FACULTY ACTIVITY REPORTING
PROJECT CHARTER

FACULTY180
THE NEW STANDARD IN FACULTY ACTIVITY REPORTING

Intent

The Office of Institutional Research will organize a University steering committee and project team to select and implement a digital faculty activity reporting system (AKA Digital PAR) that will unify all PAR, vita and faculty credential reporting and data management, along with the development of a workflow process in a single information system for all of Academic Affairs.

Estimated Duration	Initial Risk Score*	Recommended Priority Rating
6 Months	**12**	**75**
04/15 thru 10/15	"Unacceptable – proactively mitigate"	"High"
	*Based on highest initial risk identified in project charter	University value = (9/10) Urgency = (8/10)

Estimated Costs

Procurements:	
Yr 1 Software:	$58,100
Yr 1 Implement:	$48,350
Yr 2 Software:	$60,400
Yr 3 Software:	$62,800
Grad Asst (2 yr):	$48,540
Print/Materials:	$1,000
3 Yr Total:	$279,190

PROJECT MANAGERS:

Fen Yu	Director of Institutional Research
Keith Hearit	Associate Dean, College of Arts and Sciences
Adam Newsted	OIT Project Manager

APPROVAL

James A Gilchrist   6/22/2017

James Gilchrist, Vice Provost Budget and Personnel and Chief Information Officer   Date

John Wolf   6/22/2017

Thomas Wolf, Chief Technology Officer, Office of Information Technology   Date

FUNDING SOURCE

F&CC_____

Approver Signature _____

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DOCUMENT CHANGE HISTORY

Revision Number	Revision Date	Author	Summary of Changes
1.0	04/07/17	Fen Yu	First Version, No Change
2.0	04/27/2017	Fen Yu, Adam Newsted, Keith Hearit	Second Version, minor changes made
2.1	04/28/2017	Adam Newsted	Spelling and grammar corrections Fixed table of contents error
2.2		Implementation Committee Feedback	

ABOUT THIS CHARTER

This charter is written to provide a high-level description of the proposed project. Approval of this charter will authorize and initiate the planning phase of the project including the establishment of the initial project budget.

PROJECT SUMMARY & END-STATE

By the end of this project, WMU faculty will have a digital system portfolio in which to capture all of their professional activities, including but not limited to teaching, research, and service. Specifically, we would want to achieve the following: (1) capture all data that are collected through current PAR and Vita process; (2) customize the system to accommodate individual college needs; (3) enable faculty to record their professional activities at any time; and (4) automatically generate reports for a variety of purposes. Future projects will involve HLC compliance tracking and a workflow process for online reviews.

PURPOSE & JUSTIFICATION

The purpose of the Faculty Activity Reporting project is to streamline the faculty PAR submission process, enable users to easily extract information out of the system for different purposes, and therefore reduce the time needed for faculty and administrative staff to generate reports.

Pursuant to Article 42.12.2 of the Western/WMU-AAUP Collective Bargaining Agreement, the annually required PAR is "based on a form specified by the dean of [the] college." Currently, PARs are submitted by completing a WORD template, which makes it very hard to extract summary information from across units for purposes such as accreditation, program review, strategic planning, etc.

Since October of 2016, an 18-member committee formed by the Provost's Office has been working diligently to identify a centralized data collection, management, and reporting system to streamline the personnel review process commonly known as the faculty Professional Activity Report (PAR) and the related submission of faculty vitae. Through a centralized digital portfolio system, we hope to effectively capture faculty activities that are complex and diverse in nature, showcase faculty accomplishments, and reduce time faculty and administrators spend on culling these accomplishments for accreditation purposes at various levels.

After six months of work, during which we identified our needs, created product specifications, watched vendor demos, and conducted sandbox testing, the committee recommended Faculty180 as WMU's digital PAR system. The purpose of this project is to implement Faculty180 so that faculty can use it for Fall 2017 PAR submission. The implementation team is led by Fen Yu (Director of Institutional Research) and Keith Hearit (Associate Dean of the College of Arts and Sciences), and the executive sponsor of this project is Jim Gilchrist (VP of Budget and Personnel and CIO).

STRATEGIC PLAN ALIGNMENT

This project will align with the Academic Affairs Strategy 3.1.c: Investigate and adopt web-based software to enable the institution to recognize, publicize, and reward faculty/staff scholarly works and creative accomplishments.

OBJECTIVES & SUCCESS CRITERIA

1. Capture all data that are currently collected through the MS Word template
2. Customize the template to meet individual college needs
3. Automate report generation based on the data capture in the system
4. Reduce data entry on the faculty side (do they have a choice to accept or not accept?)
5. Make data more accessible to administrative staff through defined user roles

PRELIMINARY SCHEDULE & MILESTONES

IMPLEMENTATION TIMELINE

- Form an Implementation Committee (4/15/2017)
- Form a Technical Liaison Committee (5/15/2017)
- Determine reporting needs (6/15/2017)
- Customize input sections and forms (6/30/2017) (Is two weeks sufficient time to receive requests from unit and then determine the customized inputs and forms?)
- Map out the data that can be auto-loaded from Banner and PeopleSoft (6/30)
- When will we be able to test customized inputs and forms?
- Explore the option of auto-loading research publications (6/30/2017)Communicate with the various offices/units (e.g., Faculty Senate, Faculty Development) to inform them about this project and get their input (ongoing)
- Determine user account types and user/unit rights (6/30/2017)
- Upload testing data and trouble-shooting (8/1/2017)
- Develop a training program and pilot its use with individual faculty (beginning 8/1/17
- Train the trainers and publicly promote the usage of Faculty 180 (8/30/2017)
  Is this a completion date? Can the training begin earlier?
- Go live for faculty (9/1/2017)
- Training for faculty (9/1/2017 and on)

COMMUNICATION PLAN TIMELINE

- Project initiation and approval
  - Form the Implementation Group, send invitation, and schedule meetings (04/15/2017)
  - Set up a project kick off meeting with Interfolio and get the project started (05/01/2017)
  - Create website for Digital PAR progress updates (05/15/2017)
- University and group communications (Announcements, AITC, Faculty Senate, etc.)
  - Report to the OIT Executive Advisory Board on the progress of this project (continuous)
  - Present to Faculty Senate on Faculty180 (05/11/2017)
  - Set up training space and sessions for user demos (08/30/2017 and ongoing)

INITIAL RISK ASSESSMENT

Initial project risks are outlined below, from highest to lowest impact. See risk scoring matrix for detailed descriptions of risk levels and response types.

1. **Low faculty adoption due to time constraints**
   - **Severity:** 4 (Significant)
   - **Likelihood:** 3 (Possible)
   - **Risk Score**: 12 (Undesirable – proactively mitigate)
   - **Description:** The window of time from when faculty return for the fall semester and when the faculty activity reports are due (10/15/17) is constrained and may result in fewer faculty successfully completing their data entry in Faculty180 on time.
   - **Mitigation plan:** Provide several options for faculty to obtain training including Cool Tools workshops/hands-on training workshops, online training videos, and online training documents. Provide lists of those who attend Train the Trainers workshops for reference within colleges.

DATA INTEGRATION

STATEMENT OF DATA INTEGRATION POTENTIAL

- Data from Banner and PeopleSoft

We will try to preload as much data as possible that already exist in Banner and PeopleSoft. For example, general information such as faculty name, rank, affiliation, courses taught, enrollment, credit hours generated, etc. can all be prepopulated into Faculty180. We met with Sandra Kelly, Associate Director Enterprise Administrative Applications at OIT, and talked about building an API interface so that data imported from Banner and PeopleSoft can be automatically updated on a weekly basis.

- Data on Research and Publications

We will explore the option of preloading some of the research and publication data through WMU's subscription to academic databases.

DATA INTEGRATION PLAN WITH DATA STEWARD INPUT

IR, IT, and Faculty180 will figure out the best practices for data integration in this case. We are using data that are already in Banner and PeopleSoft, which have undergone the input and security of the data steward committee before they are put into Banner or PeopleSoft. Therefore, there is no need to involve them again in this process.

PRODUCT & CONTRACT REVIEW RESULTS

OIT PRODUCT REVIEW RESULTS

We've submitted Faculty180 Product Review Request, and it has been approved by OIT with very constructive feedback, recommendations, and Next Steps. We have acknowledged that we agree to adhere to the Next Steps indicated in the review, and copy of the Product Review Response will be available by contacting Fen Yu, Director of Institutional Research at WMU.

BUSINESS AND FINANCE CONTRACT REVIEW RESULTS

The Business and Finance department has already approved the purchase of this system and allocated funding for this. A copy of the signed contract will be available upon request.

INSTRUCTIONAL OUTCOME IMPACT

AFFECTED PARTIES

- Faculty180 will impact all full- and part-time faculty, but in a very positive way. They will have an intuitive and robust system that allows them to enter ALL of their professional activities going back through the history of their academic appointments. The great thing about this system is that faculty will only need to enter the information once, and they won't be asked again to provide the same information multiple times for other purposes.
- Administrators and staff who support HLC accreditation, college level accreditation, program review and planning will also find this system very helpful in the future. Data that used to take months to collect will be available at their fingertips.

- University Relations, Marketing and Publications, Alumni Relations, Enrollment Management, deans' offices, or any office/division that needs to highlight our faculty's great achievements will find this useful. They can easily get faculty achievement information from this system.

PRIMARY STAKEHOLDERS

Project Originator: Sponsor or originator name here

Name	Title	Unit
Timothy Greene	Provost and Vice President for Academic Affairs	Academic Affairs
Jim Gilchrist	Vice Provost for Budget and Personnel and Chief Information Officer	Academic Affairs
Carla Koretsky	Dean, College of Arts and Sciences	Academic Affairs

Satish Deshpande	Interim Dean, Haworth College of Business	Academic Affairs
Julie Garrison	Dean, University Libraries	Academic Affairs
Daniel Guyette	Dean, College of Fine Arts	Academic Affairs
Ming Li	Dean, College of Education and Human Development	Academic Affairs
Houssam Toutanji	Dean, College of Engineering and Applied Sciences	Academic Affairs
Earlie Washington	Dean, College of Health and Human Services	Academic Affairs
Dave Powell	Dean, College of Aviation	Academic Affairs

HIGH-LEVEL COST ESTIMATE SUMMARY

Are there any training costs that are not covered in this?

ONE-TIME PROJECT COSTS ESTIMATES

Procurement	Qty.	Cost.	#-Year Total
Faculty180	1	$58,100	$58,100
One-time Implementation Fee	1	$48,350	$48,350
Marketing materials (posters, fliers, prints, etc.)			$1,000
Total Est. procurements			**$107,450**

RECURRING COST ESTIMATE (#-YEAR TERM)

Procurement	Qty.	Cost.	#-Year Total
Year 2 Faculty180	1	$60,400	$60,400
Year 3 Faculty180	1	$62,800	$62,800
Graduate Assistant			$48,540 ($24,270/year*2)
Total Recurring Costs			**$171,740**

3 YEAR TOTAL COST (INCLUDING IMPLEMENTATION): $279,190

PROJECT TEAM REQUIREMENTS

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Name	Title	Project Role	Est. Hours
Keith Hearit	Associate Dean, College of Arts and Sciences	Co-Director	480
Fen Yu	Director of Institutional Research	Co-Director	480
Adam Newsted	IT Project Manager	Project Advisor & OIT Lead	240
Sandra Kelly	Associate Director Enterprise Administrative Applications	PeopleSoft and Banner Data integration lead	120
Leonard Peirce	Systems Programmer/Analyst Sr., OIT	Bronco NetID /user authentication programming	8
Derek Diget	Email Administrator, OIT	Email configuration	8
Bruce Paananen	Assist. Director Web Applications	GoWMU integration	8
Teressa Williams	IR BI Developer	Data Mapping	60
N/A	Graduate Assistant	Support	120

IMPLEMENTATION STEERTING & INTERIM GOVERNANCE COMMITTEE

Name	Title	Project Role	Est. Hours
Bundza, Maira	Associate Professor, University Libraries	Implementation Committee	120
Code, David	Associate Director and Professor of Theory, Technology, School of Music	Implementation Committee	120
Du, Yu	Graduate Assistant	Implementation Committee	120
Ghantasala, Muralidhar	Professor of Mechanical and Aerospace Engineering	Implementation Committee	120
Hoinville, Jay	Senior Project Manager, OVPR	Implementation Committee	120
Mansberger, Nancy	Director of Academic Labor Relations	Implementation Committee	120
Newell, Steve	Associate Dean, HCOB	Implementation Committee	120
Sinclair, Gil	Faculty Chair, Aviation	Implementation Committee	120
Springsteen, Kathleen (Cathe)	Assistant Director of Integrated Program Review and Accreditation, Institutional Effectiveness	Implementation Committee	120
Thelen, Sally	Language Specialist I	Implementation Committee	120

Vellom, Paul	Associate Professor of Teaching, Learning, and Educational Studies	Implementation Committee	120
Wagner, Cindy	Senior Marketing Specialist and Webmaster	Implementation Committee	120
Weinreich, Donna	Associate Professor of Social Work	Implementation Committee	120

PROJECT OVERSIGHT TEAM

Name	**Title**	**Project Role**	**Est. Hours**
James Gilchrist	Vice Provost for Budget and Personnel and Chief Information Officer	Executive Sponsor	60
Keith Hearit	Associate Dean, College of Arts and Sciences	Co-Director	
Fen Yu	Director of Institutional Research	Co-Director	
Adam Newsted	IT Project Manager	Project Advisor & OIT Lead	
TOTALS			

PROJECT RISK MATRIX

Risk to the project's success in meeting its objectives and timeline

Catastrophic 5		Low 5	Medium 10	High 15	Catastrophic 20	Catastrophic 25
Significant 4		Low 4	Medium 8	Medium 12	High 16	Catastrophic 20
Moderate 3	Severity	Negligible 3	Low 6	Medium 9	Medium 12	High 15
Low 2		Negligible 2	Low 4	Low 6	Medium 8	Medium 10
Negligible 1		Negligible 1	Negligible 2	Negligible 3	Low 4	Low 5
		Likelihood				
		Rare 1	Unlikely 2	Possible 3	Likely 4	Almost Certain 5

Risk response and mitigation guildelines:

Catastrophic	(20-25)	**Governance & Sponsor:** Emergency assessment of project
High	(15-19)	**Sponsor & Project Manager:** Take urgent action to mitigate risks
Medium	(08-14)	**Project Manager & oversight team:** Plan risk responses and monitor for changes
Low	(04-07)	**Project Manager:** Record and Monitor risks
Negligible	(01-03)	**Project Manager:** Record and Monitor risks

PROJECT PRIORITY MATRIX

This matrix is used by the Office of Information Technology as a guideline for determining the priority of a project considering its business value and urgency as it relates to the University as a whole.

Priorites for Work Orders, Tasks, Projects and Changes.

rev 4/20/17

Priority = Univeristy Value x Urgency

									Normal			EMERGENCY

University Value description	University Value	1	2	3	4	5	6	7	8	9	10	Category
• Extremely Important to most or all customers • Critical to the success of the University	10	10	20	30	40	50	60	70	80	90	EM / 99	**EMERGENCY** System failure Major security breach University at risk of failure
	9	9	18	27	36	45	54	63	72	81	90	**Highest (80-99)**
• Important to many customers • Significant impact on the success of the University	8	8	16	24	32	40	48	56	64	72	80	
	7	7	14	21	28	35	42	49	56	63	70	**High (60-79)**
• Important to a moderate number of customers • Moderate impact on the success of the Univeristy	6	6	12	18	24	30	36	42	48	54	60	
	5	5	10	15	20	25	30	35	40	45	50	**Medium (40-59)**
• Important to only few customers • Minor impact on the success of the University	4	4	8	12	16	20	24	28	32	36	40	
	3	3	6	9	12	15	18	21	24	27	30	**Low (20-39)**
	2	2	4	6	8	10	12	14	16	18	20	
	1	1	2	3	4	5	6	7	8	9	10	**Lowest (01-19)**
	-	1	2	3	4	5	6	7	8	9	10	

(Note: "50" marker appears at University Value 8 / Urgency 7 area; "Normal" points to Urgency 8 column)

Urgency

• Not time constrained • Little to no dependencies	• Moderately time constrained • Moderate dependency of other items on the completion of this item	• Highly time constrained • High level of dependency of other items on the completion of this item	• Extremely time constrained. • Extreme level of dependency of other items on the completion of this task

Uncategorized (hyphen) Default for tasks

NOTE: Defaults for tasks cannot be defined in ITDirect