



## PD Session on Annual Reports

Hosted by the MRFA's Professional Development and Faculty Evaluation Committees

*Presented by MRFA President – Lee Easton and MRU Dean of the Faculty of Arts – Jennifer Pettit*

### Overview

The intent of this session was to provide a resource for faculty in terms of how best to complete the annual reports.

### Where is the annual report?

1. Log into mymru.ca
2. Go to the Faculty Tab
3. Scroll down and click on “annual reporting system F180 Active system”

### Technical difficulties:

Contact ADC for support – Sandbox ([sandbox@mtroyal.ca](mailto:sandbox@mtroyal.ca)) – they are best positioned to respond to technical issues

- Training, including video tutorials, are available on the F-180 dashboard, under the "Announcements and Help" tab, by selecting the "Access the Interfolio Help Center" link.
- [Ongoing training, workshops and one-on-one support](#) are available through the Academic Development Centre. Individual questions can be directed to: [annualreports@mtroyal.ca](mailto:annualreports@mtroyal.ca)

### Background:

- [Annual reports](#) were part of a negotiated agreement between MRU and the MRFA when we reduced the workload from 9 courses to 8 for TSS and to 6 for TS faculty. This reduction of workload came with a desire to ensure that there was accountability for the activities that faculty are doing.
- Since we moved to quality council reporting there has been an increased need for MRU to report on scholarly output. This necessitated the shift to new reporting software systems.
- Since 2010 there have been 3 systems used to collect annual reports. The Association has been involved in these processes to ensure that members' rights are protected. When we shifted to F180 we required it to be used for 5 years to have some stability for members.

### Who is required to complete annual reports?

- Those who have tenure, those who are tenure track, including conditional tenurable, and Senior Lecturers.
- Refer to article 12.1.1 for more information and note that there are separate sections for faculty in various types of roles (e.g. sr. lecturers, chairs, librarians etc.)
- Faculty completing tenure dossiers need to include their annual reports in their tenure dossiers.
- Sessional faculty do not need to complete annual reports

## What are reports used for?

- MRU uses data aggregated from the annual report system to report on scholarly output to Campus Quality Alberta

## Timing and Reporting Period for Annual Reports:

- Annual reports are due in the fall to report on the *work from the prior academic year*.
- These are *due the first Tuesday of September* each year (September 6, 2022).
- The system will close after this date: you will not be able to access the system after the date has passed.

## Uploading versus Using the System Generated CV:

You can use the system generated CV or you can upload your own. The system generated one often has formatting issues that make it more difficult to effectively evaluate: the ones that faculty upload are better organized than the system generated ones.

## Activities to report on

In our Collective Agreement there is an [addendum on teaching, scholarship, and service](#). In this addendum, there is a whole list of examples that you can report on in your annual report. This is a good guide for the work you can report on. This is what counts: these are the things Deans want to see in Annual Reports.

In Negotiations we choose words deliberately – the examples provided in the addendum are for guidance only: it is not a comprehensive list. The examples of teaching, scholarship and service may “include but are not limited to...”

### ***What to include in Teaching section of the Annual Report***

- You can select the number of SPoTs you want to use in your report and use the comment box to comment on the results. You can comment on both good and bad SPoTs – use the text box to provide this additional context. You can indicate or speak to response rates or other contextual factors, such as having changed something in the course or running a course for the first time etc.
- *Do not include:*
  - Materials from your course
  - Course outlines
  - Sample assignments
    - Deans need to review hundreds of annual reports and they cannot review course materials – this content belongs in your tenure dossier
    - The annual report is supposed to capture what you have done not how you have done it

### ***What to include in Scholarship section of the Annual Report***

- Presentations, publications, or grants applications applied for or awarded within the period.

- Indicate where you were a presenter or a co-presenter or a discussant. You need to ensure your role is correctly recorded in these items.
- Do not include
  - PDFs of your published articles etc.

#### *Your Scholarship Plan*

- Those on TSS need to submit a scholarship plan but it lasts three years. You submit it in year one and it should last for 2 more then in year 4 you write a new one.
- You need to comment on the progress on your plan – do not change the scholarship plan just change the information/status in the text boxes.
- *Ensure you keep the plan for three years – Do not change the plan every year.* Deans are aware that plans change, sometimes significantly, and the impacts can be noted in the comment boxes

#### **What to include in Service section of the Annual Report**

- Be very clear about what your role is. Use the drop down menus to indicate your role: these are convenient to use.
- If something is not captured, you can add context and related information in the text boxes
- It is really important to *provide context of your service role*. The Deans need to know these details
  - Indicate what you did on the committee
  - What work was done by the committee
  - How often the committee met and how many hours a week it was.
  - If it was external service: how much time was committed, what was the scope (i.e. the size of a conference or the number of days).
- Use service that is relevant to your role at MRU:
  - Service to the discipline or the profession (inward or external to MRU)
  - Departmental, committee and institutional service should be recorded
- What not to use
  - Service unrelated to your discipline or your role at MRU

#### **What do we not put in there? What does not count?**

- Only put in *content from the prior summer to the prior Spring (e.g. July 1, 2021 to June 30, 2022)* keep July and August activities of the current year for the next year's report.
- Ensure old and outdated activities are deleted (need to ensure you are capturing the activities from the current timeframe)
- Do not include information more than once

#### **Tips:**

Start early (to ensure you do not miss anything)

- Create an excel spreadsheet with the same headings that are in the report and add to this occasionally throughout the year. This way, you just need to cut and paste to import it to the annual report.

- Make notes of what you are doing regularly
- Record your work in F180 through the year – F180 is open throughout the year.

If you do not start early

- Refer back you your calendar so that you can try not to miss anything

Last minute problems

- Last minute technical glitches, let your Dean know and submit a paper copy
- However, if you come in three days after it is due and indicate technical issues this will not be received positively. You should be able to address technical glitches in advance and with help from ADC. It is very rare that a technical glitch will prevent you from submitting.

Avoid

- Including links and attachments – if they are required they will be requested.

Follow up

- The deadline for Deans to respond is October 15 and then you need to submit revisions, if needed, by October 31 and then the Dean needs to respond by November 15.
- According to [Collective Agreement article 12.3.3](#) the Dean can request to meet with the employee and then the performance review process could be initiated – members should be aware of this process.

## Questions and Answers:

Will the system still inform us by email of submitted reports or dean's comments?

- The old FAR system would send emails to update faculty: the new system does not send these emails. You need to go in yourself to see the Dean's comments, and they are not easy to find. You can email your Dean to ask them where you can find these comments after October 15.

For someone who started on July 1, 2022 what do you do to submit your report?

- Send an email to [annualreports@mtroyal.ca](mailto:annualreports@mtroyal.ca) and they will get you set up
- Brand new faculty, those who started July 1, 2022, do not need to submit a report until the first Tuesday of September 2023
- This is the same with tenure dossiers – you will not submit your first dossiers until September 2023

If you started July 1 when do you start your scholarship Plan?

- You should start it now and work with your Chair and Assoc. Dean in developing it.
- Be realistic and ensure you are meeting the number of publications required annually for tenure. (In the Faculty of Arts this is 2 articles per year)
- September – June of your first year you are trying to integrate into you teaching role but you do not want to get behind on your scholarship. Also, your 5<sup>th</sup> year is a partial year so it is really only

4.5 years you have to meet the publication requirements. It is valuable, therefore, to begin your scholarship plan right away.

If you are on a sub committee or a working group what should you do – nest it on the committee or create a different entry?

- This should be a different entry.

Do you have to upload teaching evaluations in blackboard dossiers and in the annual report system?

- Yes, it needs to be uploaded to both.

What happens if you put an article in and it is rejected?

- You can then note this in the text box related to that article
- There are drop down menus you can use also to indicate the status of articles

Should you update your scholarship plan?

- Do not change your plan but you can attach a page to say how it is going or use the text box

What should you do if you are in ADC or the Library and the system does not fit your activities?

- This would be a good use of the upload document function in the system: type this up in a word document and upload it.
- You need to feel confident that the report has captured what you have done.
- You need to ensure that the information you are providing accurately and clearly represents the work you have done (do not just say that you went to a conference – you need to be clear if you presented or how you participated in that conference and how long the conference was etc.)

How do you view your annual report before you submit?

- There is a way to do this, and you are encouraged to do this
- You should look at the preview before you submit it (this will help you to ensure that you are not submitting outdated work)

Is there a template for the scholarship plan?

- Yes, there is a template for the scholarship plan
- It was created as an input screen in F180