

**Recommendations of the Taskforce
Regarding the Potential Transition to New Software for the Faculty Annual Report
to the Provost and Vice President (Academic)**

14 June 2019

Pursuant to the Memorandum of Understanding “The MOU” between the The Board of Governors of Mount Royal University “The University” and The Mount Royal Faculty Association “The Association” dated 2 November 2018, a Taskforce was struck to guide testing of a potential new Faculty Annual Report System (Faculty 180) and, as appropriate, advise of the system’s implementation.

The taskforce was comprised of the following, as per the MOU:

- One member of the MRFA Executive Board, appointed by the Association (Lee Easton)
- Chair, MRFA Faculty Evaluation Committee (Bob Uttl)
- One Chair appointed by the Chairs Assembly (Helen Evans Warren)
- The Associate VP, Teaching and Learning or designate (Jim Zimmer)
- The Associate VP, Research, Scholarship and Community Engagement (Mike Quinn)
- One Dean (Jennifer Pettit).

The Taskforce met for the first time on 29 April 2019 to review the potential software and outline a process for faculty testing. The MOU specified:

The taskforce will ensure a representative sample of Mount Royal Faculty (including Counsellors, Librarians, Educational Developers and Lab Instructors) test the system with authentic data entry. Based on results of the testing, and within two (2) months of the taskforce’s first meeting, the taskforce will recommend by consensus or by majority vote whether to transition to the new system, and the timing of such a transition.

Subsequently, the Deans facilitated the identification and recruitment of representative faculty members to test the system. Migration of data from FAR 3.0 was conducted prior to testing so that faculty members could have a realistic view of the system content and functionality. Participating faculty members were provided a login to access the system and training was offered through the Academic Development Centre. A total of 28 individuals were provided with access to test the system. Individuals were representative of all faculties including counsellors, librarians, educational developers and lab instructors. A Google Form was provided to facilitate collection of feedback. All feedback was compiled and shared with the Taskforce. A second meeting of the Taskforce was held on 10 June 2019 to review the feedback and make a recommendation.

The Taskforce recommends the adoption and implementation of Faculty 180 (Interfolio) as the platform for faculty annual reporting at MRU with the following conditions:

- Faculty 180 will be implemented beginning with the 2019-20 reporting year (i.e., FAR 3.0 will continue to be used for the upcoming annual reporting cycle),
- Faculty 180 will emulate the current FAR 3.0 to maintain consistency with the existing MOU Joint Committee Report for Revision of the Faculty Annual Reports - June 2015,
- a communication and change management strategy will be launched in the fall semester with the assistance of Marketing and Communications,
- training and support will be provided through the Academic Development Centre,
- additional support will be provided to faculty for data migration corrections through the use of student assistants,
- issues related to data migration identified in the testing phase will be examined to: 1) identify where accuracy can reasonably be improved, and 2) create a communication plan to document the reason for remaining data migration errors and how they faculty members can correct them,
- information and training will include an explanation of why the information is being collected and how it will be used,
- provision of information on classifying activity as 'Indigenous' or 'international' will not be mandatory,
- Faculty 180 will not be used for reporting at a finer scale than Majors,
- data will only be imported from Banner, ROMEO, and sources of truth for teaching evaluations (e.g., Explorance Blue), as well as Far 3.0 for initial data migration,
- the system will be updated to address concerns identified by faculty testers, including, but not limited to:
 - reordering the reporting activities (currently alphabetical) to list teaching first,
 - improving the CV format and provide information on the creation of custom CV formats,
 - providing explanation and alternatives to the CCV categorization,
 - clarification, definitions and examples,
 - option to directly import an existing CV,
 - explore ORCID connections for data input,
- faculty members involved in the first test will be invited to re-test the updated system (a summary of first-round feedback will be provided to facilitate comparison) in October 2019,
- the Taskforce will meet before November 15, 2019 to review the second round of testing and feedback,
- The Taskforce will meet again before January 17, 2020 to review system updates and ensure readiness to proceed,
- Final adjustments to the system will be made by 31 January 2019 followed by data migration to PROD and launch of the system as soon as possible afterwards.