2.U-2019: Academic Timetabling: Principles, Rules and Responsibilities

1. **Policy**

   The *Academic Timetabling Policy* identifies the key principles and rules that govern the Academic Timetabling process and identify the responsibilities of the Area Chairs as the designated "Academic Timetabler" for each department.

2. **Purpose**

   2.1   To ensure there is consistency across the University in regards to the *Academic Timetabling Process* and that the optimal schedule is produced that meets the needs of the students and faculty, optimizes the usage of teaching spaces, while meeting the demand for course offerings.

   2.2   Our goal is to use our facility in the best possible way by using the full teaching week thereby optimizing space and time. By building timetables annually we are able to:
   - improve the match between available classroom/lab space, course size and preferred teaching space
   - reduce the need for iterative schedule changes
   - accommodate instructor requirements for teaching needs while providing a flexible/balanced schedule for students

3. **Scope**

   3.1   This policy applies to all University Areas and programs.

4. **Definitions**

   4.1   **Academic timetable:** a listing that includes specific course section details, including but not restricted to, the day of the week, time of day, space, location, and instructor.

   4.2   **Daytime Classes:** classes held Monday to Friday between 8:30am and 5:30pm.

   4.3   **Dean(s):** Dean of Arts & Sciences and/or Dean of Education.

Approval Authority	Responsible Office	Effective Date	Date Last Revisited	Review Frequency
Academic Council	Registrar	December 19, 2019		Every 5 years

4.4 **Draft Timetable:** a timetable that has been developed by the Associate Registrar, which is being consulted on and has not officially been published.

4.5 **Evening Classes:** classes held Monday to Friday between 5:30pm and 10:00pm.

4.6 **Exception:** refers to a limitation built into the scheduling system.

4.7 **Instructor:** all those individuals who are instructors of record for a course.

4.8 **Permanent Member:** faculty employed in a tenure or tenure-track position.

4.9 **Policy:** means the Academic Timetabling Policy.

4.10 **Room Characteristics:** a property of each room that describes special features, attributes, or equipment in a room such as scientific laboratory equipment, audio/visual equipment, or computer software.

4.11 **Sessional Member:** faculty employed on a part-time contractual basis. Synonyms include sessionals, sessional faculty, adjunct faculty, and part-time faculty.

4.12 **Students:** individuals enrolled, part-time or full-time, in a course for credit.

4.13 **Teaching Space:** the space used for instructional purposes, including classrooms, subject specific laboratories and other specialized rooms and or spaces. The assignment process should meet the pedagogical and health and safety needs of the course.

4.14 **Timetabling:** the coordination of faculty, courses and physical space, within a defined period of time.

4.15 **University:** means St. Mary's University.

5. **Principles**
   - The *Academic Timetable* is produced annually and the official version is available online at MyStMU.

- To the extent which is possible and with the appropriate approvals, the pedagogical needs of a course should determine the type of time slot used or assigned as well as the classroom/teaching space. (See *Academic Timetable Responsibilities – Deans and Academic Timetablers*).
- The timetable should optimize space utilization so that we maximize the space available in courses to meet student demand while maintaining our commitment to small class sizes.
- The Registrar is responsible for the compilation, release and publication of the *Academic Timetable.*
- To the extent to which it is possible, the timetable should facilitate the widest range of program and course selection for all students.
- The timetable must not conflict with an instructor's other teaching assignments at St. Mary's University.
- All timetabling arrangements for Instructors must conform to the terms of the *Collective Agreement.*
- The timetable should avoid conflicts among required courses necessary for the completion of a specific year level of a program of study at St. Mary's University. This principle is of paramount importance and should supersede the attempt to avoid conflicts among elective courses.
- Whenever possible, the timetable should facilitate the availability of the widest range of elective courses for students. It is understood, however, that the number of elective possibilities offered in any year makes this difficult to achieve.
- To the extent to which it is possible, the inventory of physical space (i.e., class and lab space) and the classroom assignment process should meet pedagogical and health and safety needs of the course.
- Schedule A will contain principles of timetabling relevant to specific programs and will be updated regularly.

6. Basic Rules of Timetabling

6.1 Academic Timetable

Academic course sections will be timetabled within the parameters of the Academic Schedule as defined in the annual *University Calendar.*

6.2 Patterns

The following general parameters will be used to schedule courses:

- Courses at St. Mary's University will be booked in the normal teaching week, from 8:30 am to 10:00 pm Monday through Friday.
- Evening courses should be scheduled in a slot between 5:30 and 10:00 pm.
- Courses offered outside the normal teaching week or slot cannot be scheduled using scheduling software and therefore require specific times to be entered into the scheduling software. (This process is referred to as forced scheduling). **Requests for forced scheduling will be considered on a limited basis and must be requested by the Dean giving clearly articulated reasons for the request, to the Associate Registrar for review.**
- The scheduling process will attempt to optimize the use of academic teaching space using the course size and requirements, the room capacity and features, and preferred teaching space.
- Priority will be given to avoiding timetable conflicts between required, supporting or elective courses as identified by Areas from among their own offerings, as well as those identified by cross-unit consultations.

7. **Scheduling Restrictions**

Scheduling restrictions are necessary to implement the scheduling principles and facilitate the effectiveness of the scheduling process. The spirit of the *Collective Agreement* for Faculty will be respected as follows:

7.1   Institutional Limitations

7.1.1   Permanent Members shall be available to teach between the hours of 8:30 a.m. and 5:30 p.m., Monday through Friday, from September through April.

7.1.2.   Permanent Members will have a break of at least fourteen hours between the end of the last class of day and the start of the first class on the following day.

7.1.3.   Permanent Members will not be required to teach weekend or evenings except by agreement of the member.

7.1.4.   For the fall and winter semesters, Members in the Teaching-Research-Service Workload stream shall normally have one day per week free of teaching responsibilities. Exceptions to this shall not occur for more than two consecutive terms without the express consent of the affected

Member, who is encouraged to consult with their Area Chair and the Faculty Association President when making this decision.

7.1.5. A Permanent Member is entitled to one non-teaching term in each academic year. This term will normally be the spring/summer term.

7.1.6. A Permanent Member may, on a voluntary basis, choose to teach in all three terms.

7.2 Individual Exceptions

An instructor may be scheduled to teach in any daytime pattern unless they request an individual exception due to availability. Exceptions of different types fall under two categories outlined below. Individual exceptions are not provided in perpetuity and must be requested each semester unless otherwise specified by Human Resources. Area Chairs are responsible for ensuring that the appropriate procedures are followed to request the exception as outline below.

7.2.1. Category 1: Legally obligated to Accommodate

Requests may be related to one of more protected grounds under the *Alberta Human Rights Act.* The University is responsible for taking steps to accommodate instructors' needs based on protected grounds to the point of undue hardship for the University.

Formal supporting documentation must accompany an accommodation request.

7.2.2. Category 2: Exceptions

Requests may be made related to personal circumstances that do not fall under the first category. Category 2 requests involve declaring a preference to teaching during one or two time blocks:

- *Morning:* Instructor can be scheduled between 8:30am and 3:00pm, Monday to Friday.
- *Afternoon:* Instructor can be scheduled between 11:00am and 5:30pm, Monday to Friday.

Requests for time blocks and days will also be taken under consideration.

Area Chairs will recommend and Deans will approve a Category 2 request, where deemed appropriate. Exceptions are not guaranteed.

8. **Scheduling Restrictions**

   8.1   **Registrar**

   The Registrar directs the development and publication of the *Academic Timetable* and delegates as follow:

   - Works with Deans to ensure that the needs of the students and programs are kept in the forefront of the timetabling process.
   - Directs issues and makes recommendations related to space allocation and utilization to Deans.
   - Delegates scheduling to Associate Registrar.
   - Performs continual review and improvement of scheduling processes.
   - Conducts room audits and utilization studies in collaboration with the Vice-President Academic and Director of Facilities.
   - Solves short-term space problems caused by unforeseen unavailability of a room, or last minute request to accommodate an activity.

   8.2   **Associate Registrar**

   - Manages the schedule process and oversees the collection of information from Deans.
   - On an annual basis, the Associate Registrar will inform the Deans of the deadlines with regards to the production of the University timetable and will ensure adequate notice and timeframe. The Associate Registrar will also request annually a listing of courses requiring conflict-free scheduling.
   - Creates timetables from the data collected to develop the most effective *Academic Timetable*, in accordance with the established policies and rules.
   - Reviews change requests with the Deans.
   - Informs the Registrar of situations that do not conform to policy.
   - Provides draft timetables to Deans.
   - Creates and publishes final *Examination Schedule.*

   8.3   **Vice-President Academic & Provost**

   - Based on Academic and Strategic Plans, in consultation with the Registrar and Deans sets enrolment targets.

- Approves final *Academic Timetable* before publication.

8.4   Deans

- The Deans will delegate responsibility for timetabling in each Area and program, to the person hereafter referred to as the **Academic Timetabler**. In most cases, it will be the Area Chair. As designated by the Dean, these individuals retain responsibility for timetabling tasks within their academic unit. However, they may delegate some of the timetabling tasks. In cases where delegation occurs, the Associate Registrar will be informed.
- Forwards data from Registrar to Area Chairs. Directs Area Chairs to consult with faculty in their areas to identify area needs and course rotations.
- Works with Area Chairs and Program Coordinators to set parameters, courses and anticipated demand in each year of the program.
- Enrolment caps on individual courses will be set during the timetabling process, with consideration given to pedagogy, supported by evidence, and budgetary constraints.
- Ensures all program requirements, includes minors, concentrations, and specializations will be met for each year of the program.
- Provide a three-year course rotation to the Registrar and the Vice-President Academic.
- Ensures judicious balance between resources (instructors, teaching spaces) within parameters of annual budget.
- Responsible for ensuring all sections are appropriately staffed and the information submitted to the Associate Registrar and Human Resources.
- Communicate course trends and conflicts to Academic Timetabler.
- The Deans will review draft timetable(s) from the Associate Registrar to ensure that the timetabling needs of the Academic Area or program have been met and provide any final requests/feedback prior to release of the timetable to students.
- Advises the Associate Registrar as soon as possible of any needed changes to the published timetable.
- Responsible for communicating the staffing details for all courses to Human Resources using the agreed upon submission format according to the deadlines set out in the collective agreement.
- Maintains records of Full-time faculty teaching loads.

8.5   Academic Timetabler

- The Academic Timetabler will deal with all matters concerning timetabling tasks within the Academic Area timetabling.
- The Academic Timetabler will oversee the collection and analysis of the data required and will forward to the Dean suggested pedagogical needs, suggest the instructor, courses and room information.
- The Academic Timetabler will work with faculty to review course offerings during the past five academic years.
- Review program requirements and identify courses that need to be timetabled for students to fulfill these degree, minor, and concentration requirements.
- Identify the number of sections, labs, tutorials that are likely to be required, given the projected enrolments.
- The Academic Timetabler will attempt to resolve all timetabling conflicts within the Academic Area informally.
- The Academic Timetabler will submit accurate, complete and timely scheduling data to the Dean on all course offerings (courses required, timeslots, teaching space needs, assigned faculty).
- Identifies errors or omissions and reports them to the Dean, Registrar and Associate Registrar during the draft timetable review phase.

8.6   Facilities Management
Maintains general condition of academic space and advises of any changes to the availability of classroom resources.

8.7   Information Technology
Provides teaching and learning technology supports in teaching spaces.

8.8   Team Lead Recruitment and Advising
- Supplies application data to Enrolment Management Team (EMT) to inform development of annual enrolment targets.
- Communicates course request and conflict trends to EMT.

9. Checking of Draft Timetable
The Associate Registrar will distribute draft timetables to Enrolment Management Team and to the Academic Timetablers. The checking of the draft timetable phase is a critical phase over approximately three weeks to verify the accuracy of the timetables.

Consultation with EMT and Academic Timetablers will take place to review change requests made during this period for the following:

- Make a course section Pending.
- Cancel a course section.
- Add a course section.
- Change day, time, teaching space, or instructor.
- Any changes that impact other academic areas or program requirement completion will require all Academic Timetablers and Deans impacted to be informed and an agreement reached before changes are made.

10. Timetable Conflicts
A conflict occurs where two required courses identified with the program degree plan are timetabled at the same time.

The timetable may allow for a conflict between a required course and an approved elective course for a program. This will be avoided wherever possible and every attempt will be made to maximize the choice of a conflict free elective course.

11. Changes made after the timetable has been published online
Students use the timetable to make enrolment decisions that best fit their academic interests as well as other commitments. All changes made after the timetable is finalized will therefore be made only in extraordinary situations.

12. Course Time Changes (Post Registration) *Should be extremely rare
Instructors may not change a course from its officially scheduled time unless the following conditions are met:

- The instructor must first confirm with the Registrar that a suitable room is available at the desired time.
- For the class to be changed there must be unanimous approval on the part of the entire registered class.
- If there is agreement on such change the instructor will confirm with the Registrar.

At the conclusion of each timetabling exercise, feedback is sought to determine any improvements required for the next offering. Faculty and student experience as well as space utilization will be reviewed.

Academic Timetabling Responsibilities

Registrar

The Registrar directs the development and publication of the *Academic Timetable* and delegates as follows:

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Schedule A: PROCESSES AND PROCEDURES FOR ACADEMIC TIMETABLE POLICY

Timelines for the 2020-2021 Academic Timetable (Subject to Change)

End of September 2019	Course enrolment history and enrolment targets will be distributed to the Deans for distribution to Academic Timetablers
October 18, 2019	Academic Timetablers submit timetabling data to Deans for review
October 31, 2019	Once approved by the Dean, Academic Timetablers submit timetabling data to Associate Registrar
January 13, 2020	Associate Registrar will distribute draft timetable to the Enrolment Management Team
January 20, 2020	Associate Registrar will distribute draft timetable to Academic Timetablers
February 7, 2020	Academic Timetablers submit change requests to the Registrar
March 7, 2020	Academic Timetable published for viewing only
April 1, 2020	Registration opens

Timelines for the 2021-2022 Academic Timetable

August 31, 2020	Course enrolment history and enrolment targets will be distributed to the Deans for distribution to Academic Timetablers
October 16, 2020	Academic Timetablers submit timetabling data to Deans for review
October 23, 2020	Once approved by the Dean, Academic Timetablers submit timetabling data to Associate Registrar
January 15, 2021	Associate Registrar will distribute draft timetable to the Enrolment Management Team
January 22, 2021	Associate Registrar will distribute draft timetable to Academic Timetablers
February 5, 2021	Academic Timetablers submit change requests to the Registrar
March 8, 2021	Academic Timetable published for viewing only
April 1, 2021	Registration opens

PROCESSES AND PROCEDURES FOR ACADEMIC TIMETABLE POLICY

Course Scheduling Slots
- **50 minute** teaching blocs are timetabled between 8:30am and 12:30pm Monday through Friday during the day.

- **75 minute** teaching blocs are timetabled from 8:30am to 5:30pm Monday through Friday during the day.

- **150 minute** blocs are timetabled Monday through Friday during the day and evening.
- **150 minute** blocs are timetabled for 2nd year BEd.

Block courses will only be offered during the fall and winter Reading Weeks and the summer term.

Courses will not be offered on Wednesdays during Liturgy unless there are multiple sections of the course offered during the term, thus allowing students and faculty the option of attending Liturgy.

Science Area Timetabling Principles – Subject to Change

Principle	Rationale
Second sections of BIOL 231/233 should be scheduled opposite CHEM 201/203	This allows the seamless opening or closing of additional course sections in response to (un)anticipated enrolment fluctuations.
First year lab sections (CHEM 201/233 and BIOL 231/233) should be "paired" on T/Th or M/W. Second-year labs (CHEM 351/353, BCEM 393, and BIOL 313/311) should be similarly paired.	As nearly all 1st and 2nd year students will take both CHEM and BIOL, this lab schedule uses the fewest overall timeslots per student. (For example, if a student had CHEM lab T at 2:30 and a BIOL lab W at 2:30, they can't take any T/Th or MW courses. But if they have CHEM on T and BIOL on Th, the MW slots are still open).
Multiple lab and tutorial sections should have low soft caps (~12) that rise to the hard cap when necessary	This ensures a roughly even distribution of students in each lab and tutorial section.
Multiple lab sections of the same course must be scheduled in sequence (spanning multiple days is fine, so long as there are no intervening labs in other courses)	This is required to avoid multiple setups/take-downs for the same experiment and is the basis of counting additional lab sections of the same course as one-third the workload of the first one in the lab coordinator workload formula. This also prevents wasting reagents that have limited shelf-lives once prepared or thawed.
The lab instructor must be consulted regarding the scheduling of evening lab sections	Some laboratories (*e.g.,* Ecology) involve significant outdoor work and observation that is neither possible nor safe at night (there is variability here as specific experiments are added/removed, which is why this must be consultative).
No two labs taught can be scheduled back-to-back with no intervening break.	Setup/clean-up duties are required between labs, even if the labs are in the same course.

Psychology Area Timetabling Principles for PSYC 312 A and B – Subject to Change

Guiding Principles:
- Students in PSYC 312A and 312B need to be 'forced' into the corresponding lab that goes with their section.
- For each section, the corresponding lab needs to be held between the two scheduled classes during the week (i.e., if a class runs Tuesday and Thursday, the lab needs to be sometime in between the Tuesday class and the Thursday class).
- As no student can take PSYC 312A and B at the same time, sections of these courses can overlap each other (although only 1 lab section can run at a time due to SPSS only being in 1 lab).

Here is an example of a possible schedule (from 19/20) that fits these principles:

FALL

312A
8:30-9:45 T-Th; 2:30-4:15 T (lab)
10-11:15 T-Th; 9:30-11:15 W (lab)
11:30-12:45 T-Th; 12:30-2:15 W (lab)

312B
10-11:15 MW; 9:30 – 11:15 T

WINTER

312A
10-11:15 MW; 9:30-11:15 T (lab)

312B
8:30-9:45 T Th; 2:30-4:15 W (lab)
10-11:15 T-Th; 9:30-11:15 W (lab)
1:00-2:15 T Th; 12:30-2:15 W (lab)