



Leveraging Faculty Data Management Systems to Address Workload Inequity

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Abstract: Universities increasingly use faculty data management systems to facilitate the completion and submission of annual reviews and promotion/tenure dossiers. A key feature of many platforms is the documentation of work activities that can be used for faculty evaluation or accreditation. This case study used O'Meara et al.'s (2022) Equity-Minded Faculty Workload framework to customize the faculty data management system *Interfolio*. The project team developed tailored "Faculty Activity Reporting" fields focused on capturing typical forms of faculty work and other invisible forms of service. The intentional customization of the activity reporting suite supports institutional efforts to make faculty workload more transparent and increase recognition and credit of invisible service disproportionately engaged by women and underrepresented faculty. This article provides practical insights into adopting and customizing a faculty data management software with an eye toward fostering equity-minded workload and summarizes preliminary data evaluating group differences in faculty service activities captured in Interfolio.

Keywords: faculty data management systems; workload equity; service load; invisible service; Interfolio

Universities and colleges engage in significant record-keeping to evaluate academic faculty's annual performance, tenure, and promotion. Many institutions—especially those with a high number of faculty—elect to adopt or build data information management software systems that centralize and streamline the process of tracking faculty information related to review, promotion, tenure, merit, and even accreditation (Fossen et al., 2021; Holmes et al., 2017; Khoury et al., 2011; Sen et al., 2017; Vinsonhaler et al., 1995). These systems considerably reduce workload by automating many time-intensive processes related to performance evaluation and workflow approval while also ensuring confidentiality by modifying access for faculty and administrators at various stages of the review.

Some systems offer additional functionality that allows faculty to document work activities in the areas of teaching, scholarship, and service to reduce their time spent completing annual performance evaluations. Systems that have the ability to track faculty work activities present administrators with new opportunities to engage in efforts related to workload equity. With an increased understanding of how faculty spend their time, administrators will be better positioned to support equitable workload distribution. Activity data can be exported to analyze workload distribution by gender, race, rank, and other relevant variables. Making workload distribution transparent is foundational in addressing inequitable practices and informing policy revisions at the university, college/school, and department levels. This paper presents a case study illustrating how one institution used an equity-minded lens to customize the faculty data management system Interfolio, which included measuring forms of invisible service and evaluating whether service differences exist across faculty.

Equity-Minded Faculty Workload

Faculty workload typically includes activities under the broad headings of teaching, scholarship, and service. Workload effort in these categories is weighed differently based on institution type and faculty rank. While an institution can explicate

the expected amount of effort in each of these categories, actual workload distribution is a complex process involving multiple stakeholders, institutional needs, campus priorities, in addition to varying policies and practices. As a result, the distribution of faculty labor can be uneven, especially in the areas of teaching and service. For example, a dean or department chair typically has full discretion for course scheduling and teaching assignments. Supervisors may assign faculty courses and teaching times based on departmental needs, students' preferred timeslots, faculty availability, or even faculty seniority. Service assignments, on the other hand, are harder to track because faculty receive and accept institutional and external service requests, which may not be reported until completing their annual review. Thus, deans and department chairs lack knowledge of faculty service assignments and may indiscriminately assign service to faculty who are visibly present on campus—what O'Meara et al. (2022) coined “the hallway ask.” These typical work distribution practices “show important yet overlooked areas where inequity manifests in academe” (O'Meara et al., 2022, p. iv).

Considerable research demonstrates that women and underrepresented minority (URM) faculty disproportionately engage in work that is “invisible and unrewarded” which further compromises their “productivity, career advancement, and retention” (O'Meara et al., 2022, p. 1). Visible service is work that can be easily identified, contextualized, and included in one's annual reviews (e.g., chairing a committee or a task force). In contrast, invisible service is less easily codified into one's annual reviews or, when included, is weighted less in evaluations for tenure, promotion, merit, or other rewards. Examples include engaging in “emotional labor” or other “care work” related to teaching and mentoring (e.g., student meetings, writing letters of recommendation, commenting on application drafts, and providing psychosocial support).

Multiple studies have documented that women and URM faculty experience a heavier service burden, especially invisible service, compared to male faculty (Guarino & Borden, 2017; Hanasono et al., 2019; Jimenez et al., 2019; O'Meara et al., 2017; Padilla, 1994). Furthermore, women and URM faculty are more likely than

white men to be asked to do non-promotable tasks such as institutional service or advising students (Babcock et al., 2017; O'Meara et al., 2017) or to be asked a second time after declining a service request (O'Meara et al., 2021; Pyke, 2011). Women and URM faculty may also feel pressured to say yes to service requests due to societal expectations related to gender, race, or cultural background (Pyke, 2011). A wide body of research highlights that women and URM faculty often participate in less visible forms of service that typically go undocumented and unrecognized in annual review evaluations or promotion dossiers. The intentional customization of a faculty data management system can support institutional efforts to foster equity-minded workload, increasing recognition and credit for invisible service disproportionately performed by women and underrepresented faculty.

Challenge: Making Workload Transparent

Equity-minded workload advocates argue that the first step to addressing workload inequity is to bring transparency to what activities faculty are doing and how workload activities are assigned and distributed (O'Meara et al., 2022). O'Meara and colleagues suggest using workload activity dashboards to visualize the amount and type of teaching and service each faculty member engages in to make faculty work transparent. For example, O'Meara et al. (2022) have suggested that chairs or supervisors could increase transparency by using Microsoft Excel or other spreadsheet programs to manually track the workload activities of each faculty member in the department.

However, there are significant challenges to collecting, summarizing, and sharing this type of faculty data, especially if an institution does not solicit work activities via a faculty data management system. Faculty typically only report work activities and effort during the annual review process. Institutions without data management systems require faculty to submit written narratives summarizing their work in addition to a curriculum vitae (CV) that highlights activities with the greatest promotability (e.g., publications, grants, awards). Supervisors would have to manually count, enter, and summarize various forms of activities in a spreadsheet to share the

results within or across departments to evaluate faculty workload distribution. Even if supervisors were willing to comb through faculty CVs manually, many faculty do not document advising, mentoring, or other care work on their CVs or annual review materials. Thus, these forms of service continue to go unmeasured and uncredited, and the inequity persists.

Some institutions have attempted to establish institutional workload dashboards but have encountered challenges because the process requires digital infrastructure, coordination across multiple divisions, documentation practices, and data analysis. For example, the University of Denver established a workload equity task force to develop recommendations to support workload equity at their institution. One recommendation included developing a workload dashboard; however, the task force highlighted several problems, including difficulties with documenting workload data, requiring faculty to input their efforts regularly, and building a system that is a repository for the data and simultaneously has reporting and analytical capabilities (University of Denver, 2022, p. 21). The University of Denver task force ultimately deemed their homegrown system as “non-dynamic, non-centralized” and that “data [was] not easily shareable” (University of Denver, 2022, p. 21). Despite the known challenges of collecting and summarizing faculty work activities, there has been little documented in the scholarly literature about best practices in adopting and implementing faculty data management software systems, and a particular lack of data supporting workload analysis strategies.

Possible Solution: Faculty Data Management Systems

Numerous companies have developed data management systems to document and visualize various elements of faculty information (see Table 1). Typically, these proprietary systems offer a host of modular suites that an institution can purchase to complete different functions for data management (e.g., evaluation workflow approval; publications summary; curriculum proposals). For example, the Interfolio product offers multiple suites for purchase, including faculty search (recruitment and hiring), lifecycle management (tracking faculty career progression),

activity reporting (tracking faculty teaching, scholarship, and service), review, promotion, and tenure (faculty evaluation and approval), a dossier service (job search and applications), and a web profile (publishing CV data). Interfolio also offers paid extras that enhance the faculty activity reporting suite. The Interfolio optional data service scrapes internet sources like Google Scholar for faculty publications, allowing faculty members to review, validate, and automatically add citations to their scholarship activity. Work activities collected in the faculty activity reporting suite can be summarized in reports, exported to a data warehouse, or populated into Interfolio's standardized web profile that mirrors a dynamic online CV.

Table 1

Sample Faculty Data Management Systems

Company Name	Product Website
Academ by RimaOne	https://rimaone.com
Academic Analytics	https://academicanalytics.com
Interfolio by Elsevier	https://www.interfolio.com
Lyterati	https://www.lyterati.com
Mountainpass	https://gomountainpass.com
Scholarly	https://scholarlysoftware.com
Watermark	https://www.watermarkinsights.com/solutions/faculty-success

Institutions interested in conducting workload analysis should select a product that includes some form of activity reporting. Activity reporting products may provide a combination of pre-developed data fields as a starting point (e.g., workload percentage, courses taught, scholarly publications) as well as the ability to add new, fully customizable fields (e.g., textboxes for narratives, dropdown lists, check boxes). Interfolio, for example, provides both hard-coded sections that have limited customization (e.g., courses taught, scholarly contributions and creative productions, grant activity) as well as other common activity sections that are fully customizable (e.g., professional development, external service) or can be built to the institution's

needs (e.g., student research supervision). Administrators can use faculty activity reporting for various institutional purposes, including faculty annual reviews or tenure and promotion, accreditation or grant reporting, populating dynamic faculty CVs, and workload analysis.

The institution discussed in this case study chose to adopt the faculty data management system Interfolio to help meet the objectives of a National Science Foundation (NSF) ADVANCE award (#2204389) to improve workload equity among women and URM faculty at the institution. A core objective of the grant was to begin quantitatively tracking faculty activities to address dissatisfaction with service, teaching loads, and lack of recognition or rewards among women and URM faculty. The principal investigators (first two co-authors) and the grant-funded faculty affairs administrator (last co-author) constituted the Interfolio buildout and implementation team. This case study reviews practical considerations for implementation and preliminary data demonstrating an equity-minded approach to document and summarize faculty service activities.

Case Study

Institutional Context

Established in 2002, Nevada State University (NS) is a relatively young, public regional comprehensive university with multiple minority-serving institution designations. NS is a primarily undergraduate teaching institution where faculty have very high teaching loads of four courses per semester (12 units). In addition to demonstrating teaching excellence, faculty are required to engage in scholarship that results in peer-reviewed publications or juried creative works, such as the scholarship of teaching and learning. The number of full-time faculty is relatively small ($n = 133$), for the approximately 4,000 degree-seeking undergraduate students enrolled. In terms of faculty rank, the majority of NS full-time faculty are lecturers (43%) or tenure-track faculty (31%) compared to tenured faculty (27%). NS faculty are housed

within one of three academic Schools—(1) Education ($n = 20$), (2) Nursing ($n = 35$), and (3) Liberal Arts, Sciences, and Business ($n = 74$)—and the Library ($n = 4$).

Before adopting Interfolio, NS faculty completed their annual reviews using electronic Word documents that included summary tables and written narratives to illustrate their teaching, scholarship, and service activities for the calendar year. Upon completing an annual review, faculty emailed their evaluator (e.g., chair or dean) the electronic document and any links to cloud-based folders containing artifacts of teaching effectiveness or evidence of scholarship or service. Mid-tenure reviews and promotion and tenure evaluations followed similar processes with electronic documents and cloud-based file folders. Both processes required a substantive administrative burden related to review and approval. For example, evaluators were responsible for sending faculty reminders if submissions were late, following up if any links were broken, and soliciting wet signatures for approval of final evaluations. Table 2 compares the processes using the manual approach versus Interfolio for data management.

Table 2

A Comparison of Manual and Interfolio Approaches for Faculty Data

Management

Process	Manual Approach	Interfolio Approach
General Process	Narrative and artifact submission varies across academic units. Evaluators and Administrative Assistants must manually track submission status, approval status, and send reminders to faculty.	Interfolio adds standardization to the process of what faculty submit, including soft or hard deadlines for faculty submissions to require timely compliance. Evaluators and Administrative Assistants can easily track submission status and workflow approval with timestamps.

Annual Review	Faculty lack clarity around what activities can be counted for teaching, scholarship, and service. Faculty spend significant time linking artifacts; evaluators encounter broken Dropbox/Google links. Evaluators and Administrative Assistants rely on email threads with faculty for submission; hard to track missing/late cases. Higher administrative time spent downloading and opening annual evaluations to report Merit rankings or work identifying faculty accomplishments for reports and recognition.	Faculty Activity Reporting provides clarity on where to report activities and what can be counted for workload activities. Interfolio offers easy navigation of embedded documents and artifacts. Evaluators conduct reviews in one place and can track and sort by case status. Interfolio offers the ability to export a summary of annual review rankings via CSV file, reports on workload activities by semester/year, and faculty CVs for accreditation or grant applications.
Review, Promotion, & Tenure	Administrative time spent on generating Dropbox folders, setting permissions to release/lock access for faculty and evaluators, and emailing evaluation letters to faculty.	Interfolio offers the ability to generate a batch of Review or P&T cases for eligible faculty, grant or restrict case access based on role or committee status, create committees for central access and the ability to recuse individual members, and upload and share evaluation letters to faculty.

System Adoption

The Interfolio platform rose to the top of the institution's adoption list because it was already in use by sister institutions in the Nevada System of Higher Education, and faculty who had used the system previously discussed positive experiences. The institution negotiated a five-year contract to adopt the Faculty Activity Reporting (FAR) and Review, Promotion, and Tenure (RPT) suites to modernize the manual

faculty review and evaluation process. The FAR suite is used to track faculty activities related to teaching, scholarship, and service in order to populate a summary of work (e.g., a Vita) required for annual review. The RPT suite collects, manages, and routes annual review, third-year review, and promotion and tenure dossiers through approval workflows for academic positions. At the conclusion of each RPT case, the data is saved in the system and is accessible for the faculty or administrators to review.

Initial quotes for the five-year Interfolio contract (generated in 2022) were based on a faculty size of 107 full-time faculty. For year one, the FAR suite was quoted at \$15,000 and the RPT suite was quoted at \$8,867; quoted prices increased annually by 4% to account for inflation. The year one quote also included additional one-time implementation and training costs—\$12,000 for FAR and \$1,733 for RPT. Interfolio's Data Service, which scrapes internet sources like Google Scholar for faculty publications, is an optional add-on for \$7,500 with a one-time implementation fee of \$1,275. Because Interfolio offered a 15% sign-on incentive on first-time contracts, the institution opted for a five-year contract instead of the standard three-year agreement; this strategy resulted in an additional cost savings of \$16,961.44.

Interfolio's FAR and RPT products included both prescribed and customizable features that could be aligned with the institution's review, promotion, and tenure policies. This allowed for an intentional buildout of the FAR sections that were tailored to the activities expected of faculty at a teaching-intensive institution. Customized build-out of Interfolio aligned with institutional policy is critical because each section included in FAR signals to faculty that this type of work is important for tracking and documentation and is counted for annual evaluation and promotion. Data entered in FAR can be exported and analyzed to support data-driven decision-making and fulfill institutional reporting (e.g., accreditation, grants).

All three co-authors were responsible for customizing the elements in the FAR and RPT suites to align with the institution's revised evaluation processes. The first two authors were tenured faculty who had previously served as faculty senate chairs; one also served as a department chair. These previous roles bolstered their

knowledge of institutional policies and procedures that supported building a highly tailored set of activity reporting sections that captured all forms of teaching, scholarship, and service work and followed institutional policies for annual review, promotion, and tenure.

Aligning Interfolio Processes to Institutional Policy

NS's promotion, tenure, and annual review (PTAR) policies already offered clear guidelines for how teaching, scholarship, and service activities counted for annual review or tenure and promotion. Within each evaluation category of teaching, scholarship, and service, the policies included lists of common activities that had been categorized by anticipated faculty effort and aligned to a weighted point value ranging from low effort items worth 1 point to high effort activities achieving 4 points (see Appendices A, B, and C). For example, in the Scholarship category, a workload-intensive activity like publishing a paper is weighted as a Level A activity worth four points, while submitting an abstract for a conference is weighted as a Level C activity worth one point. The PTAR policies explicated the total number of points needed to earn an Unsatisfactory, Satisfactory, Commendable, or Excellent rating during a single annual review period. For example, earning an Excellent in Service on the annual review requires 8 points, but must be comprised of activities that exceed expectations in a sustained manner, which is measured by a mix of moderate Level B or high effort Level A activities. (Appendix C).

Prior to the adoption of Interfolio, the institution had recently revised the PTAR policies to be more inclusive of multiple forms of faculty activities. Specifically, the scholarship and service sections of the policy were modified to include recognition of high-impact practices and activities that take considerable time but often go uncredited (Guarino & Borden, 2017; Hanasono et al., 2019) and are critical for student retention (Lillis, 2011). For example, supervision of undergraduate student research projects that result in a conference presentation (Level B) or publication (Level C) were added as activities that earn points in Scholarship. These additions benefit faculty in Science, Technology, Engineering, and Math (STEM) disciplines,

who frequently engage students in undergraduate research projects. In the Service category, work with students was added along with recognition of effective advising and mentorship, such as mentoring students in post-graduate pathways or providing socio-emotional support to distressed students as a Level B or C, depending on the number of students served or level of effort. These additions to the professional service expectations benefit all faculty and ensure credit for invisible forms of work in their annual reviews and promotion or tenure dossiers.

There were unintended benefits of ensuring the FAR and RPT suites were designed in compliance with institutional PTAR policies. It brought key Academic Affairs stakeholders (provost, deans, chairs) together to review and resolve issues with policy discrepancies across schools and to critically discuss how a supervisor conducts an evaluation. During the policy review, the project team identified 13 policy discrepancies where the same types of activities were worth fewer points in one school versus another. For example, serving as the president of the faculty advocacy group received four Service points in two schools, while a third school classified it as only 2 points. The project team brought these inconsistencies forward to Academic Affairs leadership to discuss and resolve, resulting in consistent and higher points awarded across the schools. Another benefit of platform and policy alignment was initiating greater standardization of submission and evaluation processes across the academic schools. Before the adoption of Interfolio, each school operated independently to establish submission and evaluation procedures. In two schools, faculty described their annual activities and then specified a self-evaluation rating for Teaching, Scholarship, and Service. The supervisor's written evaluation was concise and largely concurred with or disagreed with the faculty's self-assessment. In contrast, another school required the supervisor to complete a comprehensive written summary of the faculty's activities and designate the evaluation rating in each category. Comparing the different approaches to annual evaluation resulted in robust discussions among the deans and department chairs about the purpose of the annual review, the level of detail expected to justify faculty activities, and the amount of feedback evaluators should provide in the performance evaluation. These

discussions resulted in more transparent expectations for faculty self-evaluations, including improved annual review instructions, suggested word limits for sections, and recommended artifacts or attachments for inclusion. These guidelines were intended to reduce the narrative length and simplify the annual review process for faculty. Ultimately, simultaneously building out Interfolio and reviewing institutional policy resulted in a comprehensive and inclusive system, along with a greater standardization of processes across schools.

Interfolio Customization

Timeline

The preliminary buildout and implementation of Interfolio spanned several academic semesters with the primary team (first two co-authors) and the grant-funded faculty affairs administrator (last co-author) each dedicating approximately four to six hours a week from January – May 2023. Interfolio's first contract included implementation support, which met weekly, to introduce the program functionality and outline deliverables for the project team to achieve by the next meeting. The team opted to work collaboratively to build out sections, which allowed for live edits and feedback. A single person could spend a similar amount of time, but would need more iterative feedback from constituents.

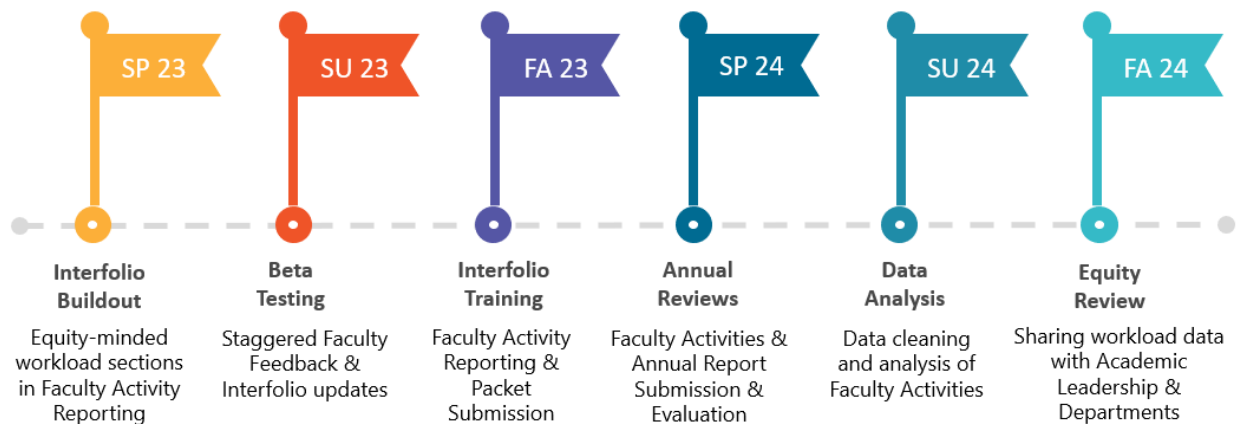
The project team chose to implement Interfolio first with faculty in the School of Liberal Arts, Sciences, and Business (LASB), which houses the STEM disciplines required to be served by the ADVANCE award. As shown in Figure 1, the initial buildout and first beta testing rounds occurred over seven months (Spring/Summer 2023). The project team held training for FAR in early October/November 2023 and RPT packet submission in December 2023/January 2024 when annual reviews were due. LASB faculty entered activities in FAR and completed their 2023 annual evaluations in Spring 2024. The first author analyzed service data from FAR in the Summer 2024 and presented the results to the campus community in Fall 2024.

In the second year of implementation (2024-2025), the project team continued

to refine FAR sections based on administrator and faculty feedback, which resulted in the list of activities shown in Figure 2. Faculty requested that additional FAR sections in Teaching, Service, and Scholarship be embedded in the system. In the first iteration, narrative portions of the annual review were prepared in a Word document and uploaded in the RPT case. Faculty felt this process did not fully use the power of Interfolio to streamline the annual review. As a result, new sections capturing the teaching narrative, teaching accomplishments, reflection on student feedback, as well as self-evaluation narratives and goals were created. In order to uniformly launch these sections across all schools, Deans had to discuss evaluation expectations, align language for faculty instructions with policy, and establish expected word limits. This process resulted in a more uniform annual review with concise but helpful narratives for faculty evaluations. In Spring 2025, all three academic schools adopted Interfolio to track faculty activities and complete annual reviews.

Figure 1

Timeline of Interfolio Buildout and Implementation



Importing Institutional Data

Successful setup of a new information system requires strong collaboration between the project team and institutional technology, institutional effectiveness, and/or data warehouse teams, who will need to clean, merge, and correctly format

employee data to import into the data management system. Sen et al. (2017) cited the lack of compatibility and inability to merge data from existing university data systems as the primary challenge to implementing new institutional software. For example, institutions of higher education rely on several proprietary platforms to support institutional operations, including human resource management (e.g., Workday, PeopleAdmin, Banner), course scheduling (e.g., PeopleSoft, CourseDog), curriculum proposal management (e.g., Watermark), and student course evaluation software (e.g., EvaluationKIT). A faculty data management system will minimally require faculty information supplied from human resources about title, current rank, and time in rank. The most robust systems will also require importing information from course scheduling and evaluation software to summarize faculty's teaching assignments.

In the initial phases of system setup, NS's data management team was first required to develop tables identifying institutional unit hierarchies (e.g., departments nested within schools/colleges nested within divisions). This information is relevant for organizing and filtering faculty by unit, which is necessary when building review cases or running reports. Next, NS's data management team had to identify and organize existing sources of institutional data, including course enrollment, student evaluations, and grade distributions to connect to each faculty profile. Once faculty information was populated into the system, the project team could emulate faculty users and preview the system from their viewpoint. With a complete roster of faculty information, faculty users could begin logging into the system to preview and beta-test various sections of activity reporting.

Data integrity was another consideration that arose during this data management process. Fossen et al. (2021) warned of data entry inaccuracies and encouraged institutions to populate these systems with campus records related to faculty employment information (rank, title, promotion history), course enrollment, and student evaluation data since this information has a bearing on faculty performance reviews. Most systems allow fields populated with institutional data to be "locked" to ensure integrity; however, best practice suggests including contact information to

report inaccuracies. For example, NS nursing faculty noticed inaccuracies in reported course data for their lecture and clinical courses. NS's data warehouse team identified that the error came from how the registrar coded classes in PeopleSoft. The registrar resolved the issue for subsequent semesters so that the data collected from PeopleSoft could be accurately imported into Interfolio.

Customizing Faculty Activity Reporting Suite

The first component of customizing FAR is to decide which activities faculty are responsible for reporting. Interfolio provides a pre-generated list of activities; however, we found it to be limited in its ability to fully capture the breadth of faculty workload activities. The activity sections an institution chooses to include are likely driven by their institution type (e.g., Carnegie status) and data reporting needs (e.g., accreditation, grant reporting, annual evaluation). Figure 2 illustrates the customized list of activities for a research-intensive university (left; University of Rhode Island, 2024) and NS (right), a teaching-intensive university.

Figure 2

*Comparison of Faculty Activity Reporting
Sections at Different Institutions*

▶ Research: Scholarly Contributions and Productions	▶ Teaching: Annual Goals and Goal Progress
▶ Research: Grant Activity	▶ Teaching: New Accomplishments
▶ Research: Intellectual Property	▶ Teaching: Courses Taught and Supporting Documents
▶ Research: Student Research Projects	▶ Teaching: Student Supervision and Practicum
▶ Teaching: Courses Taught	▶ Teaching: Professional Growth and Development
▶ Teaching: Independent Studies and Other Learning Projects	▶ Teaching: Reflection on Student Feedback
▶ Teaching: Student Advising	▶ Teaching: Annual Review Self-Evaluation
▶ Teaching: Student Mentoring (graduate)	▶ Scholarship: Annual Goals and Goal Progress
▶ Teaching: Workload Adjustments	▶ Scholarship: Professional Growth and Development
▶ Teaching: Non-Credit Instruction	▶ Scholarship: Discovery and Creation
▶ Teaching: Course/Curriculum Developments and Revisions	▶ Scholarship: Dissemination
▶ Service: Institutional Committees	▶ Scholarship: Grants or Sponsored Projects
▶ Service: Other Institutional Service	▶ Scholarship: Student Supervision
▶ Service: Professional	▶ Scholarship: Annual Review Self-Evaluation
▶ Service: Community	▶ Service: Annual Goals and Goal Progress
▶ Professional Development	▶ Service: Institutional Committees
▶ Awards and Honors	▶ Service: Delivered Lectures, Talks, or Workshops
▶ Membership	▶ Service: Advising and Mentorship
▶ Consulting	▶ Service: External, Professional, or Humanitarian Work
	▶ Service: Additional Work
	▶ Service: Annual Review Self-Evaluation
	▶ Other Professional Duties
	▶ Consulting
	▶ Honors and Awards

A primary goal of adopting Interfolio was to track and analyze faculty activities that are often invisible, unreported, and unrecognized. Therefore, the project team sought to build an inclusive list of activities that reflected the revised institutional policy, which included more recognition of invisible work in Scholarship and Service. For example, the team customized sections to collect information on student research supervision (scholarship) and advising and mentoring (service), as described above. Figure 3 shows how the team intentionally configured the advising and mentoring section to recognize a variety of common but less documented activities (e.g., writing letters of recommendation, providing career/graduate school support, and providing socioemotional support). Faculty could report how many hours they spent per semester on these activities and include a brief narrative to justify their designated service point level (e.g., Level B instead of Level C). Including these activity categories prompts faculty to document invisible work, which can be recognized and credited in their annual performance evaluations.

Figure 3*Activity Input Form for Service: Advising and Mentoring***A** Advising or Mentoring Information

For each entry, please indicate:

1. **Total # of Advisees** (enter number)
2. **Classification** (Student Club/Org, Undergraduate Student, Graduate Student, Faculty Member, Other)
3. **Advising Type** (Academic Advising; Career Advising; Graduate School Advising; Job/Graduate Materials; Course Assistant/Peer Support; Club/Org Advisor; Faculty Mentorship, Job Reference, Internship Reference)

Start Semester*	Spring ▼	2025 ▼
End Semester*	Ongoing ▼	Ongoing ▼
Total # of Advisees*	1	
Classification*	Select ▼	
Advising Type*	☐ Club/Org Advisor ☐ Course Assistant/Peer Support ☐ Academic Advising ☐ Career/Graduate Advising ☐ Social / Behavioral Advising ☐ Letters of recommendation ☐ Feedback on materials ☐ Faculty Mentorship ☐ Job Reference ☐ Internship Reference	

B Advising or Mentoring Details

For each entry, please indicate:

1. **Name(s) of Advisees** (optional)
2. **Description** (optional) - Consider FERPA guidelines and avoid providing personal or identifying information about students' circumstances.
3. **Estimated Hours** (optional)
4. **Artifact Level** (Level A [highest], Level B [intermediate], Level C [lowest])

Add Attachment: You may upload a **representative artifact** as an attachment to support your narrative. Note that the quality of evidence is more important than the quantity of artifacts.

Name of Advisee(s) (optional)	
Description	+ 11pt ▼ B I U x₂ x² ≡ ≡ ≡ ≡ ≡ ≡ ≡ ≡ Ω <> 0 WORDS
Estimated hours per semester (optional)	

C Activity Classifications

Artifact Level* ?	Select ▼
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Another important customization in FAR is the use of “activity classifications.” Activity classifications can be developed to provide additional context for a given activity. For example, an administrator could develop an activity classification to ascertain what type of funding a person has been awarded (e.g., Corporate, Federal, Foundation, University, Not-for-profit, State, Other). When a faculty member selects an activity classification from the dropdown menu, their response can be used as a filtering option when running report summaries or generating a vita. The NS project team used the activity classification feature to ask faculty to categorize their Scholarship and Service activities using the designations codified in the policy (see Section C of Figure 3). For example, faculty could designate each of their entries as a Level A, B, or C activity corresponding to a numeric point value (e.g., Level A activity = 4 points). This approach allowed faculty, department chairs, and deans to quickly count the points associated with each activity and have a uniform understanding of the expected annual evaluation rating (e.g., 8 points = Excellent in Service). In turn, administrators can export and analyze what forms of service faculty engage in and make data-driven decisions in pursuit of the equitable distribution of service. This is particularly important at our institution, which requires inclusion of moderate and high effort activities to achieve an Excellent and student advising is often listed as low effort work. Supervisors can use this data to assist faculty with diversifying their Service workload in order to reach an Excellent rating.

Ultimately, each activity section must be customized to collect information the institution needs to fulfill its reporting goals while affording faculty the space necessary to document and explain their work for annual performance evaluations. This includes configuring which reporting fields (e.g., dropdown, checkbox, open-ended textbox) should be used, developing clear descriptions and instructions for each section, and determining what fields are required or optional. The FAR buildout initially involved a lot of trial-and-error editing existing templates and ended up opting to build new sections from scratch, which required approximately four to six hours of work per week for the first six months.

Once the preliminary FAR buildout was completed in July 2023, the project team recruited three to four faculty beta-testers from each school for feedback on naming conventions, clarity of instructions, and whether the selected data fields allowed faculty to describe their activities adequately. Faculty were given an orientation to the system and approximately one month to provide feedback in a shared document. Faculty beta-testers received \$50 gift cards for their service and buy-in was amplified by the project team in immediately integrating their feedback into the platform. In November 2023, the team completed a second round of beta-testing and real-time editing of FAR and RPT sections in order to prepare for annual review submissions due in January 2024.

Customizing Other Interfolio Elements

After customizing FAR, other Interfolio components will also require customization for full functionality. The Interfolio Vita is similar to a CV and primarily summarizes activities for a given evaluation period (e.g., annual review or tenure probationary period). Vitas are populated for various reasons, including performance evaluation, accreditation reports, or grant applications. Customization of the Vita includes designating which activities to populate, the preferred order to present the activities, and the way to display entered information (e.g., listing versus tabular format). An institution's project team will be responsible for customizing Vita templates for annual review or promotion and tenure, which will be populated into a faculty's RPT case.

Building RPT packet templates requires customizing the submission requirements for the faculty and outlining the workflow steps for evaluating and approving the packets. First, the system administrator will need to select the appropriate Vita template and designate the relevant date range for the type of evaluation being conducted. Next, the administrator can request that faculty upload additional documentation that would not have been collected in FAR. For example, faculty may be asked to upload documentation related to years toward tenure or other narratives. System administrators will populate review committees and

designate who receives access at each step of the evaluation. For example, university-level evaluation committees typically only receive access to candidate dossiers at their stage of review before forwarding their recommendation to the provost. Once RPT templates are built, it is easy to batch generate multiple faculty packets all at once for a given review or evaluation period.

Intentional creation of activity sections, vita templates, RPT cases, and evaluator forms will significantly reduce administrator and faculty workload burden. Once sections or templates are built, they typically require minimal maintenance and can be duplicated or modified in future iterations. Successful customization leads to improved standardization and streamlined workflow that benefits faculty, evaluators, and administrators.

Next, we discuss preliminary results from the first year of using Interfolio, including faculty's perceptions of Interfolio and an examination of service differences across faculty.

Method

Participants

All 68 faculty in the School of Liberal Arts, Sciences, and Business submitted their 2023 annual evaluations via Interfolio. The demographic composition of the faculty included 20 women of color, 20 white men, 18 white women, and 10 men of color. A subset of 59 faculty (87%) completed the external evaluation survey about using Interfolio. A subset of 55 faculty (81%) entered their service activities into FAR.

Measures

Perceptions of Interfolio. The project team coordinated with the grant's external evaluators to solicit feedback on Interfolio from LASB faculty, chairs, and the dean. Faculty responded to six survey items assessing perceptions of Interfolio using a 6-point Likert scale with no midpoint (1 = *strongly disagree* to 6 = *strongly agree*; see items in Figure 4) and open-ended questions soliciting feedback.

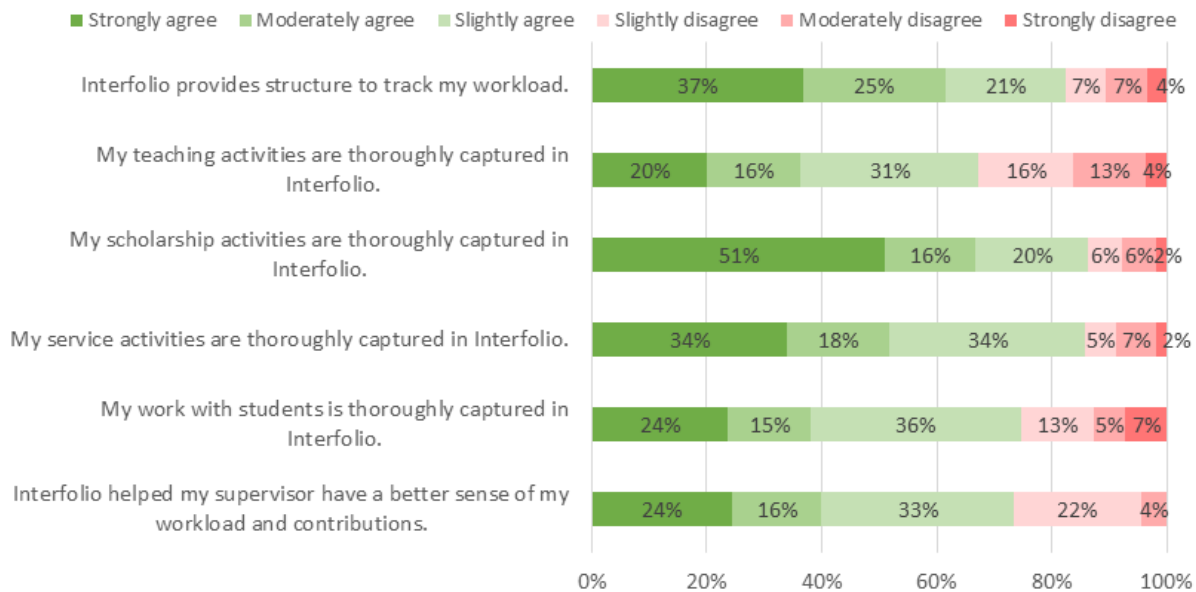
Total Service Points. Total service points earned at each artifact level were extracted from faculty's 2023 annual evaluation summaries ($n = 68$ faculty).

Service Points by Category. Comma-separated values (CSV) files were exported from Interfolio for the five categories of service assessed in FAR: (1) institutional committees, (2) delivered talks and workshops, (3) advising and mentoring, (4) external service, and (5) other service. All activity entries for each category were merged into one file linked by faculty ID. Fifty-five faculty entered their service activities in FAR, resulting in a total of 723 unique service activities reported. We computed the total number of points earned within each service category for each faculty member. Level A activities earned 4 points, Level B activities earned 2 points, and Level C activities earned 1 point (see Appendix C).

Results

Perceptions of Interfolio

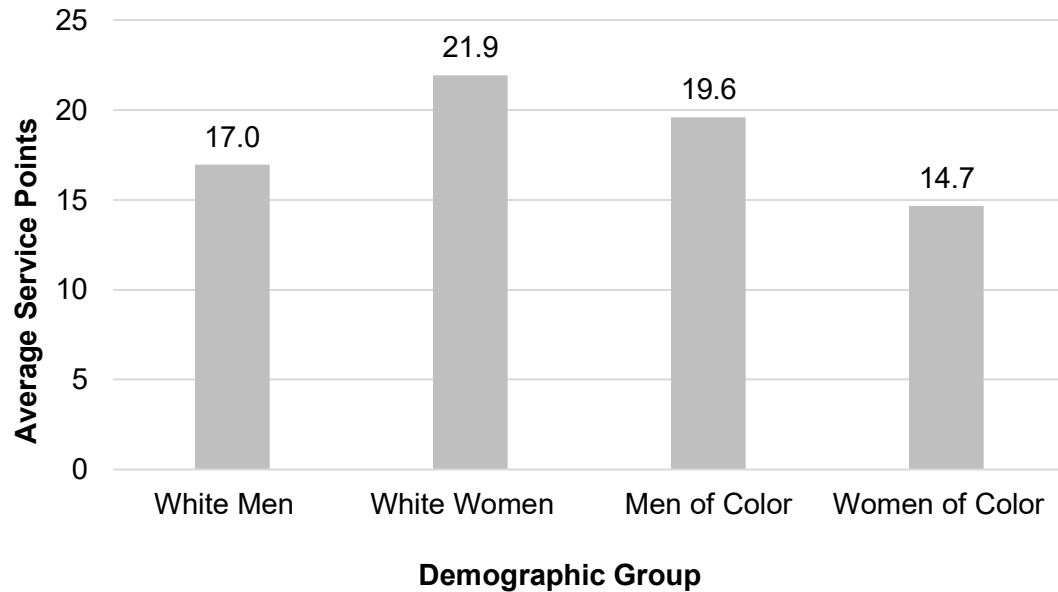
In the first year of Interfolio use, at least three-quarters of faculty agreed with positive statements about the software (all means were greater than 4.0). Faculty were most likely to agree that Interfolio captured their scholarship activities (67% moderately or strongly agreed; $M = 4.94$, $SD = 1.33$) and provided structure to track their workload (61% moderately or strongly agreed; $M = 4.67$, $SD = 1.39$). Faculty also agreed that their service activities were captured in Interfolio (52% moderately or strongly agreed; $M = 4.61$, $SD = 1.29$) and that Interfolio helped their supervisor better understand their workload and contributions (40% moderately or strongly agreed; $M = 4.33$, $SD = 1.19$). Faculty were least likely to agree that their work with students (38% moderately or strongly agreed; $M = 4.16$, $SD = 1.44$) and their teaching activities (36% moderately or strongly agreed; $M = 4.04$, $SD = 1.40$) were thoroughly captured in Interfolio.

Figure 4*Faculty Perceptions of Interfolio***Total Service Points**

First, we examined whether there were gender or racial differences in total service points earned. The total service points reported by 68 faculty in their 2023 annual review self-evaluation form were used. To examine group differences, we conducted a 2×2 , between-subjects ANOVA to evaluate the effects of faculty gender and racial group on total service points earned. There was no significant main effect for gender, such that men ($M = 17.83$, $SD = 9.45$) did not differ in total service points compared to women ($M = 18.11$, $SD = 8.95$), $F(1, 64) = 0.00$, $p = .99$. There was no significant main effect for racial group, such that white faculty ($M = 19.32$, $SD = 9.90$) did not differ in total service points compared to faculty of color ($M = 16.30$, $SD = 7.84$), $F(1, 64) = 1.08$, $p = .30$. There was a significant interaction between gender and racial group, $F(1, 64) = 4.94$, $p = .03$. As shown in Figure 5, white women ($M = 21.94$, $SD = 10.45$) reported the highest service points and women of color reported the lowest service points ($M = 14.65$, $SD = 5.62$).

Figure 5

Total Service Points Earned by Demographic Group



Note. Total $N = 68$; white men = 20, white women = 18, men of color = 10, women of color = 20.

Next, we examined the interaction with faculty rank, comparing untenured faculty (tenure-track and lecturers) to tenured faculty (associate and full professors). We conducted a 2 (Rank: Tenured, Untenured) $\times$ 4 (Demographic Group: White Men, White Men, Men of Color, Women of Color), between-subjects ANOVA to evaluate the effects of faculty rank and demographic group on total service points earned. There was no significant main effect for demographic group, $F(1, 38) = 2.14$, $p = .11$, nor a significant interaction, $F(1, 38) = 0.24$, $p = .87$. However, there was a significant main effect for faculty rank, $F(1, 38) = 8.42$, $p = .006$. Tenured faculty ($M = 23.24$, $SD = 7.75$) reported more service points than untenured faculty ($M = 15.08$, $SD = 7.57$).

Service Points by Category

Second, we examined the total number of service points within each of the five categories of service measured in FAR. The descriptive statistics are reported in Table 3. Faculty who reported their service activities in FAR earned an average of 19 service points, far exceeding the 8 points needed to earn an Excellent in service. Faculty earned the most points from committee work, followed by advising and mentoring.

Table 3

Descriptive Statistics for Points Earned by Service Category

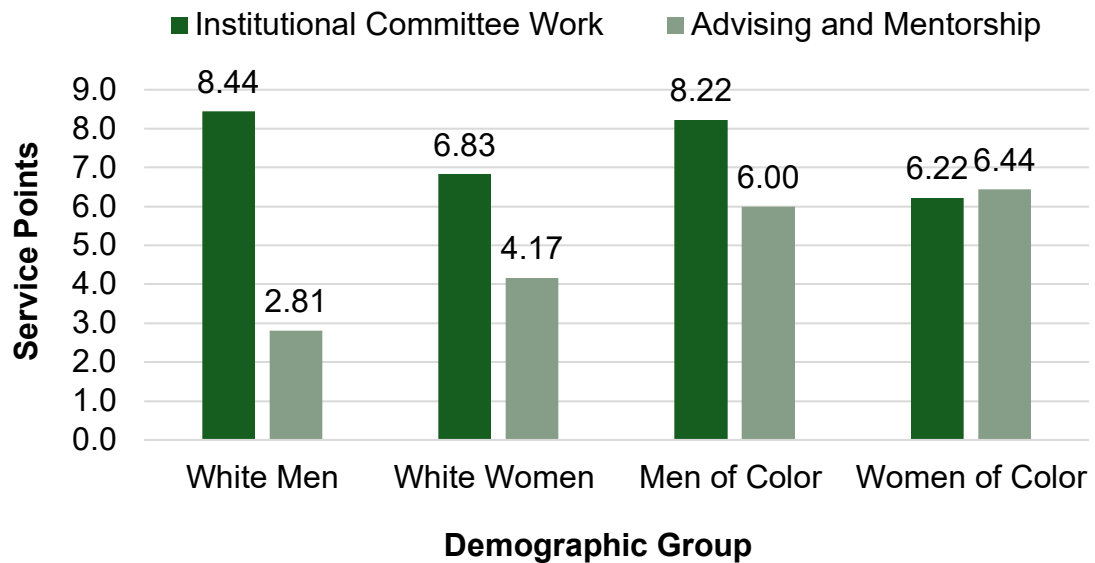
Service Category	<i>M</i>	<i>SD</i>
Institutional Committee Work	7.33	4.81
Advising and Mentorship	4.82	4.53
Other Service	3.91	4.70
Delivered Talks and Workshops	1.56	2.59
External Service	1.45	2.31
Total Service Points	19.07	9.69

Note. *N* = 55 faculty.

Next, we conducted two 2×2 , between-subjects ANOVAs to evaluate the effects of faculty gender and racial group on service points earned from: (1) institutional committee work and (2) advising and mentoring. Average service points earned by category and demographic group are shown in Figure 6. White men ($M = 8.44$, $SD = 4.86$) reported the highest number of service points from institutional committee work; however, no main effects nor the interaction were significant (all $F_s(1, 51) < 1.77$, $ps > .19$), indicating no gender or racial group differences in points earned from committee work.

Figure 6

Average Points Earned by Demographic Group and Service Category



Note. Total $N = 55$; white men = 16, white women = 12, men of color = 9, women of color = 18.

For points earned from advising and mentoring, there was no significant main effect for gender, such that men ($M = 3.96$, $SD = 3.90$) did not differ in advising and mentoring service points compared to women ($M = 5.53$, $SD = 4.95$), $F(1, 51) = 1.77$, $p = .19$. There was a significant main effect for racial group, such that faculty of color ($M = 6.30$, $SD = 5.28$) reported more service points from advising and mentoring compared to white faculty ($M = 3.39$, $SD = 3.15$), $F(1, 51) = 4.97$, $p = .03$, Cohen's $d = .69$. Women of color ($M = 6.44$, $SD = 5.41$) reported the highest number of service points from advising and mentoring; however, the Gender $\times$ Racial Group interaction was not significant, $F(1, 51) = 0.14$, $p = .71$.

Follow-up paired t-tests were performed within each demographic group to compare service points earned in each category. We applied a Bonferroni correction

to control for four pairwise comparisons, resulting in an α of .0125. As shown in Figure 6, white men earned more points from committee work ($M = 8.43$, $SD = 4.86$) compared to points earned from advising and mentoring ($M = 2.81$, $SD = 2.78$), $t(15) = 3.82$, $p = .002$, $d = 1.47$. The difference in service categories for white women approached significance, $t(11) = 1.92$, $p = .08$. There were no significant differences between the service categories among the faculty of color, all $ts < 1.14$, $ps > .29$, suggesting they earned similar amounts of points from committee work and advising/mentoring.

Discussion

Interfolio Implementation

Overall, the initial implementation of Interfolio was successful and was well-received by most faculty users. Faculty agreed that Interfolio helped track most elements of their workload, especially scholarship and service. However, faculty showed the least agreement with Interfolio effectively capturing teaching activities; these perceptions reflected reality. In the initial customization of FAR, the project team was focused on comprehensively capturing scholarship and service activities and did not build out additional sections to capture teaching activities. The only teaching section initially included was the hard-coded section providing a summary of courses taught and student quantitative evaluations. In the first year of use, faculty continued to complete their teaching self-evaluation externally in a Word document and uploaded the narrative to Interfolio. One faculty commented, "It was not clear how to capture teaching activities within Interfolio and the written submission. I think Interfolio is primarily created for quantitative data and lists of activities. But the nuances of teaching and how they fit our standards for the annual review as well as promotion and tenure is not clear." After receiving this feedback, the project team customized additional sections related to teaching that are shown on the right side of Figure 2. In the second iteration of annual reviews, faculty no longer had to complete a separate Word document and all annual review activities could be documented in FAR.

Faculty also reported that Interfolio was less effective at capturing their work with students. While we improved efforts to track invisible service such as advising and mentoring, it became clear that the PTAR policy on assigning points for service with students needed additional clarification. For example, some faculty entered individual service lines for each letter of recommendation they wrote (earning 1 point for each entry); others consolidated their letter writing into one entry and made a case for the work to count as a B-level activity (earning 2 points). In order to earn an Excellent, faculty contributions must include moderate or high-level service activities (see Appendix C). This highlights the importance of providing faculty with training to effectively describe and document their contributions—particularly in ways that align with the criteria for A or B-level service effort.

These discrepancies also call for revisions to the PTAR policy and evaluation process, namely, providing uniform guidance on the amount, quantity, or time required to be categorized as A, B, or C-level activities. During the second iteration of annual reviews, deans and chairs discussed areas where point discrepancies could occur during their annual review training session. They discussed ways to resolve inconsistencies so that evaluators used the same criteria when deciding how many points to award. Supervisors were encouraged to treat FAR data not as a rigid output metric but as a conversation starter to contextualize effort, particularly in areas where outcomes varied despite similar time investment. Several evaluators requested that faculty edit how they report certain service activities to ensure more uniform documentation, including adjusting the categorization of service levels to reflect the correct level of effort. NS's academic leadership plans to revisit the point structure and provide more explicit criteria to determine how to categorize service efforts at each level during the next round of revisions to the PTAR policy.

Finally, some faculty reported challenges in adapting to a new system to complete their annual reviews. Although the project team held many training sessions across multiple modalities and developed step-by-step guides for use (see Appendix D), faculty were not required to attend training, and tenured faculty were the least likely to do so. This resulted in holding additional one-on-one consultations with

faculty needing assistance, such as on where to enter specific activities or troubleshoot errors. Institutions adopting new software should require new faculty to attend trainings and hold annual refresher trainings for existing faculty. Review committee members and evaluators also need training on accessing, reviewing, and formally evaluating faculty submissions in RPT. Lastly, we recommend using Interfolio's automated system to send faculty reminders to update their activities at the end of each semester, so faculty are not entering all their annual activities immediately before the annual review deadline. Streamlining data requests and faculty workflow to align with contract dates increases workload transparency for supervisors and allows for more informed decision-making.

Service Differences

Gender differences in service activities have been demonstrated across multiple studies; however, much of this work has relied on subjective self-reports where faculty are asked to estimate the number of hours they spend on various activities (e.g., Eagan & Garvey, 2015; Winslow, 2010; Xu, 2008). A core strength of the current research is that we were able to analyze service data that was reported for annual faculty evaluations using an activity reporting system. To date, only a handful of studies have used faculty activity reporting connected to annual performance evaluations as a source of data to examine gender differences in service (i.e., Guarino & Borden, 2017; O'Meara et al., 2017a).

Another strength of our design was that we were able to analyze service activities that had been quantified using standard point values that recognized different levels of time or effort (e.g., Level A, B, C). Guarino and Borden (2017) used data from faculty activity reporting to examine gender differences in the total number of service activities completed. They found that women reported engaging in, on average, at least 1.4 more service activities relative to men. However, their measurement of service activities did not account for the type of service (visible or invisible) nor the amount of time faculty spent on each activity.

Because NS's PTAR policy uses a standardized point system for different service activities, we were able to evaluate faculty's total service points earned across activities that were weighted based on the time or effort spent on that activity. Using service levels reported in FAR, we found that faculty at a teaching-intensive institution engaged in high amounts of service far exceeding the required amount to receive an Excellent rating on their performance evaluations. Replicating prior research (Misra et al., 2011; Neumann & Terosky, 2007; O'Meara et al., 2017a), we also found that tenured faculty reported engaging in more service (averaging 23 points of service) compared to untenured faculty (averaging 15 points of service). Our data suggests that untenured faculty on our campus seem to benefit from some level of protection from service because they averaged fewer points of service relative to tenured faculty. Another possibility is that more service opportunities require membership of tenured faculty (see Misra et al., 2011).

In terms of gender differences in total service points, we initially found no differences in total service points earned, but did find a significant Gender x Race interaction. We found that white women engaged in the most service compared to other demographic groups (Guarino & Borden, 2017; O'Meara et al., 2017a; O'Meara et al., 2017b). Additional analyses showed that service points for white women mostly resulted from committee work. In contrast, we found that women of color reported engaging in the lowest number of service points. Additional analyses showed that untenured women of color reported the least amount of service ($M = 11.10$, $SD = 3.81$), but tenured women of color engaged in much higher amounts of service ($M = 20.50$, $SD = 3.15$). Future research should explore factors influencing service choices among women of color; perhaps these untenured women of color received strong mentorship around vetting and accepting service requests.

A third strength of our research is that our activity reporting system was designed to explicitly measure more invisible forms of service such as advising and mentoring. O'Meara et al. (2017a) used faculty activity reporting to examine the number and type of committees (e.g., department, school/college, or university level) that faculty served on. O'Meara et al. found that women reported engaging in more

committee work at all levels within the university. However, they acknowledged that their activity reporting tool did not solicit information on “hidden service” such as informal mentoring or other departmental “housework” (p. 19).

Because we intentionally customized our reporting software to include more invisible forms of service, we are one of the first studies to be able to examine gender differences in invisible service using software that more concretely tracks faculty activities. We found that faculty spent most of their time on committee work (a visible form of service) and that advising and mentoring was the second most common type of service—a finding that might otherwise have been overlooked because this type of service is rarely tracked or quantified.

In terms of gender differences across different types of service, we found some group differences that aligned with previous research. Similar to Hanasono et al. (2019), we found that white men engaged in more committee work that is considered highly visible and engaged in less advising and mentoring, a more invisible form of service. We also found that faculty of color were more likely to engage in advising and mentoring compared to white faculty, replicating previous self-reported research (Joseph & Hirshfield, 2010; Wood et al., 2015).

Finally, our data showed that women of color at all ranks engaged in comparable levels of visible committee work to other demographic groups, but they also reported engaging in higher levels of advising and mentoring compared to white faculty. Previous research suggests that unequal workloads correlate with various consequences, including decreased productivity, burnout, and job dissatisfaction (e.g., Eagan & Garvey, 2015; Misra et al., 2012; O'Meara, 2016). This sentiment was captured in NS faculty's qualitative comments describing the unique challenges of serving students at a teaching-centered MSI with a high proportion of first-generation, underrepresented students. Women, especially women of color, discussed how much care work they did with students, especially during and after the COVID-19 pandemic. Many discussed the psychological toll it took on them because this work is emotionally taxing, time-consuming, goes unrecognized, and results in not feeling valued or appreciated by the institution. In future research, we plan to explore how

service differences in visible and invisible service correlate with job satisfaction and intentions to leave the institution.

Steps Towards Equity

The implementation of Interfolio and the initial quantification of service results are the first steps toward addressing workload inequities at our institution. Guided by O'Meara et al.'s (2022) framework for *Equity-Minded Faculty Workloads*, we have begun addressing several foundational conditions they identify as essential for fostering workload equity, including creating greater transparency in how service is assigned, ensuring recognition for invisible labor, fostering accountability through data-informed decision-making, and supporting faculty agency by aligning service with professional interests and goals. As O'Meara and colleagues (2022) emphasize, addressing workload equity requires not only better tools, but also a shift in institutional culture toward fairness, inclusion, and shared responsibility.

At the department level, the project team shared findings on service workload with participating department chairs and their faculty. Faculty discussed areas where greater transparency and equity were needed in work assignments. The project team communicated several key concerns to university leadership, which led to direct institutional responses. For example, one prominent issue faculty raised was that search committees required five members who collectively met gender and racial diversity thresholds. While intended to support inclusive hiring, this requirement placed a disproportionate burden on faculty of color. In response, the provost collaborated with Human Resources to revise the policy, reducing the minimum committee size to three members. This change helped reduce the total number of faculty needed to complete searches and the number of asks of faculty of color to serve on search committees.

Faculty also reported receiving service requests from multiple units across the university, often through informal channels. These requests were frequently vague, making it difficult for faculty to assess whether participation aligned with their professional goals or available time. To address this, deans began promoting a

cultural shift: encouraging that service requests be routed through the appropriate dean, chair, or director rather than asking faculty directly in conversation or via email. Building on this shift, the provost now recommends that committee chairs include a clear summary of the anticipated time commitment, deliverables, and service-level designation when soliciting faculty participation. This added clarity helps faculty make informed, strategic decisions about their service commitments and supports more equitable workload distribution.

Aligned with these efforts, the project team also engaged department chairs directly in professional development focused on equitable workload practices. Department chairs participated in a one-day workshop facilitated by workload equity expert Dawn Culpepper to explore tools and strategies to address equity challenges in faculty workload distribution. A central theme that emerged was the disproportionate service burden placed on faculty in understaffed departments or newer academic programs, where limited personnel often resulted in fewer options for distributing service equitably. To address this, chairs discussed the value of conducting service audits to gather faculty preferences for future service opportunities. By pairing faculty interests with a clear understanding of their current service commitments, chairs noted that they could minimize reliance on the “hallway ask” and instead make more intentional, data-informed assignments. Chairs' efforts to align assignments with faculty interest and capacity suggest incremental progress at the departmental level.

Equity efforts at the department level must be complemented by institutional efforts to recognize and reward faculty who consistently take on high levels of service. With the adoption of Interfolio, supervisors and evaluators now have access to more consistent and reliable data to support transparent, evidence-based recognition. As a result, supervisors are better positioned to nominate deserving faculty for institutional awards—especially those that honor student mentorship and service excellence—based on documented contributions rather than informal impressions or word-of-mouth. Furthermore, this approach ensures that recognition is not limited to the most publicly visible service roles but also captures the behind-the-

scenes work essential to student success and institutional functioning. Future endeavors to recognize faculty efforts could include mentoring excellence spotlights on campus communications or social media to improve awareness.

While improved documentation and recognition are important first steps, some institutions have gone further by establishing formal programs that provide tangible support for faculty who undertake extraordinary service. For example, the University of Wisconsin–Madison (n.d.) created the *Exceptional Service Support Program*, which offers course releases to faculty who perform service activities beyond standard expectations for tenure-track and tenured faculty. Building on this model, the dean of the school where this project was first piloted is developing a similar program that allows faculty to apply for course releases. This would provide critical time for scholarship—especially for junior faculty—ensuring that sustained service does not come at the expense of progress toward tenure and promotion.

Limitations and Future Directions

Although the present research extends our knowledge of gender differences in different types of service, our generalizability is limited by a small sample of faculty within one school at a teaching-intensive university. Additionally, some faculty did not enter their service activities in FAR, which further limited our power. Despite these limitations, we had decent subsamples of faculty of color that allowed us to analyze intersectional differences in service. In future research, we plan to examine trends in service over time across all faculty at the institution, especially after the institution engages in additional activities that address workload inequity.

Although we have preliminarily shown that faculty of color report engaging in more advising and mentoring, we discussed the impact of NS's confusing policy language on how to document and credit this type of work accurately. Anecdotally, faculty have shared that they typically enter all their committee work but stop tracking invisible forms of service because they have already surpassed the points needed to earn an Excellent evaluation rating. This suggests that faculty are likely to underreport the total amount of service spent on advising and mentoring, likely due to

burnout associated with tracking and entering every student meeting. As one reviewer pointed out, these reporting differences may result in different outcomes that continue to reify workload inequities.

One consequence is that supervisors develop unrealistic benchmarks for what a typical service workload entails. For example, a faculty member may record only the minimum number of mentorship meetings required to receive an "Excellent" rating, obscuring the significant time spent preparing, supporting students outside formal sessions, or managing complex advising cases. Supervisors may assume that other faculty can achieve the same outcomes with far less effort, inadvertently creating pressure for increased productivity without adequate support. Another concern is that supervisors might discourage certain types of service, especially relational or student-centered work, if they perceive it as detracting from research productivity or other highly visible institutional priorities. This could disproportionately affect faculty who take on identity-based or relational care work, which is often undervalued despite its importance to student success and institutional mission (Lillis, 2011).

These unintended consequences underscore the need for a broader cultural shift—one that affirms the value of all forms of service, including relational and identity-based work, and encourages faculty to document these contributions consistently, not only for evaluation but as a matter of professional visibility and institutional recognition. When faculty know that all contributions—not just the first few—can be acknowledged and potentially rewarded, they may be more inclined to fully report their mentoring and advising efforts. Over time, this shift can lead to a more accurate and comprehensive record of the critical role faculty play in supporting student success.

Conclusion

The disparities observed in service contributions—particularly the invisible labor disproportionately performed by women and faculty of color—reinforce longstanding concerns about workload inequities in academia that result in burnout,

job dissatisfaction, and faculty turnover. Implementing Interfolio at NS represented an important step toward increasing transparency about faculty workload and taking steps to ensure equitable distribution and recognition of all forms of service. O'Meara et al.'s (2022) *Equity-Minded Faculty Workloads* report and workbook offer best practices that chairs, deans, and administrators can employ to mitigate unequal service. Using the equity-minded workload framework, institutions can create a more equitable distribution of service responsibilities while recognizing and rewarding faculty who take on additional service work. Ultimately, higher education administrators can support systemic change by committing to tracking, evaluating, and addressing workload disparities to foster a supportive, sustainable work environment for all faculty.

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Appendix A

Teaching Quick Guide

The teaching effectiveness examples are drawn from the Annual Review, Promotion, and Tenure Policies. Faculty should always reference their Unit's policy for complete details on submission requirements for any evaluation period.

Teaching Rating Categories

- **Unsatisfactory:** Fails to meet expectations. Faculty members have not effectively executed some essential Teaching responsibilities and/or their approach to Teaching and assessment results in significant student complaints. An “Unsatisfactory” rating indicates evidence of more than one of the examples listed in policy.
- **Satisfactory:** Meets expectations. Faculty members are expected to be competent teachers, as evidenced by the creation of a classroom climate that respects students and welcomes diversity, the absence of major problems or written student complaints related to an instructor's courses, and by quality contributions as described in the policy.
- **Commendable:** Exceeds expectations. Faculty consistently meet and exceed “Satisfactory” performance standards as well as consistently and effectively elevate students' learning experiences through student-centered pedagogy, thoughtfully-designed activities and assignments, and inclusive classroom practices.
- **Excellent:** Exceeds expectations in a sustained manner. Faculty consistently meet and exceed “Commendable” performance standards as well as consistently and effectively elevate students' learning experiences through student-centered pedagogy, thoughtfully-designed activities and assignments, and inclusive classroom practices.

Unsatisfactory*	Existence of major student written complaints about one or more of the instructor's courses. (Faculty may explain mitigating circumstances they believe led to unreasonably poor student evaluations within their Teaching narrative.)
	Rating of 'poor' through evaluator feedback in course evaluations
	Fails to satisfactorily carry out essential teaching responsibilities such as instruction, assessment of student work, posting grades
	Little to no student-centered pedagogy
	Fails to sufficiently improve in aspects of teaching identified in previous annual reviews as essential areas for improvement
	Substantiated formal student documented complaint
Satisfactory	Generally satisfactory student comments and numeric ratings
	Well-developed syllabi (e.g., office hours, well-developed and feasible topical calendar)
	Canvas course is minimally organized (e.g., meets basic requirements updated landing page, syllabus, and up-to-date gradebook)
	Adequate rigor for course level (e.g., objectives, evaluation criteria/methods, readings, texts, updated course materials)
	Instructor develops major assignments, projects, exams, or other assessments that assess course learning outcomes
	Instructor demonstrates consistent feedback to students on class assignments given in a timely fashion.
	Instructor develops a rapport with students; fosters positive classroom climate; is responsive to students
	Instructor provides regular office hours (e.g., established/posted office hours; availability by appointment)
	Final grade distributions not significantly skewed in a persistent manner. (Faculty members may submit rationale within their Teaching narrative explaining cases in which grade distributions are skewed.)
	Participation in CTLE programs (SON only)

Commendable	Meets goals set in annual review plan or new goals/accomplishments that developed during the year
	Mostly positive student comments and numeric ratings
	Develops and uses innovative course materials, teaching and active-learning techniques, experiential learning, or technologies
	Adapts and improves teaching (e.g., CTLE workshops, FLCs, or teaching/learning conferences) based on feedback from students/evaluators
	Provides effective feedback in a reasonable timeframe such that students are aware of their progress throughout the course
	Provides individualized feedback on student work (LASB only)
	Assesses the effectiveness of teaching endeavors
	Applies appropriate rigor for the course level
	Assesses student learning
	Designs multiple forms of assessments or activities that measure various levels of Bloom's Taxonomy (LASB)
	Incorporates or addresses diversity issues in course or course materials (e.g., universal design; culturally diverse authors/readings)
	Incorporates practices that foster an inclusive classroom (e.g., universal design principles, culturally diverse and responsive examples)
	Canvas course is well organized and developed (e.g., uses modules; announcements; weekly overviews; advanced design tools)
	Uses NS Support Services to connect student to resources (e.g., CARE team; Scorpion Success Network (LASB)
	Supervision of an independent study or experiential learning activities that include assessment of student learning (SON only)
Excellent	Consistently positive student comments and numeric ratings
	Consistently integrates active learning strategies in the classroom
	Consistently designs and/or integrates highly-engaging and appropriate learning materials
	Demonstrates efforts to design and revise courses based on evidence from published literature on Teaching effectiveness
	Instructor is highly attentive to classroom dynamics; works to ensure the participation of all students
	Demonstrates consistent and well-researched innovation in pedagogy such as technologies and teaching techniques that is practically applied and successful most of the time
	Effectively integrates written work and data-driven strategies that improve student writing skills
	Receipt of a Teaching award or teaching-related grant
	Earns external certification in Teaching practices (ACUE, CTLE, etc.)
	Uses evidence-based feedback techniques (e.g., live grading, feedback, exam reflection (LASB)
	Designs innovative student assessments or activities that assess the highest levels of Bloom's Taxonomy (LASB)
	Uses techniques/assignments that build, scaffold, or strengthen student learning over the term (LASB)
	Demonstrates use of inclusive policies (e.g., late policies and assignment revision policies) (LASB)
	Demonstrates responsiveness to students' individual circumstances (e.g., contacting students who need additional support) (LASB)
	Earning/maintaining external nationally-recognized certifications in teaching/practice (e.g., NLN, ANCC AANP) (SON)

Appendix B

Scholarship Category Ratings

Rating	Definition
Excellent	Exceeds expectations in a sustained manner, as indicated by:
	1. One level-A item, or equivalent; OR
	2. Two level-B and two level-C items, or equivalent.
Commendable	Exceeds expectations, as evidenced by either:
	1. Two level B items or equivalent; OR
	2. One level B item and two level-C items.
Satisfactory	Meets expectations, includes either:
	1. Two level-C items or equivalent; OR
	2. One level-B item or equivalent.
Unsatisfactory	Fails to meet expectations.
	Fails to produce evidence of a Satisfactory performance.

Example Scholarship Activities by Artifact Level

The artifacts listed are guidelines and do not replace the discretion of your dean. Artifacts may be justified at a higher-level dependent on workload.

Level A [4 points]
Superior contributions of scholarly effort or equivalent and demonstrates Scholarship that is Peer Reviewed, juried, or undergoes an external review.
Peer-reviewed journal article
Substantial role in guiding an undergraduate research project that is accepted for peer-reviewed publication
Acceptance of a national-level external research grant
Acceptance of scholarly peer-reviewed or editor-reviewed book chapter or textbook
Exhibition, publication, or release of substantial creative work in a peer-reviewed venue or conference
A patent on research or creative works (SoE)
Serving as chair of a Master's thesis and/or Doctoral dissertation committee (SoE)
Publication of a software application that serves academic, public, or business needs (LASB)
Publication of a paper in the proceedings of a major conference (LASB)
Guest editing an issue of a journal (LASB)
<i>Evidenced activities with similar time, scope, and intellectual commitment to the items above.</i>
Level B [2 points]
High-quality contributions of scholarly effort or equivalent; emphasis is on quality/substance versus quantity.
Submission of manuscript to a refereed publication for initial peer-review
Presentation of a new scholarly paper or a research presentation at a professional conference
Substantial role in mentoring a student to present at a professional conference
Mentoring a student to publish work in an undergraduate research journal or creative outlet
Refereeing a book for an academic press
Submission or receipt of a regional external grant where the level of contribution may be indicated by whether faculty member is among principal researcher
Completion of two or more chapters of an accepted book or resubmission of an accepted book that is a synthesis of previously compiled knowledge
Peer-reviewed exhibition or release of a single, discipline-specific, stand-alone piece of creative work
Completion of a scholarly technical/professional report or monograph
Publication of a laboratory work book
Acceptance of a book prospectus
*^Serving as editor of a Peer Reviewed or guest editing an issue of a journal or book (LASB = A)
*Invited public scholarship, e.g. keynote speaker, blogs, editorials (SoE = A)

Appendix C

Service Guide

Rating	Definition
Excellent 8 points	Exceeds expectations in a sustained manner 1. One level-A and two level-B items = 8 points 2. One level-A, one level-B, and two level-C items = 8 points 3. Three level-B and two level-C items = 8 points
Commendable 6-7 points	Exceeds expectations 1. Two level-B and three level-C items = 7 points 2. One level-A and one level-B items = 6 points 3. Three level-B items = 6 points
Satisfactory 4-5 points	Meets expectations 1. Two level-B items and one level-C item = 5 points 2. One level-B and three level-C items = 5 points 3. One level-A item = 4 points
Unsatisfactory 0-3 points	Fails to meet expectations 1. One level B item and one level C item = 3 points 2. Three level C items = 3 points 3. One level B item = 2 points

Example Service Activities by Artifact Level

The artifacts listed are guidelines and do not replace the discretion of your dean. Artifacts may be justified for higher points dependent on workload.

Level A [4 points] Substantive involvement in or guidance of a meaningful endeavor that requires a significant time commitment
Faculty Senate Chair
NFA President
Curriculum Committee Chair
University Promotion and Tenure Committee chair
Search Committee Chair
President (local, state, regional, or national professional or learned society) (SoE)
Supervise Clinical Observation Hours, outside of clinical instruction (SoE)
^Editor of a Journal (SoE) (could be classified as scholarship activity)
<i>Evidenced activities with similar time, scope, and intellectual commitment to the items above.</i>
Level B [2 points] Substantive involvement in a meaningful endeavor that requires a moderate time commitment and/or reflects the faculty member's contribution to the accomplishment of an important institutional goal.
Holding office in Faculty Senate (vice chair, secretary, parliamentarian)
Chairing a Faculty Senate committee, or actively serving on a Faculty Senate committee with regular meetings
Search Committee Member
Outcomes Assessment Chair
Outcomes Assessment Member
Curriculum Committee Member
Documented significantly substantive student-centered activities that go well beyond a faculty advisory role
Documented mentorship or personal support of students that significantly extends beyond an advisory role
Playing a significant role in planning a conference
Participating in a significant humanitarian endeavor relate to the faculty member's discipline, position, or skills
*Substantially developing or revising curricula or programs (LASB/SON = B, SOE = A)
Serving as a faculty mentor or providing significant mentorship to another faculty member (SoE)
^Serving as Co-Editor of a Journal (SoE) (could be classified as scholarship activity)
Chair of Honors or Graduate Thesis committee (SoE)
Chairing or actively serving on an NSU Committee or Taskforce that holds regular meetings (SoE)

Course Lead (SoE)
Leading NSU or NSHE Programming Initiatives (e.g., CORE revisions, corequisite revisions, or similar activities) (LASB)
Providing substantive comments/feedback or revisions on one or more school or campus-wide policies (LASB)
Providing significant administrative support for programs or department organization or function (LASB)
Faculty Advisory Committee (LASB)
Strategic Planning Chair (LASB)
Designing and leading all-campus events to foster campus community, pedagogy, and/or support (LASB)
Developing and teaching training workshops for faculty (LASB)
Developing and leading groups for faculty and staff scholarly support (LASB)
Creating and disseminating substantial pedagogical materials for a cross-institutional audience (LASB)
<i>Evidenced activities with similar time, scope, and intellectual commitment to the items above.</i>
Level C [1 point]
Substantive involvement in a meaningful endeavor that requires a low time commitment and/or reflects the faculty member's contribution to the accomplishment of an important institutional goal.
Serving on the Travel and Incentive Grant committee or another committee with infrequent meetings
Serving as a Faculty Senate representative
*Serving as an officer in a local, state, regional, or national professional or learned society (SOE = B)
Leading a campus presentation
Actively recruiting at college fair events
Representing a department or organization at an all-campus event
Presenting at a faculty development workshop
Volunteering with a private or public organization related to the faculty member's discipline, position, or skills
Providing pro bono consultation to individuals or local, state, regional, national, or federal organizations
Contributing in a significant way to a committee for a governmental, academic, or community organization
Establishing partnerships with external organizations (e.g. internships)
^Writing a grant for a community organization (could be classified as scholarship activity)
*Acting as faculty advisor to a student organization or club (SoE = C, LASB = B, SoN = A)
*Student meetings that provide mentorship (e.g., career/professional advising) beyond the advisory role (SOE =A)
Student meetings that provide personal support beyond the advisory role
Actively contribute to required program or department meetings (SoE)
Member of an Honors or Graduate Thesis committee (SoE)
^Reviewer for a journal (SoE) (could be classified as scholarship activity)
Maintaining office hours for student advisees (SoN)
Participating in NSU/NSHE initiatives (e.g., CORE revisions, Corequisite revisions, or similar activities) (LASB)
Strategic Planning Member (LASB)
Faculty Advising Liaison (LASB)
Participating in candidate recruitment activities (LASB)
Letters of recommendation (LASB)
Drafting and submitting strategic initiative budget requests on behalf of Department or Unit (LASB)
<i>Evidenced activities with similar time, scope, and intellectual commitment to the items above.</i>
^May be Scholarship based on justification
*Indicates known workload differences between disciplines, refer to your Unit's policy.

Appendix D

Quick Guide to Faculty Activity Reporting used for Annual Reviews

Academic faculty will begin completing the entirety of their Annual Review within Interfolio, including describing progress on annual goals or new teaching activities and documenting scholarship and service activities. Most activities provide textboxes for optional narrative descriptions. Faculty will upload representative artifacts within the relevant **Activity Section**. When Annual Reviews are due, faculty will review their “**Annual Summary of Faculty Activities**” Vita and submit it for evaluation. At the conclusion of the evaluation period, faculty will complete a form acknowledging receipt of their evaluation and agree or submit their rebuttal.

	Activity Section	Information to Enter	Evidence Uploads (up to 15 pages)
Teaching	Annual Goals and Goal Progress	- Enter new Annual Goals for next evaluation year (using SMART goal framework). - Provide status update and description for Annual Goals made for current evaluation year.	Representative artifacts for teaching effectiveness for each completed goal.
	New Accomplishments	Document new teaching accomplishments completed during evaluation period (e.g., new preps, updated activities/assignments).	Representative artifacts for teaching effectiveness for each accomplishment.
	Courses Taught and Supporting Documents	Review Course Evaluation Mean of Means & Grade Distribution.	Syllabi [required for all courses] Course evaluations [required for all courses] Class observations [required for one course during evaluation period] Sample student assessment (e.g., assignment; evaluation rubric) for one course during evaluation period [SoN required].
	Student Supervision and Practicum	Enter details of student supervision (e.g., theses) or practicum supervision.	None
	Professional Growth and Development	Document attendance in CTLE or other teaching-relevant workshops. (This counts as Scholarship for Lecturers)	Proof of attendance is <u>NOT</u> required.
	Reflection on Student Feedback	- Review student evaluations and select representative quotes that illustrate your teaching effectiveness. - If relevant, identify themes or student quotes that highlight areas for improvement.	None
	Annual Review Self-Evaluation	Specify your self-evaluation rating for Teaching and add your teaching narrative.	Paste your teaching narrative in the textbox or upload the narrative document.

	Activity Section	Information to Enter	Evidence Uploads (up to 15 pages)
Scholarship	Annual Goals and Goal Progress	- Enter new Annual Goals for next evaluation year (using SMART goal framework). - Indicate status update for Scholarship Goals made for current evaluation year.	None (Any scholarship artifacts would be uploaded to the associated activity section).
	Professional Growth and Development	Document participation in workshops or conferences that strengthen your scholarship or professional identity	Proof of attendance is <u>NOT</u> required.
	Discovery and Creation	Report scholarship activities that lead to the development or production of research findings or artistic creations.	Representative artifacts
	Dissemination	- Report scholarship activities that are intended to communicating findings, knowledge, product(s), or artistic work for the benefit of others. - Update the status of your work as it undergoes review [e.g., in progress; submitted; revise and resubmit; accepted].	Upload evidence of any presented or published works, links to presentations, or creative exhibits.
	Grants or Sponsored Projects	- Report grants that you have applied for or are actively managing. - Include a brief description of the project or intended grant activities.	Representative artifacts
	Student Research Supervision	Provide details for any supervision of student research that counts for Scholarship.	Representative artifacts
	Annual Review Self-Evaluation	- Specify your self-evaluation rating for Scholarship based on your Unit's policy. - Identify the number of scholarship activities completed at each level (A, B, C). - Optional narrative to provide additional context for your evaluator.	None
Service	Annual Goals and Goal Progress	- Enter new Annual Goals for next evaluation year (using SMART goal framework). - Indicate status update for Service Goals made for current evaluation year.	None (Any service artifacts would be uploaded to the associated activity section).
	Institutional Committees	Report your committee work done at NS.	Representative artifacts
	Delivered Lectures, Talks, or Workshops	Document your presentations you have delivered for an audience.	Representative artifacts
	Advising and Mentorship	Document advising or mentoring activities with students or faculty.	Representative artifacts
	External, Professional, or Humanitarian Work	Document service that you have conducted with professional/academic agencies or community/civic organizations.	Representative artifacts
	Additional Work	Document any other forms of service not captured in the previous sections.	Representative artifacts
	Annual Review Self-Evaluation	- Specify your self-evaluation rating for Service based on your Unit's policy. - Identify the number of service points completed at each level (A, B, C). - Optional narrative to provide additional context for your evaluator.	None

Laura P. Naumann

Dr. Laura P. Naumann, Professor of Psychology, is a personality psychologist who has transitioned to exploring factors affecting faculty workload. She served as the lead principal investigator of a National Science Foundation ADVANCE Adaptation project titled Pursuing Equity to Enhance Retention (PEER) from 2022 – 2025.

Samantha Jewell

Samantha Jewell, PhD, is an Associate Professor in Biology and has been studying mentorship models to increase STEM retention for the past 8 years. She was the co-principal investigator of the ADVANCE Adaptation PEER project and is the lead principal investigator of an S-STEM grant.

Erin L. Rider

Erin L. Rider, Ph.D. (Sociology), served as the Assistant Director of Faculty Development and Diversity during the PEER Project. She facilitated faculty professional development programming on scholarship and mentoring. In her previous role, she was a Professor and Department Chair of Sociology and Political Science.