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Welcome to Activity Insight

Activity Insight is a fully customizable online information management system designed to organize and report on your teaching, research, service, and faith integration activities. APU has adopted Activity Insight for a variety of functions, including the collection of evaluation data for full-time faculty who are seeking extended contracts and rank promotions in the Faculty Evaluation System. The following pages will assist faculty so that they can manage the pages associated with the FES process.

Access Instructions

Go to - home.apu.edu > Faculty Tab > Activity Insight link

Understanding the Layout and Features of Activity Insight

Left Navigational Menu

The left-hand menu in Activity Insight displays at least two main utilities, Manage Activities and Run Reports. You may have other tabs if your Activity Insight Administrator has given you security access to them. This area is the only navigational menu in Activity Insight; the goal is to give the ability to move simply throughout the management system.

Manage Activities:
Add or update information about the activities you accomplish.

Run Reports:
Run reports that have been custom-built for your campus.
Rapid Reports and PasteBoard are covered on pg. 6-7.

Help:
Submit questions about use of the system.
Main Menu

The main menu is set up to facilitate the FES system. It is organized into 5 steps and one additional section titled “My APU information.” Each step is designed to help keep faculty on track throughout the FES year.

<table>
<thead>
<tr>
<th>Step</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Set Your Goals (Due August 31)</td>
</tr>
<tr>
<td>2</td>
<td>Enter Relevant Activities (Due May 31)</td>
</tr>
<tr>
<td>3</td>
<td>View Data (June 15)</td>
</tr>
<tr>
<td>4</td>
<td>Evaluate Performance (Due June 15)</td>
</tr>
<tr>
<td>5</td>
<td>Review Supervisor’s Ratings and Recommendations (Due July 31)</td>
</tr>
<tr>
<td>My APU Information</td>
<td></td>
</tr>
</tbody>
</table>

**Step 1 Set Your Goals (Due August 31)**
- Review Extended Contract Goals
- Set Rank Promotion Goals
- Create Annual APU Goals
- Upload Goals Report for Supervisor Approval

**Step 2 Enter Relevant Activities (Due May 31)**
- EM - Curriculum Design/ Teaching Innovations/ Other
- EM - Student Advising/ Mentoring
- SP - Scholarship/ Research in Progress
- SP - Scholarly Presentations
- SP - Published Works
- SP - Consulting/ Professional Workshops
- SP - Contracts/ Fellowships/ Grants
- SP - Intellectual Property (e.g., copyrights, patents)
- AP - Artistic/ Professional Performances/ Exhibits
- SP - Professional Reviewer of External Scholarly Work
- SL - APU Service and Leadership
- SL - Professional/ Community Service and Leadership
- FI - Faith Integration Activities
- PD - Participation in Professional Development Events
- PD - Acquisition/ Maintenance of Licensures, Certifications

**Step 3 View Data (June 15)**
- Annual IDEA Scores
- Annual Library Classroom Evaluation
- Annual Servant Leader Scores
- Faith Integration Scores (upon contract renewal)

**Step 4 Evaluate Performance (Due June 15)**
- Upload Annual Reports and Faculty Reflection

**Step 5 Review Supervisor’s Ratings and Recommendations (Due July 31)**
- Annual Supervisor Feedback
- Annual Dean Feedback (Optional)

**My APU Information**
- Contact Information
- APU Yearly Data
- Annual Workload Agreement
- Awards and Honors
- Educational Degrees
- Professional Work History
- Professional Memberships
- History of Academic Advancement
- Scheduled Teaching (for School of Business only)
Summary Pages
Most links in Activity Insight will have a Summary Page that summarizes the content contained therein*. To access the summary page, click on the link name.

At the top of each summary page there is instructional text answering three questions: What is this?, Who enters data?, and When is it due?
The functions of Add, Edit/View, Duplicate, and Delete are on this screen. The Search function allows a user to quickly find a record from a long list of records.

An additional action appears on the Published Works screen for data import. This feature enables you to upload a BibTeX file and or search the PubMed database for data import. After clicking on the Import items button, follow the screen prompts.

Saving Data
When working in the system, if you make changes and want to preserve them, you need to click one of the Save buttons at the top of the screen prior to leaving it. “Save + Add Another” is a simple way to add another new blank record without needing to go back to the summary page.

*The “Contact Information” and the “History of Academic Advancement” pages do not have summary pages. The data stored on these pages are considered static and will only need to be updated when it changes.
The PasteBoard
The PasteBoard allows you to copy text from another document, such as your vita in Microsoft Word, and paste it into the PasteBoard. After you have pasted text into the PasteBoard, you can then select text from it, click-and-hold on the text you selected, and drag the text into a field in the system to have it pasted into the field. To access the PasteBoard, click the PasteBoard button located under Manage Activities in the left navigation menu.

Rapid Reports (not recommended)
Rapid Reports is a quick access tool for running reports; unfortunately, this tool isn't customizable, and the default dates and report format cannot be preselected. The use of this tool is not recommended unless you are completely familiar with FES reporting date ranges. For a list of correct date ranges, refer to pg.7.

It is recommended that you run reports by using the “Run Reports” link (pg. 7). Accessing the custom report via this link will ensure proper reporting date ranges.
Run Custom Reports

This utility allows you to run reports that have been custom-built into the system. For any report, follow these steps.

From the left navigational menu, click “Run Reports.”

1. Select from the drop down list the report to run.
2. Date range: Each custom report has a set date range that accumulates the data needed for an FES report. If you need to view more than one FES year, change only the year fields.
3. Select the format type and page size: Adobe PDF and Letter are the defaults.
4. Click Run Report button.

### Date Ranges for the Faculty Evaluation System Reports

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Default Date Ranges</th>
</tr>
</thead>
<tbody>
<tr>
<td>FES 1: Goals and Expectations Report</td>
<td>Sept. 1 to Aug. 31</td>
</tr>
<tr>
<td>FES 2: Activity Report</td>
<td><strong>June 1 to May 31</strong></td>
</tr>
<tr>
<td>FES 3: TES Report</td>
<td>Sept. 1 to Aug. 31</td>
</tr>
<tr>
<td>FES 3a: Library Classroom Evaluation Report</td>
<td>Sept. 1 to Aug. 31</td>
</tr>
<tr>
<td>FES 4: Scoring Summary Report</td>
<td>Sept. 1 to Aug. 31</td>
</tr>
<tr>
<td>FES 5: Annual Supervisor Feedback (optional)</td>
<td>Sept. 1 to Aug. 31</td>
</tr>
<tr>
<td>FES 6: Faith Integration Scores Report (optional)</td>
<td>Sept. 1 to Aug. 31</td>
</tr>
<tr>
<td>FES 7: Teaching Observation Report (optional)</td>
<td>Sept. 1 to Aug. 31</td>
</tr>
<tr>
<td>FES SUP: Faculty List of Completed Activity Reports and Reflections</td>
<td>Sept. 1 to Aug. 31</td>
</tr>
<tr>
<td>FES SUP: Faculty List of Completed Goals and Expectations Report</td>
<td>Sept. 1 to Aug. 31</td>
</tr>
</tbody>
</table>

Note: Choosing date ranges outside of the defaults will result in incorrect reporting.
Using Activity Insight to Navigate the Faculty Evaluation System

The Faculty Evaluation System (FES) is the University-approved advancement system utilized by all full-time faculty to record performance data in order to apply for extended contracts and promotions. Activity Insight serves as the repository for all elements of FES. After you log into Activity Insight, you will see the steps you will need to enter data throughout the FES academic year.

Step 1 Set Your Goals

The FES process begins with faculty entering their extended contract and rank promotion goals. These goals are set for the future; that is, faculty should be aspiring to a future goal that will result after a cycle of data collection. In many cases, extended contract and rank promotion goals will have a common starting and ending point so that a decision may be rendered for both at the same time. In some cases, however, a faculty member may achieve one without the other or may achieve one at a different point in time. Therefore, it is important to maintain accurate records of advancement goals.

Extended Contract Goals are reported on the FES 1: Goals and Expectations Report and the FES: 2 Activity Report.

Reviewing Extended Contract Goals

The data on this web page identifies the faculty member’s extended contract goal information and data collection years, as well as whether the faculty member is exempt from writing a faith integration response paper (FIRP). It is important to understand that data collection years differ from contract years; data collection for extended contract renewal decisions must be completed in the year prior to the year in which a contract expires.

To ensure that the faculty member stays on cycle, the Office of Faculty Evaluation enters this data. Please note that after a first 3-year extended contract is issued, faculty have the right to choose the next contract goal. Please refer to the Faculty Handbook for requirements.

To review this data start by clicking on the link titled “Review Extended Contract Goals;” then click the most recent record (bottom) to review your goal and data collection years.
Setting Rank Promotion Goals

The data on this web page identifies the faculty member’s rank promotion goal information and data collection years. A faculty member who is currently pursuing a rank promotion is required to complete all fields pertaining to the rank goal selected, as well as be familiar with the Faculty Handbook requirements outlined for their selected goal.

To set your rank promotion goal, click on the link titled “Set Rank Promotion Goals,” then click the + Add New Item. Note: if there is already a goal set up, do not create another goal until that existing goal is achieved. If you need to update it, click on the record text and update the record and save.

Completing the Rank Promotion Goal Page

1. Enter year current rank went into effect.
2. Enter eligibility year for next rank promotion. This is the year your next rank promotion would take effect.
3. Select rank promotion goal – this is the promotion towards which a faculty member is aspiring.
4. Verify that the requirements are met for rank promotion – this information can be found in section 7 of the Faculty Handbook.
5. Select the academic years that data will be collected toward achieving rank promotion goal.
   Note: Data collection must be completed one year prior to the year in which a promotion will take effect.
   a. Select the first year of data collection from the drop down list.
   b. Select the second year of data collection from the drop down list.
   c. Select the third year of data collection from the drop down list.
   d. Select the fourth and fifth year of data collection from the drop down list (only if you’re on a 5-year contract).
6. Select the number of peer-reviewed publications needed for the selected rank promotion goal. This number may be higher than University minimums if you are receiving workload units for scholarship.
7. Indicate if you will complete the number of publications by June 30 of the final year of data collection.
8. If seeking a rank promotion to Associate Professor or Professor, choose the Faith Integration project appropriate to the rank promotion goal.
9. Faith Integration Response Paper Due Date - Due June 30 of the year prior to eligibility.
10. Click “Save” (top of page)

See next page for illustration
Edit Set Rank Promotion Goals

- Year current rank went into effect: [ ]
- Eligibility year for next promotion goal (assumes all criteria are met): [ ]

Select Rank Promotion Goal:
- [ ] None
- [ ] Promotion to Assistant Professor
- [ ] Promotion to Associate Professor
- [ ] Promotion to Professor

The initials below signify I have reviewed the Faculty Handbook and agree that I will meet the requirements associated with the rank promotion I am seeking.

Initials (required if seeking a rank promotion goal): [ ]

Data Collection Years

Select the academic years that data will be collected toward achieving your rank promotion goal. Data collection for promotion decisions must be completed in the year prior to the eligibility year identified above.

1st Year: [ ]
2nd Year: [ ]
3rd Year: [ ]
4th Year (5-year contract only): [ ]
5th Year (5-year contract only): [ ]

Publication Requirements

- What is the minimum number of peer-reviewed publications required for your promotion as stated in the Faculty Handbook?: [ ]
- Will you achieve the required number of publications by June 30 of the final year of data collection (identified above)? [ ]

Faith Integration Materials

In addition to the Faith Integration Response Paper, record the Faith Integration project that will be completed for rank promotion to Associate Professor.

Choose from the following Projects
- Option 1: Associate Professor Faith Integration Demonstration Paper
- Option 2: Critical Bibliographic Review
- Option 3: Creative or Scholarly Project and Interpretive Essay I

Faith Integration Project - Associate Professor: [ ]

In addition to the Faith Integration Response Paper, record the Faith Integration project that will be completed for rank promotion to Professor.

Choose from the following Projects
- Option 1: Professor Faith Integration Demonstration Paper
- Option 2: Literature Review
- Option 3: Creative or Scholarly Project and Interpretive Essay II

Faith Integration Project - Professor: [ ]

Given your data collection cycle, select the year in which the faith integration materials will be submitted. For faculty on 1-year contracts faith integration materials are due June 30 after 3 years of data collection. For faculty on extended contract, faith integration materials are due June 30 one year prior to the (eligibility) year identified above.

June 30: [ ]

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Create Annual APU Goals

In addition to extended contract and rank promotion goals, faculty set annual performance goals that will enable them to achieve the extended contract or rank promotion that they desire and to help communicate important elements of their faculty role. The following sections describe this process.

Definitions

Goal-setting is a broad term that is being used interchangeably with "expectations" and is meant to incorporate faculty work, important tasks to meet department needs, and University benchmarks that need to be met for advancement decisions. While faculty may have personal and professional aspirations, department chairs and deans may also have expectations for faculty and may choose to identify additional goals that need to be met in order for a faculty member to advance. University requirements for advancement (e.g., Teaching Effectiveness Score of 50) may also be stated as goals.

Principles of Goal Setting

At least one goal is required in the 3 primary roles (Educator-Mentor (EM), Scholar-Practitioner (SP), and Servant-Leader (SL)), As well as in Faith Integration (FI). Goals may also be set in Professional Development (PD). Goals should not be all-inclusive of faculty work; they should reflect important expectations that will be evaluated at the annual performance appraisal and will impact overall ratings of effectiveness and, ultimately, contract decisions. Some thoughts to consider:

- In all cases, goals should be SMART (specific, measurable, achievable, realistically tied to your job description, and time-delineated).
- For most faculty, broad goals in the 3 roles and in faith integration will be sufficient (e.g., develop a new course, supervise 5 dissertations, write 3 journal articles, and serve on 2 Councils).
- When setting goals, faculty members should incorporate any benchmarks that must be met for the advancement they are seeking. For example, all advancement goals have a minimum average Teaching Effectiveness Score (TES) that must be obtained, so it would be wise to set a goal that identifies that minimum benchmark (e.g., average TES score of 50 or higher). In some cases, departments will have higher goals than University minimums, but departments may not set goals below those set at the University level.
- Other goals may be set as a reflection of department expectations (e.g., contribute one chapter of program review) or personal aspirations (e.g., publish a book).
- A goal may cross multiple years, but annual conversations will occur to ensure that faculty are making appropriate progress toward goal attainment.

Process for Recording Goals

Goals are entered in Activity Insight in Step 1 at the link titled “Create Annual APU Goals” (see the pages that follow for details). Department chairs may ask faculty to record goals in Activity Insight prior to a meeting, or they may choose to set goals as part of a meeting and then have faculty enter them into Activity Insight. Regardless of process, once goals are entered into Activity Insight, faculty generate a custom report FES 1: Goals and Expectations Report, save it to their computers, then upload it back to the link titled “Upload Goals Report for Supervisor Approval” (Step 1 section). Faculty then notify their supervisor that the Goals report is ready for viewing and approval by department chair and dean (if desired). Except for a faculty member’s first year, complete Goal Setting Reports must be uploaded and approved by August 31!
Recording Goals in Activity Insight
Click on the link titled "Create Annual APU Goals" in "Step 1 Set Your Goals" section.

The next page will be what is called the "Summary Page." This page will start out blank but will eventually contain a summary of all the goals you have recorded. At the top of the summary page there is instructional text to clarify process.
Adding a New Goal

To add a new goal click on the “+Add New Item” button.

1. Start by entering the academic year for which the goals apply (required). Usually faculty are setting goals in anticipation of a coming year of data collection.

2. Next choose a Brief Title for your goal or expectation (required). This is the title that will display on the summary page, so choose a label that is clear.

3. Classify the Type of Goal (required)
   - EM - Curriculum Design/ Teaching Innovations/ Other
   - EM - Student Advising/ Mentoring
   - SP - Scholarship/ Research in Progress
   - SP - Scholarly Presentations
   - SP - Published Works
   - SP - Consulting/ Professional Workshops
   - SP – Contracts/ Fellowships/ Grants
   - SP - Intellectual Property (e.g., copyrights, patents)
   - SP - Artistic and Professional Performances/ Exhibits
   - SP - Professional Reviewer of External Scholarly Work
   - SL - APU Service and Leadership
   - SL – Professional/ Community Service and Leadership
   - FI - Faith Integration Activities
   - PD - Participation in Professional Development Events
   - PD - Acquisition / Maintenance of Licensures, Certifications

4. Provide a Brief Description of the goal so that others know what it is (required). This will display in the Goals and Expectations Report.

5. Once you complete this information, click “Save” (if you are finished adding goals) or “Save + Add Another” (if you are adding other goals).
Generate and Upload a FES 1: Goals and Expectations Report

Once an agreed-upon set of goals and expectations has been entered into Activity Insight, the faculty member generates a summary report (called FES 1: Goals and Expectations Report), which is then uploaded as a PDF file back into the faculty member’s account under the web link titled “Upload Goals Report for Supervisor Approval,” in the Step 1 Set your Goals section.

Running FES 1: Goals and Expectations Report

Click on the “Run Reports” link in the navigation menu

1. Select from the drop down list the FES 1: Goals and Expectations Report.
2. Date range: Each custom report has a set date range that accumulates the data needed for an FES report. If you need to view more than one FES year, change only the year fields.
   *The date range for the FES 1: Goals and Expectations Report is Sept 1 to Aug 31*
3. Select the format type and page size: Adobe PDF and Letter are the defaults
4. Click Run Report button. Save the document to a location you can find on your computer.

Uploading FES 1: Goals and Expectations Report

After you have generated and saved a FES 1: Goals and Expectations Report, upload it to the screen under the web link titled “Upload Goals Report for Supervisor Approval,” found under Step 1 Set Your Goals.

STEPS FOR UPLOADING YOUR GOALS REPORT

Click on the link “Upload Goals Report for Supervisor Approval”
To add a new record click on the “+ Add New Item” button.

Note: If there is already an existing record for the academic year, click on the text to edit the record. DO NOT create multiple records for the same academic year.

1. Enter the academic year for which the goals apply.
2. Enter the date that you met with your supervisor to discuss these goals.
3. Upload the FES 1: Goals and Expectations Report you ran earlier.
4. Verify that you (the faculty member) have reviewed the report by selecting “yes” from the drop down list and entering your name and date.
5. Click “Save.” Notify your supervisor via e-mail that the report is ready for their review and approval.
Step 2 Enter Relevant Activities

As the year progresses or prior to one’s annual meeting with a supervisor, faculty will record their activities as evidence of the successful completion of their goals and to record significant accomplishments. This recording may take place as activities are completed (this is recommended) or at the end of an academic year. The following pages identify how to record activities and accomplishments.

Recording Educator-Mentor (EM) Activities

Once you have completed an Educator-Mentor (EM) goal, or as you approach the end of an academic year, you will need to enter the details of your EM activities in the appropriate Educator-Mentor link. For example, if you generated a goal of designing a new course, then you would enter the details in the EM – Curriculum Design/Teaching Innovations/Other link, click on the + Add New Item button at top right, and select Curriculum Design as the type of EM activity. Then you would describe the course that was designed. Ideally, the category you selected in the Goals and Expectations section of your Goals and Expectations Report should match the category you select when recording the completed Educator-Mentor activity. Should you accomplish an Educator-Mentor activity that was not included in your Goals and Expectations Report, you may still record it in the appropriate link.

Be sure to enter a start date and end date for each EM activity you record. If the activity is not yet complete, you may indicate such with the completion status drop-down.

NOTE: To ensure correct reporting in FES, you will need to assign the academic year to which this Educator-Mentor activity applies for FES by selecting the drop down list.

For the link titled “EM - Student Advising/Mentoring,” complete the appropriate fields, including start and end dates. Additionally, to ensure correct reporting in FES, you will need to assign the academic year to which the activity applies for FES.

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Recording Scholar-Practitioner Activities

Once you have completed a scholarship goal, or as you approach the end of an academic year, you will need to enter the details of your Scholar-Practitioner (S-P) activities in the appropriate scholarship link. For example, if you generated a goal of presenting your research at a national conference, then you would enter the details of your conference presentation in the link titled “SP - Scholarly Presentations.” Ideally, the category you selected in the Scholar-Practitioner Goals and Expectations section of your Goals and Expectations Report should match the category you select when recording the completed scholarship. Should you accomplish scholarship that was not included in your Goals and Expectations Report, you may still record it in the appropriate link.

Be sure to enter a start date and end date for each scholarship activity you record. If you have not completed your scholarly product by the end of the academic year, you may leave the end date blank. Until an ending date is selected, the activity will appear in every year’s activity report.

NOTE: To ensure correct reporting in FES, you will need to assign the academic year to which this Scholar-Practitioner activity applies for FES by selecting the drop down list.

Recording Servant-Leader Activities

Once you have completed a service or leadership goal or as you approach the end of the academic year, you will need to enter the details of your Servant-Leader (SL) activities in the appropriate service link. For example, if you indicated you were going to serve on a Council in your Goals and Expectations Report, you would insert the details of your service in the “SL - APU Service and Leadership” link. Ideally, the category you selected in the Servant-Leader Goals and Expectations section of your Goals and Expectations Report should match the scope of service you select when recording the completed service (e.g., Department, School…). Should you engage in service or leadership that was not included in your Goals and Expectations Report, you may still record it in the appropriate link.

For clean and clear reporting, each activity should be a unique record. For example, if a faculty member serves on a council or committee for 2 years, there will be 2 records; one for each year served. These activities are reported on the FES 2:

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Activity Report for the current academic year. If a service or leadership activity is reporting incorrectly, an end date may need to be entered.

NOTE: To ensure correct reporting in FES, you will need to assign the academic year to which this Servant-Leader activity applies for FES by selecting the drop down list.

Recording Faith Integration Activities

Once you have completed a Faith Integration (FI) goal, or as you approach the end of an academic year, you will need to enter the details of your activities in the FI - Faith Integration Activities link. Should you accomplish an activity that was not included in your Goals and Expectations Report, you may still record it in the Faith Integration Activities link.

Be sure to enter a start date and end date for each FI activity you record. If the activity is not yet complete, you may indicate such with the completion status drop-down.

NOTE: To ensure correct reporting in FES, you will need to assign the academic year to which this FI activity applies for FES by selecting the drop down list.

Recording Professional Development Activities

Once you have completed a Professional Development (PD) goal, or as you approach the end of an academic year, you will need to enter the details of your activities in the appropriate professional development link. For example, if you indicated you were going to attend a workshop for continuing education credit, you would insert the details of the workshop in the appropriate link. Ideally, the category you selected in the Professional Development Goals and Expectations section of your Goals and Expectations Report should match the category you select when recording the completed PD activity.

Should you accomplish a professional development activity that was not included in your Goals and Expectations Report, you may still record it in the appropriate link.

For clean and clear reporting, each activity should be a unique record. For example, if a faculty member serves on a council or committee for 2 years, there will be 2 records; one for each year served. These activities are reported on the FES 2:
Activity Report for the current academic year. If a professional development activity is reporting incorrectly, an end date may need to be entered.

NOTE: To ensure correct reporting in FES, you will need to assign the academic year to which this Professional Development activity applies for FES by selecting the drop down list.
Step 3 View Data

Each year faculty will be able to view data from the current academic year, as well as data collected in prior years.

View Individual Class IDEA Scores

IDEA data that is used for FES will be uploaded to the link titled “Annual IDEA Scores.” Faculty will be able to view several different pieces of IDEA data, including the scores that will be utilized for the Teaching Effectiveness Score (TES) computation. More comprehensive report of IDEA results is sent electronically to faculty at the conclusion of each term.
**View Annual Library Classroom Evaluation**

The Office of Faculty evaluation pulls the data from the “Student Evaluation of Instructional Librarians” survey 3 times a year; September (Summer), January (Fall), and May (Spring). The Student responses are averaged for each course and a cumulative average is calculated across all courses.

![View Annual Library Classroom Evaluation](image)

**View Annual Servant Leader Scores**

Each year servant leader collegiality scores will be recorded by the Office of Faculty Evaluation and will be available for viewing in mid-May. To view your peer score, click on the link titled “Annual Servant Leader Score.”

A specific report is not generated for these scores, but scores will appear in the FES 4: Scoring Summary Report, and faculty are expected to view and reflect on them as part of their annual reflection.

**View Faith Integration Scores**

In the final year of data collection, faith integration scores will be posted at the link titled “Faith Integration Scores.” To view the details (reviewers’ scores and rubric), click on the record text or run a FES 6: Faith Integration Scores Report. This report is optional, and it is not uploaded into Activity Insight.

![Faith Integration Scores](image)

**Running a FES 6: Faith Integration Scores Report**

The Faith Integration Scores Report is an optional report and not uploaded to a screen. The report will display the faith integration scores by the reviewers and will contain links to the feedback provided by each reviewer.

Click on the “Run Reports” link in the navigation menu.
1. Select from the drop down list the FES 6: Faith Integration Scores Report (optional).
2. Date range: Each custom report has a set date range that accumulates the data needed for an FES report. If you need to view more than one FES year, change only the year fields.
   *Note: The date range for the FES 6: Faith Integration Scores Report (optional) is Sept 1 to Aug 31*
3. Choose file format and type (optional)
4. Click Run Report button.

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**Step 4 Evaluate Performance**

At the end of the traditional spring semester and prior to meeting with their supervisor for a performance review, faculty should ensure that all data is collected in Activity Insight, that appropriate reports are generated and uploaded, and that faculty have engaged in personal reflection about their accomplishments in each of the roles and faith integration.

**Generate Annual Reports**

The following are instructions on how to generate the two annual reports needed.

**Running FES 2: Activity Report**

Click on the “Run Reports” link in the navigation menu

1. Select from the drop down list the FES 2: Activity Report.
   *Date range: Each custom report has a set date range that accumulates the data needed for an FES report.
   *The date range for the FES 2: Activity is Jun 1 to May 31*
   *The format type and page size are preset, you do not have to adjust these.
   *Adobe PDF and Letter are the defaults*
2. Click Run Report button. Save the document to a location you can find on your computer.
Running FES 3: TES Report

Click on the “Run Reports” link in the navigation menu

1. Select from the drop down list the FES 3: TES Report.
   Date range: Each custom report has a set date range that accumulates the data needed for an FES report. If you need to view more than one FES year, change only the year fields.
   *The date range for the FES 3: TES Report is Sept 1 to Aug 31*
   The format type and page size are preset, you do not have to adjust these.
   *Adobe PDF and Letter are the defaults*

2. Click Run Report button. Save the document to a location you can find on your computer.

### Run Reports Table

<table>
<thead>
<tr>
<th>Report</th>
<th>Date Range</th>
<th>File Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>FES 3: TES Report</td>
<td>Sep 01 2015 to Aug 31 2016</td>
<td>PDF, Letter</td>
</tr>
</tbody>
</table>

*Date range is set for current cycle, no adjustments needed if running reports for current cycle.*

*These two fields are preset*
Steps for Uploading Reports and Entering Reflections

Click on the link “Upload Annual Reports and Faculty Reflection” found under the Step 4 heading.

Add a new item only if there is no existing report for the current year. If there is an existing report for the current year, edit the record by clicking on the record text.

Entering the Details for the Upload Annual Reports and Faculty Reflection Page

1. Enter the academic year for which the activities apply and upon which you are reflecting.
2. Enter the Teaching Effectiveness Score for the same academic year; this score is found on the FES 3: TES Report. For assistance click on the (?) icon for instructions on how to run the reports. Don't forget to save them to your computer.
3. Click the first “Choose File” link to upload the saved FES 3: TES Report. Library Faculty should upload their FES 3a: Library Classroom Evaluation Report to the second “Choose File” link.
4. Enter your reflections on your teaching scores and other elements of teaching.
5. Click the “Choose File” button to upload the saved FES 2: Activity Report document.

6. Entering Reflection Narrative
   After you’ve reviewed your activity report, classroom teaching scores, and peer collegiality data, reflect on your performance in each of the 3 roles, as well as your performance related to goals set in faith integration or professional development. Keep in mind that this reflection will be read by your chair, dean, and when relevant, TTRP members.

7. Enter the date you completed your reflection.

8. Click “Save” button at top of page. Send an email to your chair or dean indicating you are ready for your performance review meeting.
Step 5 Review Supervisor's Ratings and Recommendations

After faculty have met with their supervisor to review their performance and to set goals for the next year, supervisors will enter their summary ratings and narrative feedback at the link titled “Annual Supervisor Feedback.” Below is an example of the Summary Page. To see what has been entered, click on the record text.

After you have clicked the record text, you will see the ratings and comments provided by your primary supervisor. The highlighted areas identified in the screen capture to the left are the fields that will be completed by your supervisor.
Annual Dean Feedback (optional)
The “Annual Dean Feedback” screen is similar to the “Annual Supervisor Feedback” screen, except the comments will be entered by your Dean, should your Dean desire to do so.

If the Dean is the direct supervisor of a faculty member (e.g., a department chair), the Dean will provide feedback at the “Annual Supervisor Feedback” link.

My APU Information

The My APU Information section is a group of pages that need to be reviewed and updated for accuracy.

The following pages are to be updated annually by faculty for correct reporting.

- APU Yearly Data
- Scheduled Teaching (School of Business only)

The following pages need to be filled out initially by faculty, and then updated as needed.

- Contact Information
- Awards and Honors
- Educational Degrees
- Professional Work History
- Professional Memberships
- History of Academic Advancement

The following page is completed by an other area. If you find inaccurate information contact the area listed below.

- Annual Workload Agreement - for corrections or changes contact your school administration
Running Additional Reports

FES 4: Scoring Summary Report
The Scoring Summary Report is a report that includes a summary of all of the evaluation scores, reflections, and ratings. Faculty or supervisors are encouraged to run this report before the annual performance review; however, it will be most valuable in the final year of data collection after faith integration scores have been generated.

The Scoring Summary Report will be utilized by the supervisor, Dean and, when appropriate, the Term Tenure and Rank Promotion Committee, to generate an extended contract and rank promotion recommendation.

1. Select from the drop down list the FES 4: Scoring Summary Report.
2. Date range: Each custom report has a set date range that accumulates the data needed for an FES report. If you need to view more than one FES year, change only the year fields. The date range for the FES 4: Scoring Summary Report is Sept 1 to Aug 31.
3. Select the format type and page size: Adobe PDF and Letter are the defaults.
4. Click Run Report button.

FES 5: Annual Supervisor Feedback and Evaluation of Faculty Report
The Annual Supervisor Feedback and Evaluation of Faculty Report is an optional report and not uploaded to a screen. The information in this report will also display in the FES 4: Scoring Summary Report along with all of the final data, but if faculty wish to see supervisor comments in a stand-alone document, they can do so with this report.

1. Select from the drop down list the FES 5: Annual Supervisor Feedback and Evaluation of Faculty (optional).
2. Date range: Each custom report has a set date range that accumulates the data needed for an FES report. If you need to view more than one FES year, change only the year fields. The date range for the FES 5: Annual Supervisor Feedback and Evaluation of Faculty Report (optional) is Sept 1 to Aug 31.
3. Select the format type and page size: Adobe PDF and Letter are the defaults.
4. Click Run Report button.
<table>
<thead>
<tr>
<th>Title of Report</th>
<th>Description of Report</th>
<th>Who Can Generate the Report</th>
<th>Date Report is Typically Drawn</th>
</tr>
</thead>
</table>
| **FES 1**: Goals and Expectations Report | **Description**: This report, completed annually, documents all of the goals recorded by the faculty member. These goals include:  
- Extended Contract Goals  
- Promotion Goals  
- Educator-Mentor Goals  
- Scholar–Practitioner Goals  
- Servant–Leader Goals  
- Professional Development Goals  
- Faith Integration Goals | All FES users | June 1 or later, prior to meeting with supervisor; New faculty will generate in September |
<p>| <strong>Use</strong>: The report facilitates conversations with a supervisor about expected performance. Additional goals and expectations may be suggested by your Chair or Dean as part of the annual meeting. At the conclusion of the academic year, this report can serve as a reference point for the completion of faculty activity reports and faculty reflection on progress toward goal completion. |  |
| <strong>This report is uploaded to Al page</strong>: “Annual Supervisor Approval of Goals and Expectations” |  |
| <strong>Default Date Range</strong>: Sept. 1 – Aug. 31 |  |
| <strong>FES 2</strong>: Activity Report | <strong>Description</strong>: This report, completed annually, documents all of the activity recorded by the faculty member in Educator-Mentor, Scholar–Practitioner, Servant–Leader, Professional Development, and Faith Integration. | All FES users | June 1 or later, prior to meeting with supervisor |
| <strong>Use</strong>: This report is used to document faculty performance and facilitates faculty reflection on their progress toward achieving goals. The report also assists supervisors in evaluating faculty progress toward achieving goals and meeting expectations. |  |
| <strong>This report is uploaded to Al page</strong>: “Annual Reports and Faculty Reflection” |  |
| <strong>Default Date Range</strong>: June 1 – May 31 |  |
| <strong>FES 3</strong>: TES Report | <strong>Description</strong>: This report documents and averages IDEA scores for a given academic year in order to calculate a Teaching Effectiveness Score (TES). | All FES users | June 1 or later, prior to meeting with supervisor |
| <strong>Use</strong>: This report is used to examine student feedback about quality of teaching and to determine whether minimum University benchmarks have been met for a faculty member’s stated advancement goal. |  |
| <strong>This report is uploaded to Al page</strong>: “Annual Reports and Faculty Reflection” |  |
| <strong>Default Date Range</strong>: Sept. 1 – Aug. 31 |  |</p>
<table>
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</tr>
</thead>
<tbody>
<tr>
<td>FES 3a: Library Classroom Evaluation Report</td>
<td><strong>Description:</strong> This report records the annual student evaluations of library faculty guest teaching received for each academic year. <strong>Use:</strong> This report is used to determine teaching effectiveness among library faculty. <strong>This report is uploaded to AI page:</strong> “Annual Reports and Faculty Reflection”</td>
<td>All FES users</td>
<td>June 1 or later, prior to meeting with supervisor</td>
</tr>
<tr>
<td></td>
<td><strong>Default Date Range:</strong> Sept. 1 – Aug. 31</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FES 4: Scoring Summary Report</td>
<td><strong>Description:</strong> This report captures all cumulative data for the faculty member. It summarizes, by academic year, all activities, scores, ratings, faculty reflection, and supervisor/Dean feedback for a requested time period. In a final year of data collection, this report will also capture faith integration scores. <strong>Use:</strong> Supervisors will review this report annually to ensure faculty are meeting expected requirements. Additionally supervisors are responsible for uploading a final multi-year version of this report for their faculty members who are seeking an extended contract and/or a rank promotion. <strong>This report is uploaded to AI page(s):</strong> “Extended Contract Recommendation” and/or “Rank Promotion Recommendation” at the completion of a 3 or 5-year data collection cycle and prior to contract recommendation. This report is not typically uploaded on an annual basis.</td>
<td>All FES users</td>
<td>Oct. 30 in the year prior to contract expiration, before contract recommendations are made</td>
</tr>
<tr>
<td></td>
<td><strong>Default Date Range:</strong> Sept. 1 – Aug. 31</td>
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<tr>
<td>FES 5: Annual Supervisor Feedback (optional)</td>
<td><strong>Description:</strong> This optional report records the supervisor’s effectiveness ratings for each of the three roles (Educator-Mentor, Scholar-Practitioner, Servant-Leader and Faith Integration) as well as any narrative feedback given by the supervisor about faculty performance. The information in this report also appears in the FES 4: Scoring Summary Report (see below). <strong>Use:</strong> This report is used to capture supervisor feedback in a document. <strong>This report is not currently uploaded into AI because information is captured in the Scoring Summary Report.</strong></td>
<td>All FES users</td>
<td>As needed after Aug. 30</td>
</tr>
<tr>
<td></td>
<td><strong>Default Date Range:</strong> Sept. 1 – Aug. 31</td>
<td></td>
<td></td>
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<tr>
<td>FES 6: Faith Integration Scores Report</td>
<td><strong>Description:</strong> This optional report displays the faith integrations scores and provides an embedded link to reviewer comments. <strong>Use:</strong> While not required, this report puts information related to a faculty member’s faith integration proficiency into a document.</td>
<td>All FES users</td>
<td>As needed after October 15</td>
</tr>
<tr>
<td></td>
<td><strong>Default Date Range:</strong> Sept. 1 – Aug. 31</td>
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<td></td>
</tr>
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<td>Who Can Generate the Report</td>
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<tr>
<td>-----------------------------------------------------</td>
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</tbody>
</table>
| FES SUP: Faculty List of Completed Goals and Expectations Reports | **Description:** This report provides a status update on the completed goals and expectations reports that should be uploaded for supervisor approval each year.  
**Use:** This report assists FES supervisors in managing the approval of goals and expectation reports on an annual basis by identifying who has not completed a report to be approved. | FES Supervisors or OFE | As needed                        |
|                                                     | **Default Date Range:** Sept. 1 – Aug. 31                                               |                            |                                 |
| FES SUP: Faculty List of Completed Activity Reports and Reflections | **Description:** This report provides a status update on the completed activity reports and faculty reflection on performance that should be uploaded for supervisor review each year.  
**Use:** This report assists FES supervisors in managing the evaluation of faculty on an annual basis by identifying who has not completed an activity report or reflection. | FES Supervisors or OFE | As needed after June 1           |
|                                                     | **Default Date Range:** Sept. 1 – Aug. 31                                               |                            |                                 |
| Extended Contract/ Rank Promotion Recommendation Reports | **Description:** These reports summarize extended contract and/or rank promotion recommendations made for an individual and can be grouped by department, school, or other academic unit.  
**Use:** This report is used by the Office of the Provost to review contract recommendations for the issuance of contracts. | Deans, OFE, Office of Provost | After February 1                 |
|                                                     | **Default Date Range:** Sept. 1 – Aug. 31                                               |                            |                                 |

**Need Assistance?**

Contact the Office of Faculty Evaluation – Extension 5929 or facultyevaluation@apu.edu