having 30 or 40 Box folders that I have to constantly check.”

The transition to Interfolio has transformed faculty affairs processes at Case Western Reserve, delivering a better user experience while saving the team considerable time. “It’s given me back hours of time — maybe even days. It’s tough to put it in a number, but it’s a lot!” she shared. “Interfolio has made parts of my job a lot easier, a lot less time-consuming, and a lot quicker. I’m able to focus more on things that I didn’t have time to focus on before, including implementing structural and organizational improvements for our office. I really can’t say enough good things about what Interfolio has done for Case Western Reserve’s Faculty Affairs Office.”



About Interfolio

Interfolio's innovative Faculty Information System enables academic leaders to achieve strategic success and drive institutional impact. Trusted by more than 425 institutions worldwide, the Faculty Information System streamlines processes for faculty hiring and recruitment, academic appointments and timelines, activity data reporting, and reviews and promotions.

For more information about Interfolio's Faculty Information System, contact us at elsevier.com/products/interfolio/contact-us

