Activity Insight User Guide for Supervisors
Provided by the Center for Teaching, Learning, and Assessment
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The Faculty Evaluation System (FES) depends largely on the ability of the department chair (or other supervisor) and dean to monitor faculty participation and to maintain a schedule of annual review.

The following pages are designed to help supervisors with the logistical details of assigning scores and approving documents via Activity Insight. This manual is specific to the role of a supervisor and should be read as a supplement to the Basic User Manual.

Manage Data Screens

In Activity Insight there are screens that are called Manage Data screens. These screens were built for chairs, Deans, supervisors, and administrative users to approve goal-setting reports, enter workload and evaluative data about their faculty, and submit contract recommendations. With the exception of the contract and rank promotion recommendation screens, faculty can see the data that has been submitted but cannot edit most fields. The following screens in Activity Insight are “manage data” screens:

<table>
<thead>
<tr>
<th>Web Screen</th>
<th>Faculty, Dean, or Designate</th>
<th>Chair, Supervisors</th>
<th>OFE</th>
<th>OFI</th>
<th>Uploaded data</th>
</tr>
</thead>
<tbody>
<tr>
<td>APU Historical Data</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual Workload Agreement*</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X^1</td>
<td></td>
</tr>
<tr>
<td>Annual Supervisor Approval of Goals and Expectations*</td>
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<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual IDEA Scores</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual Library Classroom Evaluation</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td>X^2</td>
</tr>
<tr>
<td>Annual Servant Leader Scores</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual Supervisor Feedback and Evaluation of Faculty</td>
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<td>X</td>
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<tr>
<td>Annual Dean Feedback and Evaluation of Faculty</td>
<td>X^3</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Record Faith Integration Scores</td>
<td></td>
<td></td>
<td></td>
<td>X^2</td>
<td></td>
</tr>
<tr>
<td>Extended Contract Recommendation</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Rank Promotion Recommendation</td>
<td></td>
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<td></td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>

*These screens have fields that are Manage Data user and have elements requiring faculty data input on the same page.

1 If your school needs additional help in inputting these agreements, OFE will assist
2 Primary responsibilities for this screen are assigned to OFI; OFE will assist if needed
3 If Dean is direct supervisor, ratings will be recorded in the “Annual Supervisor Feedback and Evaluation of Faculty” page

Role Assignments

Role assignments (e.g., department chair) are based on leadership position. If you find that you do not have access to a user for whom you need to manage data, contact the Faculty Evaluation Coordinator in the Office of Faculty Evaluation at facultyevaluation@apu.edu and request access. Staff access will be granted with email approval from Dean.
Manage Data for Other Users

In Activity Insight, supervisors will need access to view the materials of the people they supervise. This is accomplished through the Manage Data link. To access a faculty member's account, choose the Manage Data menu item on the left navigation menu. From there you will be taken to a screen where you can select the user you want to manage.

Manage Data - Selecting a Faculty Member’s Account

1. Select or type the faculty member’s name to manage.
2. After you have selected the user, click the Continue button.

Note: The drop down will only have the users you have been given permission to manage. If you need to manage the data of a user who is not in the drop down menu list, contact Faculty Evaluation facultyevaluation@apu.edu to request access.

After you have selected a faculty's name to manage data you will see their name at the top of page in red.

TIP: While you are managing another user’s data, do not click on the left navigational menu. If you do, you will turn off the manage data function for that user, and you will need to reestablish manage data for that user again.
Approving Goals Report

After meeting with supervisors in May or June to discuss their goals and expectations, each faculty member will generate a Goals and Expectations Report and upload it to the link found in step 1 titled “Upload Goals Report for Supervisor Approval.” Supervisors should review and approve faculty goals no later than August 30.

The Upload Goals Report for Supervisor Approval screen is broken into 3 sections, Faculty section (at top), Chair or Direct Supervisor Section (middle), and Dean Section (bottom).

Faculty Section - The faculty member will complete the top section and upload the report. Once completed, they will contact their primary supervisor via email.

Chair or Direct Supervisor Section - In manage data function, the primary supervisor will approve the Goals Report by completing the section for Chair or Direct Supervisor approval. Supervisors have the option of adding comments as needed. Faculty will be able to view comments.

Dean Section - If the secondary supervisor wishes to be involved, he or she will approve the Goals Report by completing the section for Dean approval. Similarly, Deans have the option to include comments here as well.
Steps for Approval of Goals Report

After you have clicked on the **Upload Goals Report for Supervisor Approval** link, you will be taken to the summary screen for that area.

1. Click on the academic year that needs approval. In the example below it is 2016-2017.

   ![Upload Goals Report for Supervisor Approval](image)

2. Click on the uploaded file link to view the file.

   ![Edit Upload Goals Report for Supervisor Approval](image)

3. After you have reviewed the goals report, enter the supervisor approval by completing the chair section of the screen and saving the record. If the goal report needing approval is a department chair, the dean or other supervisor uses the chair approval section.
NOTE: If at any point a supervisor wishes for changes to be made to a report, the faculty member must delete the stored file, adjust the goals accordingly, and re-submit (upload) the report.

**Example of Summary Screen Views - Upload Goals Report for Supervisor Approval**

Once an action is taken on the **Upload Goals Report for Supervisor Approval** page, the action will be summarized on the summary screen.

**View 1:** The faculty member has uploaded a report or elements of a report for 2010-2011, but it has not been approved.

**View 2:** The faculty member has reviewed, and the supervisor has approved the Goals Report.
View 3: The faculty member has reviewed, and the supervisor and Dean have approved the Goals Report.
Annual Supervisor Feedback and Evaluation of Faculty

Each June or July, as part of the performance appraisal, department chairs (or Deans if the faculty member being evaluated is a department chair) will provide evaluative feedback and submit an overall rating of effectiveness in Educator-Mentor, Scholar-Practitioner, Servant-Leader, and Faith Integration. These ratings should be a reflection of how well the faculty member met the agreed-upon goals set forth in the goals meeting of the prior year, as well as whether the faculty member met University benchmarks associated with the advancement goal. Ratings should be submitted no later than July 30 each year.

View Faculty Data
The best way to review faculty performance from a given academic year is to run the FES 4: Scoring Summary Report for that user. The Scoring Summary Report will provide all summary data. When multiple academic years are included, data is sorted by each section and will also display a multi-year, cumulative average when appropriate.

The report includes the following data:

**Supervisor’s Rating and Feedback**
Once submitted, the supervisor’s comments and ratings will appear in this report.

**Faculty Reflection**
Faculty are expected to reflect on their performance in the primary roles. Their narrative will be included. There will be a link to the Activity Report, enabling the supervisor to determine faculty activity in all of the roles.

**Student Feedback About Teaching**
For faculty using IDEA, the report will identify the average annual scores for Progress on Relevant Objectives, Overall Excellence of the Teacher, and a Teaching Effectiveness Score (TES), which represents the annual average of the two aforementioned scores.

For library faculty, the report will identify the average score on the library classroom evaluation form.

**Observation of Teaching**
If the faculty member elected to utilize classroom observation, the report will include any completed rubrics and evaluative comments submitted by the observer(s).

**Peer Feedback**
The report will display the annual grouped average from the Department Member Collegiality Survey (SL2).

**Faith Integration Scores**
Once faith integration materials have been submitted and scored, scores will display in this report.

After supervisors have reviewed the Scoring Summary Report, they can enter ratings and feedback for the faculty member, as identified on the following page.

Running a Scoring Summary Report
Click on the “Run Custom Reports” link in the navigation menu.
1. **Report:**
Select from the drop down list the "**FES 4: Scoring Summary Report**."

![Run Reports](image)

2. **Date range:**
Each custom report has a set date range that accumulates the data needed for an FES report. This report can be viewed annually and/or across multiple academic years; make sure to select the correct starting and ending years. The default month and day for the FES 4: Scoring Summary Report is Sept 1 to Aug 3. Please don’t modify these dates.

![Date Range](image)

3. **Whom to include.** If you would like to run the same report for the entire unit, leave this set to "All." If not, click the link that says "**Change selection...**," and a pop-up window will appear.

![Whom to Include](image)

Choose the **Individual** link to find the faculty member’s name and select the check box next to it; then click save.
After you have selected the faculty member’s name, the report builder should look like below.

3. **Whom to Include**
   Users Selected by: individual (1) [Change selection...]
   Include These Accounts: Enabled Only

4. **File Format type**: Adobe PDF and Letter

5. Click **Run Report** button and save the report to your computer.

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**Steps to Provide Annual Feedback**

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After supervisors have reviewed the faculty member’s performance, they should provide feedback and ratings in the 3 roles and faith integration. To do this turn on data management for the user being evaluated and click on the “Annual Supervisor Feedback” link under Step 5 Review Supervisor’s Ratings and Recommendations section.

Click the Add New Item button.

A. Fill in the academic year being evaluated, supervisor name (first and last) and position, and date of performance review meeting.

B. Rate the faculty member’s performance in each of the roles and in faith integration using the drop down list.

C. Please provide detailed feedback about the faculty member’s overall performance in all 3 roles and in faith integration (and professional development as appropriate). Include expectations for future performance. **NOTE:** Four text fields and the submission date are required on this screen.
When you are finished, click the “Save” button. Faculty will be able to view ratings and comments after saving.

**Annual Dean Feedback (Optional)**

There is also a link for Deans to provide general feedback to faculty about their annual performance, but it does not involve the issuance of ratings in the 3 roles and faith integration. This link is **NOT** used when the faculty member being evaluated is a department chair. Instead, Deans will use the process identified in this section titled "Steps to Provide Annual Feedback" when rating their department chairs in the 3 roles and faith integration. If Deans wish to submit feedback using this link, they need to utilize the **Manage Data** function before clicking on the link titled “**Annual Dean Feedback (Optional)**.”

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**Need Assistance?**

Contact the Office of Faculty Evaluation facultyevaluation@apu.edu