

Annual Reports Workshop
August 29, 2023

Presented by Lee Easton, MRFA President and Jennifer Pettit, Dean of Faculty of Arts

Key Takeaways/tips:

- Work on completing your report on an ongoing basis throughout the year. Record events, activities, committee service throughout the year.
 - Annual reports are separate from the tenure dossier – once you complete the PDF of your annual report upload it to be included in your tenure file.
 - Make sure you review the PDF before uploading it to your dossier
 - If there are tech glitches
 - It is recommended that faculty upload your own CV rather than using the system generated CV (this is particularly important for tenure track members). The F-180 generated CV does not provide the same level of clarity.
 - General Advice:
 - (for tenure track faculty) Read the tenure and promotion handbook and ensure that you are telling your story effectively
 - Ensure that you do a preview and save the file as a pdf before you submit your scholarship plan or your annual report.
 - Once you press submit on the annual report – you cannot go back and edit it.
 - Only ever upload Pdfs to ensure document consistency / formatting
 - Make use of the text boxes in each section of the annual report to provide context when you can (i.e. also providing context on student evaluations)
 - Refer to the [Addendum on Teaching, Scholarship, and Service](#) in the Collective Agreement as a guide when completing your annual report. (**this is a guide for illustrative purposes and is not restrictive**)
 - do not include information more than once—your Dean reads the whole report so it will be captured
 - start early, especially if you are not familiar with the F-180 system
 - avoid adding lots of attachments—copies of articles, posters, etc.
 - This is NOT your tenure dossier—that is in D2L (though you do upload a copy of your annual report to your dossier in D2L)
 - Teaching:
 - It is recommended to have all of your classes evaluated with SPoTs so that the SPoTs in your annual report / tenure dossier can be your best ones.
 - You need to ensure that you submit the required number of SPoTs (see the CA for the required number of SPoTs for your appointment category)
 - Scholarship:
 - While plans may change, you should not write a new scholarship plan until the end of your 3rd year, for submission in what would be your 4th year. Instead, use the text boxes to provide context for how your plan is going, changed, etc.
 - Service - Only include service relevant to your role at MRU and include details/context
 - Sabbaticals
 - You are required to submit an annual report when you are on sabbatical but it is brief
- NOTE: Contact the ADC for specific issues relating to technical problems with the F-180 report system (sandbox@mtroyal.ca)**

Session Notes

Session Purpose:

Today we have would like to provide you with advice related to:

1. Requirements of the Faculty Annual Report, as outlined in the Collective Agreement
2. Best practices about what to include in your annual report
3. Items that needn't be included in your annual report

Background on Annual Reports

- Prior to 2010, no annual reporting was required of faculty
- The Faculty Annual Report was part of a negotiated settlement in 2010
- There have been three annual reporting systems since 2010
- In 2019, the Association and MRU agreed to use the F-180 reporting software with the agreement that this system will remain in place for 5 years (until 2025)
 - The Collective Agreement requires that you complete an annual report. It is not up to the Deans to permit you to complete or not complete the annual reports

Who Completes the Report

- all tenured, tenurable, conditional tenurable and limited term faculty
- senior lecturers
- lab instructors

Contract instructors do not complete an annual report (nor do fixed term)

If you were just hired in 2023, you don't complete a report until September of 2024. You should though start your scholarship plan right away and enter items throughout the year as it is easy to forget/miss activities.

Annual reports are completed in addition to tenure and other dossiers.

Once completed, you create a pdf of your annual report and upload it to your D2L tenure dossier.

Where do I fill out the Report

- F-180 (owned by Interfolio) is the annual report system.
 - This is software created by an external company that MRU pays to utilize
 - There are often glitches!
- To locate the F-180 system, do the following:
 - Log into MyMRU (www.mymru.ca)
 - Click on the "Faculty" tab
 - On the left, look for "Faculty Development and Reporting" and then click on "Faculty Annual Reporting System (F-180-active system)"

Where do I fill out the Report

- Make sure you are clicking on the proper reporting year (it is always the ACADEMIC year prior)
 - In fall 2023 you are reporting on the 2022-2023 year
- You are free to enter information throughout the year
- You can log in and out as you wish
- There are sections for various activities
- Some things like your SPoTs (teaching evaluations) are uploaded automatically by the system
 - If these have not been automatically uploaded you can still manually upload these.

- Comments:
 - It is a slow cumbersome program

Annual Report Requirements

- **Article 12.1**
 - Recognition and review of Employees' work is both a formative and summative process and a Faculty Annual Report will constitute an important part of this process. The Faculty Annual Report shall be submitted to the Dean each year with a copy to the Chair by the **first Tuesday in September.**
 - **DUE–September 5 this year**
- **Article 12.1.1**
 - The Faculty Annual Report shall describe activities and achievements related to **teaching and service for those in the Teaching-Service work pattern, or teaching, scholarship and service for those in the Teaching-Scholarship-Service** work pattern.
 - For **Employees in the Library, the ADC, and Counselling**, the Faculty Annual Report shall also provide the opportunity to describe other activities and achievements related to their roles.
 - For **Chairs, Associate Deans, and Academic Directors**, the Faculty Annual Report shall also provide the opportunity to describe activities, achievements, and plans related to their administrative roles.
 - **Permanent and limited-term laboratory instructors** please see Articles 6.6 and 6.8 for additional information.

According to the Collective Agreement, there are three parts to your annual report

1. **Information you input into F-180**
2. **A current updated CV--you can use the system CV or upload your own (preferred by the Deans)**
 1. It is recommended that faculty upload your own CV rather than using the system generated CV (this is particularly important for tenure track members). The F-180 generated CV does not provide the same level of clarity.
3. **A scholarship plan for those on the Teaching/Scholarship/Service—there is a section for this in F-180**

What Counts as an Activity?

- Appendix B in the Collective Agreement lists possible activities to include
 - General information, work and activities shall be recorded in four main areas: Profile, Teaching, Scholarship, Service
- See the [Addendum on Teaching, Scholarship, and Service](#) in the Collective Agreement for more detail
 - Note: The Addendum provides illustrative examples, not a comprehensive listing

What Counts as an Activity?

Include ONLY activities from the previous year. For this report, July 1 2022 to June 30, 2023

Tip: Ensure all old and outdated activities are deleted—view your report before you submit it

- It is particularly important to go into the system and update the committee service . Where the committee service is ongoing you do not need to re-enter it every year, but when your term on the committee is complete you should mark it with the end date.

Best Practices for Completing F-180 Teaching

What to include in Teaching

- Select the required number of SPoTs you wish to include in the annual report (be sure to include the minimum under the CA requirements)
 - You get to pick which courses/SPoTs which are included in your Annual reports – of the automatically uploaded SPoTs you can de-select any that you do not want to include.
 - You need to ensure that you submit the required number of SPoTs (see the CA for the required number of SPoTs for your appointment category)
- Use the comment box to discuss the results and provide context for the results.
Eg. Is this a new course the first time delivering revised material, other context, etc.

Do not include materials from your course—no need to include course outlines, sample assignments, etc.

Best Practices for Completing F-180 - Scholarship

What to include under Scholarship

- Report only scholarship activities undertaken in the reporting period
 - Conferences attended
 - Grants applied for and/or awarded
 - Publications that appeared this year only
 - Be sure your role is clear—for instance, did you present at or attend a conference
 - Check your entries to ensure that the status is correct—for instance change “submitted” to “in press”
 - use the text boxes to describe how your research plan is unfolding, changing, etc.

TIP: YOU DO NOT NEED TO INCLUDE PDF versions of your publications

****make sure you fill in all of the drop down boxes and use the text boxes to provide comment/context on your involvement in conferences etc.***

Scholarship Plan Template

In addition to the section where you describe your scholarship activities, there is a template for your scholarship plan. It covers a 3-year period. **While plans may change, you should not write a new report until the end of your 3rd year, for submission in what would be your 4th year.** Instead, use the text boxes to provide context for how your plan is going, changed, etc.

- At the end of year three. At the beginning of year four is when you write a new scholarship plan
- You do not write a new scholarship plan every year.

Best Practices for Completing - F-180 Service

What to include under Service

- be sure that your role is clear

Tip: it is often helpful to provide some written context of the scope of the work in the text boxes

TIP: Include service that is relevant to your role at MRU (eg. serving on your condo board is not included)

Other Helpful Information

- do not include information more than once—your Dean reads the whole report so it will be captured
- start early, especially if you are not familiar with the F-180 system
- avoid adding lots of attachments—copies of articles, posters, etc.
- This is NOT your tenure dossier—that is in D2L (though you do upload a copy of your annual report to your dossier in D2L)

Sabbaticals

Sabbatical Reports and the Faculty Annual Reports

- Faculty on Sabbaticals are still required to complete the Faculty Annual Report.
 - Check your profile, add any service work, and add any publications

Your annual report is completed in addition to the sabbatical report

Technical Issues

Technical Issues with F-180 and/or Unable to Complete or Submit Your Report

- Article 12.1.6 Should an Employee be unable to complete or submit the Faculty Annual Report by the first Tuesday in September as a result of a malfunction in the Faculty Reporting System, the Employee shall submit to the Dean, with a copy to the Chair, a paper version of the Faculty Annual Report containing the required information no later than the second Tuesday in September.
 - **Send an email to the Dean and Chair alerting them to the problem and provide a date when you expect to submit the report (within one week of the usual deadline)**
 - Please note that this is very rare. You should go to the ADC or contact sandbox@mtroyal.ca before you assume the problem is not fixable (it is important to start early and get it done in time)

Further Resources

If you have any questions or concerns about completing your annual report, please see the information available at: <https://courses.mtroyal.ca/faculty180/> or contact the ADC at 403-440-7002 or via email

Timelines for Dean Comments

- Reports are due Tuesday September 5 at 5 PM. The system will be locked at this time
- Article 12.3.1
- **The Dean shall review the Faculty Annual Report and shall respond in writing by 15 October.** The system does not tell you when your report has been approved and there have been some issues with comments/approvals.
- If any revisions are required, the Employee shall revise and resubmit the Faculty Annual Report to the Dean by 31 October. If so, the system will be reopened for you to make the changes.
 - This can happen due to glitches / user error and the Dean will reach out to provide an opportunity for the faculty member to add content
- The Dean shall respond to the revisions of the Faculty Annual Report no later than 15 November on which date it will be closed to further revisions.

Performance Review

Article 12.3. 3

The Dean may request a meeting with a Tenured Employee, hereafter referred to as the Employee, and the Chair, if their performance is deemed not satisfactory.

We will not discuss the Performance Plan requirements today but refer to Articles 12.3.3.1 onwards for the process and related dates

- It is important to remember here that this is one year out of your career: things happen in real life.
- You cannot approach the annual report with neglect nor do you need to think that it is the make or break of your career
- If you are facing difficulties in a year and are worried about your progress, reach out to your Chair, your Dean and / or your Association.
- The annual report is a snapshot in time and the CV provides a longer-term perspective of your career.

Discussion (Q&A)

Question: I cannot find anywhere to enter my information in F-180?

Answer: If you just started this fall – your accounts are being created in F-180.

Question: Only my SEI scores have uploaded to F-180 – is this sufficient?

Answer: The bare minimum is to have the scores uploaded as per the CA. Faculty can upload the Pdfs of their SPoTs to provide a fuller picture of the student evaluation.

Question: What is the CV we are supposed to upload?

Answer: The CV is started with the CV you used to get hired here.

- There are different approaches to academic CVs
- Your CV should be generated in chronological order from the most recent to the previous
- The CV is the same CV you would use when applying for funding/grants/conferences.
- The only thing that Deans are looking at is the prior year.

Question: What will the Dean be looking at in the Annual report – is it okay to leave content out of the Annual Report and include it in the Tenure Dossier

Answer: The more teaching evaluations the better as this provides a fuller picture of what you do.

Upload your course syllabus as this provides a lot of information about your teaching and Deans will look at these.

- What you put into your annual report is one part of what you put into your tenure dossier.
- It is best to do a lot of student evals so that you can pick those that provide the best perspective of your teaching
- Make sure that you provide context on the student evaluations you receive
- Form 300 and there is a space on F-180 to post those.

Question: Is the scholarship plan in F-180 the same as the one in the annual report

Answer: Yes, this is the same scholarship Plan.

Question: do we submit individual SPoT forms from each student?

Answer: the SPoT system will generate a report on the SPoT from each course/section (this is what you receive as a faculty member from SPoTs)

- These are student *perceptions* of teaching

Question: If I only teach one course should I teach multiple sections so I get multiple evaluations

Answer: Speak with your Chair for advice on this – get all courses evaluated

Question: What happens if you submit the annual report twice?

Answer: you can do that, but if you do then it may be reviewed before you resubmit it. If it is absolutely necessary and you submitted it and NEED it reopened you can inquire with your Dean. However, this is only if it is absolutely necessary.

Question: When does the system close?

Answer: The system closes on the deadline at 5:00pm (this year, Tuesday September 5, at 5:00pm).

Question: If my dean's comments are not showing up by the October 15 deadline, what do I do?

Answer: Make sure you are looking at the correct year.

- Email your Dean an inquiry and copy the Association

Question: Regarding the school plan, where you need to add context on your scholarship plan -is this regarding any project you are engaged in?

Answer: this section is to provide perspective on your scholarship in the broad sense – what are your scholarship plans in general and in the longer term

Question: Capturing Indigenous knowledge and content

Answer: Use the text boxes for this where you need to (if these do not print out in the PDF – you need to click on a checkbox to ensure that the text boxes are included)

- It is also best to upload pdfs as well if there is too much content to capture in text boxes in annual report forms
- Do not rely on the annual report to complete your full tenure dossier – your tenure dossier is much bigger than this.

Suggestion:

- You should keep track of your service on your CV so that you do not later need to mine your annual reports to get this information – do a good job of keeping track of committee service. Your CV should be everything so maintain your own.

Moving forward:

- There will be a tenure process session for tenure track faculty in fall 2023
- There are session notes for faculty from promotion processes from 2023 – 2024