

Case study: University of California, San Diego

Streamlining review processes

Supporting around 43,000 students and 11,000 academics, the University of California, San Diego (UC San Diego) isn't just a large institution — it's essentially a mini city. When it comes to coordinating the various processes and policies for these thousands of academics, all roads lead to one central office: the university's Academic Personnel Services (APS)



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Introduction

In order to streamline academic review processes for both faculty and administrators across 11 academic, professional, and graduate schools as well as eight undergraduate residential colleges, UC San Diego implemented Interfolio Review, Promotion & Tenure (RPT).

“Faculty are reviewed from the point they get here all the way through to when they retire, with two-, three-, or four-year review cycles,” shared Julia Partridge, Director of Academic Advancement and Compensation within APS. “This means that we need a product that can incorporate multiple workflows — year after year, cycle after cycle.”

For additional support, the institution also implemented Interfolio Faculty Activity Reporting (FAR), giving academics the power to create and maintain their CVs while also providing administrative staff with an easy interface to pull reports as needed.

With 11,000 academics, making the shift from paper to technology made these processes a lighter lift for all stakeholders. “Anywhere between 80% and 90%

of our academic population has — or will have — some sort of contact with our implementation of the RPT and the FAR systems,” said Gabriel Lopez, Director of Academic Policy and Family Programs within APS. “So that really speaks to the scale of how we need to leverage these systems.”

Themes discussed:

- Relieving the workload burden on faculty and staff
- Greater transparency across campus
- Support for specialized programs
- Driving quantitative and qualitative impacts

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Julia Partridge

Director of Academic Advancement and Compensation
University of California, San Diego

Relieving the workload burden on faculty and staff

The university was struggling with a homegrown system that was becoming increasingly tough to maintain. As the people who initially created and maintained it transitioned out of their roles, new people coming in were unable to figure out how to make necessary enhancements — and some were resistant to working with the system entirely. “It was becoming really hard to adapt,” said Lopez. “We were dealing with paper processes and not having a centralized source of data, so we were really struggling to keep track of everything.”

“We are always on the lookout for how we can do things better,” added Partridge. “How do we streamline processes? We look at different steps we can take — not just to relieve the burden on the faculty, but also to relieve the burden on staff.” The team converted an array of processes from paper to electronic with Interfolio, making sure that all changes were a value-add for stakeholders rather than just for the sake of reinventing the wheel.

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Partridge noted that faculty appreciate how empowered they are with Interfolio’s offerings at UC San Diego. “We use two different products from Interfolio: RPT for the workflow and FAR as the data repository,” she said. “The data itself is in the FAR system, and the faculty sign off on the report that is generated and gets put into their file, giving them the final say in terms of what data gets put into their academic review file and goes up the line in the process. If there’s something that they don’t want to put in there, then it doesn’t go into the file.” This helps faculty tell their academic story exactly how they want it to be shared in their review file, saving them time in the process.

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Greater transparency across campus

Before implementing RPT, faculty were putting a significant amount of time and effort into preparing their materials and would then have to simply wait to learn the outcome — without any insight during the process, which can take several months. “The most common complaint we heard was, ‘I spent weeks putting this together and gave it to the department, and I have no idea what’s going on,’” shared Lopez. The team launched an initiative to create a transparency dashboard, leveraging data within RPT to offer a centralized location where an academic can sign in, review their profile, and check on their file’s status with just one click. “We’ve been working with the APIs that are part of RPT and are eventually going to utilize some APIs that are also in FAR,” Lopez noted. “Now they can see where their file is, who’s touched it, and how long it’s been sitting in a review step. Our goal is to give faculty full visibility into what is happening with their file and with their career.”

The transparency dashboard benefits administration and faculty alike, quickly giving both sides access to vital information about the process and status. “We found that this provides greater efficiencies — it’s less time that departments have to sit and explain what is happening, and we’ve been able to help academics identify where the holdups are. It also reduces anxiety on the part of the academic, so we’ve really been pushing that transparency,” said Lopez.

The team also created companion dashboards, including an administrative dashboard, as well as a website to show faculty and departments what the standard process is. This helps everyone know what they need to do and when to do it, ensuring processes stay on track. “The administrative dashboard allows department chairs and deans to be able to see where things are in their department,” said Partridge, “so if it’s been with Ad Hoc for two months, they can talk to the Ad Hoc chair and figure out what’s going on and how they can help.” She also expressed the importance of making sure everyone is on the same page when it comes to what to expect during certain processes. “You’d be surprised in terms of how little faculty may know about the review process — even if they’ve been reviewed for many, many years. The companion website helps them better understand what the process is.”

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Director of Academic Policy and Family Programs
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Support for specialized programs

When it comes to data, UC San Diego has a lot to keep track of across its thousands of academics and students, and this data is spread and tracked across many different offices within the institution. “There’s data on teaching, on faculty, on grants — all sorts of different things,” shared Partridge. “If the data exists, our goal is to be able to pull it in from different sources and aggregate it into one place.”

Utilizing APIs, the institution feeds data related to faculty appointments, courses taught, contracts, and grants directly into FAR, creating a central database for all offices on campus that serves the varying needs of different offices.

Interfolio also helps UC San Diego better support all of its schools and colleges, including those with specialized needs. “Different areas of campus may require slightly different biobibs or reports, so we have built templates in FAR for the different areas,” said Partridge. “For example, our Health Sciences school requires an additional section because they need to account for clinical teaching.” Since the Health Sciences school uses its own unique system, the team wanted to ensure the data collected could serve different purposes across campus. With Interfolio, UC San Diego is able to house everything in one place while allowing multiple uses for the data, reducing the chance of errors and eliminating the need for duplicated efforts.

Driving quantitative and qualitative impacts

By streamlining faculty processes with Interfolio, the institution is seeing the savings add up. “In implementing the two systems — FAR and RPT — from our calculations, we have seen savings of about \$1.66 million per year,” shared Lopez. These annual savings are reflected in both administrative and staff time.

“Specifically, we saw overall file preparation decrease from taking 24 hours of administrative time per file to just 2.5 hours per file in RPT,” noted Lopez. “Additionally, for staff time savings, we eliminated the need to create appointment cases, which saved the team about 5 hours per case file. Faculty impact and time-savings are important measures for us as well, and with FAR, we saw an average of 5.5 hours saved per quarter for faculty updating their profile.”

“It’s been a good experience in terms of savings with some of the quantitative impacts,” he added. “And one thing that we absolutely have loved is reducing a lot of our shadow systems.”

The institution is seeing additional impacts from its Interfolio usage, such as:

- An overall improved quality of faculty biobibs by utilizing FAR as a data repository
- Greater faculty satisfaction
- Elimination of bureaucracy in the evaluation process
- Increased accountability by timestamping cases in RPT, making it more apparent if changes were made or if a file is stalled somewhere in the process
- Streamlined approach that reduces the chances of human error or doubled data entry

“We’re launching these initiatives to help our academics do their research and teaching without spending hours and hours having to do administrative work,” said Lopez. “Our goal is to help them do what they do best.”



About Interfolio

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