PRO: Professional Record Online

Steering Committee Minutes
November 7, 2011

Linda Mannering gave recognition and accolades to individuals who have aided in the PRO process: Ryan Cherland from OIRP, Nick Stevens and Adrienne Sadovsky from Research and Graduate Studies, Lorraine Haricombe and Ada Emmett from KU Libraries, IT staff who set up authentication procedures, and Pam Burkhead, Lynn George, and Angie Loving from HREO.

A progress report was emailed to the steering committee prior to the meeting. Steve Warren commented that the detailed progress report shows the complexity of the project. He asked if the School of Music implementation will allow for faster implementation in other units in the future. Linda Mannering said that screens and reports created for the School of Music will become the building blocks for other units. Quoting Joshua Rosenbloom, she said that "We're putting in the plumbing." After the "plumbing" is put in, things will progress more quickly.

Linda said that the keying of the vita is extremely time-consuming. Estimating that it will take 12-15 hours to key a vita (and additional time to proof,) Linda said a data entry workforce needs to be hired. Approximately a dozen qualified individuals are needed to key vitas. The School of Music target deadline for faculty to be able to view their printed vitas and access PRO online is February. The campus target deadline for entry of all vitas is January, 2014.

School of Music Charter document

The School of Music Charter document was distributed ahead of the meeting. Linda said that the charter defines the scope, time, and resources to do an implementation. The scope, time, and resources estimated for the School of Music implementation are used to measure actual progress and successful completion. As the campus moves towards implementation in other units, the Music Charter document may serve as a model and be modified specifically for each additional unit that begins the project.

Mary Lee Hummert, as the School of Music Executive Sponsor, Linda Mannering as Project Manager, and Bob Walzel as the School of Music sponsor will sign the charter. Additions to the Charter since the last meeting are general descriptions of deliverables and a check list of principles found in Section 3.

Ben Eggleston said he appreciated the overview of the reporting and asked if it was necessary to have a different charter document for the various schools/college. Linda said that separate school/college charters are necessary to define unique reporting and data collection requirements. Digital Measures has expertise in developing Association to Advance Collegiate Schools of Business (AACSB) requirements that will be reflected in the KU School of Business charter.

Some Leading Indicators

Leading Indicator Reports under development:
> Accepted work (not yet published)
> Research/Scholarship/Creative Activity Work in progress
> Potential Grant/Funding Opportunities
> General Research Fund (GRF) Outcomes Tracking
> Engaged Scholarship for Public Impact
> Intellectual Property (e.g., inventions, patents, licenses)

Dean Walzel called for standardized music vitas to facilitate PRO data entry. Performances, publications, and presentations will be categorized as 'major' or 'minor' in importance. Music faculty will be reorganizing/updating vitas into the standardized format with a deadline of November 15, 2011. Megan Greene asked if music faculty were included in the development of the standardized vita. Linda did not know if faculty were involved in the development of the standardized vita. Mary Lee indicated that the classification of work into 'major' and 'minor' categories is commonly done. Steve Warren offered examples of music performances classified into these categories.

Rodolfo Torres asked if the campus faculty will be required to present vitas in a particular format. The answer is no. Units will decide the best approach. Vitas in existing formats are an option. Units will transmit faculty vitas en masse to Linda. Data entry of vitas to be entered by the temporary pool of workers will be managed by Linda.

Ben Eggleston asked if it would be easy to edit because something that counts as major now may count as minor later. Major/minor coding can be done or updated at any time.

Engaged Scholarship

There were no additions or changes suggested regarding Engaged Scholarship. Deb Teeter indicated that the source of the description included in PRO is in the existing Strategic Planning working documents found at the web site on the agenda. Linda said that each school/unit may further consider Engaged Scholarship and the types of activities that will be identified by faculty reporting on their activities in PRO.

Data Entry

Joshua Rosenbloom asked if there was a different or more efficient way of entering the information. Rodolfo asked if cut and paste would work. Linda said that cut and paste features are available in PRO. There also are options for data uploads, but vita data must be standardized to do this. Vitas in WORD.doc format are preferred and are best for cut and paste. Each unit will be given alternatives to choose from for data loading/entry. Megan Greene asked about information that may not be on the vita and that faculty may want to key data themselves and not leave it to a data entry person. Deb Teeter said that a faculty member may mark on the original CV how to code information such as 'major' and 'minor.' Faculty will have the responsibility for keeping PRO current after the initial

entry. Guidelines established by the steering committee state that no data will be locked in the system and that faculty will be able to update their information including history at any time.

Archiving Documents in PRO

Unit annual evaluation documents will be saved in a PRO archive screen viewable by the individual faculty member or unit administration. The PRO archives screen will house point-in-time snapshot copies of the annual evaluation vita information and related reports. Note that follow-up communication or documents related to annual evaluation will not be saved or placed in PRO.

Contracts, Grants, Fellowships, and Other Funded Activity Screen

The steering committee reviewed the contracts/grants screen and made suggestions about the labeling of data fields and categorization of the information. A question was added to the screen to identify fellowships. Start-up funds will not be reported on this screen.

Implementation Timeline

Mary Lee said that a timeline to bring up all Schools/the College has been drafted with a target finish date by January 2014. Steve Warren pointed out that data entry will become more routinized thereby speeding up progress. Accreditation deadlines are the primary criteria for determining the implementation schedule. School of Business accreditation is 2012 and the School of Education is 2013. If the work progresses as planned, College of Arts and Sciences data entry may begin fall 2012.

Linda indicated that only Digital Measures can create/modify screens and reports and often there is delay in progress as we wait on modifications to be done. These delays are somewhat disruptive to the flow of data entry. Digital Measures turnaround time for creating/modifying screens and reports and performing other tasks typically is taking the full 10 work day time allowance spelled out in our agreement. Linda will explore options to streamline the flow of work between KU and Digital Measures.

Load administrators' vitas

The School of Music agreement with Digital Measures provides for a total 100 FTE faculty in the system. Music faculty total 56 FTE and 44 FTE are available. Mary Lee suggested that Steering Committee members who are faculty forward their vitas to Linda for entry in PRO. Distinguished professors may be invited to participate early in the process, but much depends on the progress made in the next few weeks. Julie Loats said that focusing on the approximate 45 FTE Distinguished Professors in the context of generating public web pages will be good visibility for the project. Linda said that a newly formed Content Management System (CMS) committee has formed to develop standardized web pages. PRO will be a primary source of information for web pages.

In regards to ongoing communication of progress in PRO, Deb Teeter said that if any faculty members want to look at a screen, they can contact OIRP to request to do so. Rodolfo suggested that the Faculty Senate be the first to test the system. An appointment with faculty senate representatives can be set up after the School of Music faculty complete their initial review of PRO. Deb said the

music faculty can talk about their concerns and experiences with PRO. Deb said that music faculty she has talked with are excited for the School of Music to be among the first at the university to use PRO.

Style Preferences/Special Characters and Symbols in Vitas

Rodolfo said that most math faculty don't use Word to write their CV, they use "Tex" which allows them to work with mathematical symbols in publication titles and other types of vita entries. Chemistry apparently uses the same program as Math to create CVs. Linda said that she would explore the "Tex" tool to better understand the issues and challenges with loading math vitas to PRO. Linda said departments will be asked to describe their style manual preferences and other unique requirements.

New features to enhance reporting of publications

Features are being added to take advantage of PRO for organizing publications. Linda is meeting with Geoffrey Husic, KU librarian, to discuss ways to keying English transliterations/translations for publications titled in other languages. Linda is continuing to meet with Ada Emmett to explore use of PRO to accomplish Open Access goals.

The meeting adjourned.