Humboldt State University

Course Scheduling Working Group Recommendations
February 1, 2013

Preface

As part of the mission of Humboldt State University, classroom facilities are primarily for use by students, faculty and staff for activities and programs that are directly related to the educational functions of teaching, research, and preparation of scholarly material. Every effort should be made to ensure that classrooms are assigned fairly, used appropriately, and accommodate the University's academic and instructional needs.

The recommended protocols are designed to ensure that courses are scheduled in a manner that permits access for the greatest number of students and provides the best match between specific instructional needs of the faculty, courses being offered, and existing facilities. Teaching facilities are a finite resource. The goal of these policies is to maximize room and seat utilization, apply scheduling policies in a consistent and equitable manner, and provide flexibility for our students as they develop course schedules that maximize their progress toward graduation. These objectives and classroom utilization expectations apply to all academic departments and classroom space.

Classroom scheduling is a dynamic process requiring reevaluation of class size, equipment specifications, and pedagogical changes each term. The assignment of a specific room at a specific time in a given term will not automatically guarantee a continuing assignment of that space, even if the room was used efficiently. Faculty members should not expect to use the same space on a continuing basis. (See Appendix A)

Scheduling Rules

1. There are 7 zones. Courses cannot cross between zones. Exceptions:
   · Three hour labs (labs should be scheduled 8:00-10:50AM, 11:00AM-1:50PM, 2:00-4:50PM and 5:00-7:50PM).
   · Clinically based classes or courses based off campus (with approval of the appropriate dean)
   · Graduate Seminars with up to 16 students
   · Classes placed in zones 6-7. Undergraduate seminars or lectures that meet for more than two hours must be scheduled in zones 6 and 7.
2. All courses start on the hour except for 80 minute classes beginning at 7:30 AM. One hour classes may start on any hour contained in a zone.
3. Up to 20% of a department's scheduled hours may be scheduled in **each** of zones 2-5 (total 80%). At least 20% must be placed in some combination of zones 1, 6, 7, Weekend Workshops/Seminars, and wholly asynchronous, online classes. Asynchronous online class hours and Weekend Workshops/Seminars will be counted as though they were face-to-face in terms of seat time.
4. Day of the week patterns are MW, WF, MF, TR, MWF. 4 day per week classes can meet in any four day combination.
5. Meeting hours must be distributed across all days of the week with no more than half of a department's meeting hours on Tuesday and Thursday, subject to room availability. Ten percent of meeting hours must be on Friday.
6. All rules above apply regardless of whether a department or Schedule25 controls a room. Departmental classrooms (instructional labs) must be made available for limited general purpose instructional use.
7. Standing meetings (ICC, Councils of Chairs, University Senate, etc.) must conform to zones.
8. Once assigned, rooms may not be moved without approval of the Academic Scheduler in consultation with the appropriate college dean. After early registration begins, the following changes to the published class schedule require dean's approval:
   · addition of new sections
   · cancellation of scheduled sections
   · day/time/classroom changes
   · capacity decreases/increases.
9. Enrollment history or anticipated increases for a particular course will be used by Academic Scheduling to determine classroom size, so enrollment limits should be carefully reviewed and adjusted. Departments should base estimated enrollments on the actual enrollment during the previous corresponding term, with an estimated increase of no more than 15%. In cases where the department projects a greater than 15% increase, justification must be provided in writing to Academic Scheduling.

Scheduling Zones:

#	Time	Percentage Distribution
1	Before 9:00 AM	Combined with zones 6, 7, weekend & asynchronous online: at least 20%
2	9:00-11:00 AM	Up to 20%
3	11:00 AM- 1:00 PM	Up to 20%
4	1:00-3:00 PM	Up to 20%
5	3:00-5:00 PM	Up to 20%
6	5:00-7:00 PM	Combined with zones 1, 7, weekend & asynchronous online: at least 20%
7	After 7:00 PM	Combined with zones 1, 6, weekend & asynchronous online: at least 20%
	Asynchronous Online	Combined with zones 1, 6, 7 & weekend workshops: at least 20%
	Weekend Workshops/Seminars	Combined with zones 1, 6, 7 & asynchronous online: at least 20%

Resolving Schedule Conflicts
1. The Registrar's Office, in consultation with Institutional Research, academic departments and the colleges will develop a "conflict matrix" that will list all classes which cannot conflict with other classes. This matrix will include major, service and general education courses and be programmed into the scheduling system as much as possible. It is expected that this list of conflicts to be avoided will grow in scope and sophistication over time as departments are made aware of problems and work collaboratively to solve them. Departments and colleges will be provided with reports listing any conflicts that occur.
2. After the schedule has been run, if it becomes clear that major or GE classes need to be moved to better accommodate student enrollment, the deans and vice provost in consultation with department chairs will make adjustments which may result in exceptions to scheduling protocols.

Protocols and Review for Prescheduling Rooms
The Vice Provost will have oversight and approval responsibility for pre-scheduling rooms, in consultation with deans, Department Chairs, the Registrar's Office and, for disabled faculty requests, Human Resources. Applications for prescheduling must be submitted online by Wednesday of the 3rd week of classes. Eligibility for prescheduling will be reviewed yearly. Current room attribute lists will be reviewed and adjusted as necessary. Criteria are as follows:
1. Access to specialized instructional resources or other physical features (e.g., piano, field sample collections, lab stations)
2. Effect of a class on neighboring classes (e.g., sound levels or other possible sources of distraction)

3. Instructor's need for accommodation due to documented disability.

Resolving Room Disputes
The resolution of disputes between classes and rooms will be the responsibility of the college deans or their designees in consultation with the Vice Provost.

Further recommendations
1. A list of scheduling best practices checklists and information will be developed and distributed to the academic departments by the Scheduling Working Group.
2. In addition to the conflict matrix, additional tools should be constructed that will show departments where they need to adjust their schedules to conform to the rules, so that the process can be as automated and intuitive as possible.
3. All classrooms/instructional spaces should be entered into a common database. Scheduling all spaces through a common scheduling software system will document actual usage, with the understanding that there are department centered space needs beyond scheduled classes.
4. Any further explanations and context for policies will be provided as an addendum to course scheduling website by the Office of the Registrar as needed (e.g., priorities and policies for resolving conflicts and rules for reporting use of departmental spaces).
5. Reports that reflect room usage and course availability under the proposed rules will be run as models to provide information for departments about course scheduling and allow for needed changes in the system or rules as the need arises.
6. Other information about rules of room use, including sharing of passing periods, returning rooms to their standard configuration and reporting of broken equipment will be published by the Registrar's Office.
7. The Scheduling Working Group will meet weekly in spring 2013 to oversee and further refine the new scheduling process and protocols.
8. A successor group should meet as needed in subsequent semesters to review scheduling procedures; long term exceptions to scheduling rules granted by the deans in consultation with the Vice Provost; consider feedback from faculty, staff, and students; and recommend changes to the Registrar's Office.

Timelines

The timeline for class schedule build is as follows:

Proposed Timeline

Week	1	2	3	4	5	6	7	8	
Fall 2012 Dates	Aug 20 - Aug 24	Aug 27 - Aug 31	Sept 2 - Sept 7	Sept 10 - Sept 14	Sept 17 - Sept 21	Sept 24 - Sept 28	Oct 1 - Oct 5	Oct 8 - Oct 12	
Fall Timeline	Departments Plan Schedules					Department Data Entry in PeopleSoft			
Spring 2013 Dates	Jan 21 - Jan 25	Jan 28 - Feb 1	Feb 4 - Feb 8	Feb 11 - Feb 15	Feb 18 - Feb 22	Feb 25 - Mar 1	Mar 4 - Mar 8	Mar 11 - Mar 15	Mar 18 - Mar 22
Spring Timeline	Departments Plan Schedules				Department Data Entry in PeopleSoft			Sched 25 Resolutions	Spring Break
New Timeline	Departments Plan Schedules					Department Data Entry in PeopleSoft		Deans' Level Conflict Resolution	
Who	Departments				Deans, Departments	Departments		Deans, Departments	
Deadlines			Requests for Prescheduling Submitted Online (Wed)	Large Lectures/Labs due Friday to Registrar; Scheduling Workbook Data Entry deadline	Deans' Level Conflict Resolution	Large lecture results back (Tues), Peoplesoft data entry due Fri	Monday: Run Audits	Run Sched 25 (Thurs-Fri)	
Other				Roll Schedule (Monday)	Census (Monday)			ICC Deadline (Oct 10)	

Week	9	10	11	12	13		14	15	Finals
Fall 2012 Dates	Oct 15 - Oct 19	Oct 22 - Oct 26	Oct 29 - Nov 2	Nov 5 - Nov 9	Nov 12 - Nov 16	Nov 19 - Nov 23	Nov 26 - Nov 30	Dec 3 - Dec 7	Dec 10 - Dec 14
Fall Timeline	Sched 25 Resolutions		Advising		Registration	Thanksgiving	Registration		
Spring 2013 Dates	Mar 25 - Mar 29	Apr 1 - Apr 5	Apr 8 - Apr 12	Apr 15 - Apr 19	Apr 22 - Apr 26		Apr 29 - May 3	May 6 - May 10	May 13 - May 17
Spring Timeline	Advising		Registration						
New Timeline	Schedule25 Resolutions	Advising		Registration					
Who	Registrar, Departments								
Deadlines	Schedule Online (Fri)								
Other									

Charge to the Course Scheduling Working Group from the Provost:

"Thank you for agreeing to serve on this committee. Effective course scheduling is a critical part of helping our students succeed. In a recent survey of our students, 23% of respondents rated class scheduling as poor or very poor. A cursory look at class schedules shows departments scheduling upper-division major courses at the same time, an unsatisfactory distribution of courses throughout the day and a number of courses off module. Our current policies and practices clearly do not result in a schedule of courses that maximizes students' ability to take the courses they need to make timely progress to graduation. Those policies and practices will remain in effect for scheduling spring semester but will be replaced for scheduling next academic year.

Your charge is to research, develop and recommend a scheduling approach that maximizes students' ability to make timely progress to graduation. While maintaining local control of scheduling at the department level and accommodating faculty preferences for teaching schedules are desirable, they must be secondary to maximizing course availability. You need to strive to find an approach that achieves the latter while maintaining as much of the former as possible. In developing this approach you need to consult with department chairs and ASCs and keep myself and the Vice President for Enrollment Management and Student Affairs informed.

This new approach needs to be in place for fall 2013 scheduling. That means it must be developed, approved and implemented by February 2013. It needs to be reviewed by the University Senate and recommendation to the President by the end of fall semester. To meet this timeline, it should be sent to the Senate Office by November 8th, in time for the November 13 meeting of the University Senate Executive Committee."

Process and additional background for developing these recommendations

Purpose: The Campus Quality Survey, done in spring of 2012 reported that "Approximately 25% of all students reported problems with the convenience and/or availability of required classes." One of the recommendations in the report is to "Assess scheduling of courses and course offerings across majors and classes." Toward that end we seek to ensure that students can register for meaningful full loads each semester they are at HSU. Meaningful in this case refers to the ability to register for classes that satisfy GE or major requirements.

Who we are: The working group included Rick Bruce (CAHSS staff, former Psychology Department coordinator, University Senator), Cheryl Satter (Biology Department coordinator, former department coordinator for Biology and Nursing), Ben Marschke (History faculty member, University Senator), Dale Oliver (Math faculty member and former interim associate dean), Izabella Gray (Academic Scheduler from the Office of the Registrar), John Filce (Institutional Research and Planning representative), Jená Burges (Vice Provost), John Lee (Dean of the College of Professional Studies), and Ken Ayoob (Dean of the College of Arts, Humanities & Social Sciences). Representation was chosen based on scheduling process experience and to include a breadth of viewpoints.

Process: We examined our current scheduling practices, including (but not limited to) lengths and days of various classes, availability/utilization of appropriate classrooms, course start times, timeline for the scheduling process, previous scheduling recommendation documents, and priority scheduling. In addition, we consulted with members of the Registrar's Office at Oregon State University, which has recently gone through a transformation of their course scheduling process, and reviewed scheduling procedures and modules from Oregon State, Cal Poly SLO, CSU Chico, Duke, and University of Oregon. We have been meeting weekly since September 12th.

Guiding Principles:

· Any new system needs to be relatively simple so that rules, times and days can be represented on one page.

· Courses should be distributed relatively evenly across times and days to increase access for students.

· Conflicts between co-requisite, major and service classes must be kept to a minimum.

· Best practices in developing schedules should be identified and distributed to departments.

·   Authority to make accommodations or settle disputes needs to be centered in the College and Vice Provost offices, not in the Registrar or Departments.

·   Once implemented, the system should be subject to yearly review and revision as needed.

After careful consideration we recommend the following procedures, rules, review, timeline and delegation of authority protocols for the course scheduling process. In addition, there are several recommendations for best practices lists, scheduling software and "dry run" testing that could be developed before implementation. This draft report is submitted as a basis for consultation with the University Senate Executive Committee, Integrated Curriculum Committee, Department Chairs, and Administrative Support Coordinators to elicit their feedback before finalizing the report and submitting it to the Provost.

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The recommended protocols are designed to ensure that courses are scheduled in a manner that permits access for the greatest number of students and provides the best match between specific instructional needs of the faculty, courses being offered, and existing facilities.

Teaching facilities are a finite resource. The goal of these policies is to maximize room and seat utilization, apply scheduling policies in a consistent and equitable manner, and provide flexibility for our students as they develop course schedules that maximize their progress toward graduation. These objectives and classroom utilization expectations apply to all academic departments and classroom space.

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Best Practices for Class Scheduling

·   Start early. This is a new process and there may be questions along the way.
·   Do not schedule the courses that your students may want/need to take in any given semester at the same time.
·   If other departments provide courses that your students need/want to take, coordinate with those departments to ensure that those classes are not scheduled in the same time slot.
·   When a tentative schedule is ready, post the draft schedule for students to review and

comment upon.

- Due to high demand for classrooms, please avoid scheduling zero-enrolled sections in zones 2-4.
- Schedule multiple sections of a course into different timeslots.
- Don't assign all the classes in Zones 1, 6, and 7 to lecturers.

Scheduling FAQs

WHY WE ARE DOING THIS

My department and our students have never had a problem with scheduling our major courses. Why must we change now?

Student success is a priority, and central to that mission is ensuring students can enroll in the courses they need to graduate in a timely manner. Approximately one-quarter of all students reported problems in the convenience or availability of required courses in a recent campus survey. The new scheduling regime is designed to reduce conflicts across campus. Your students also need GE courses offered by other departments, and your department also offers courses for your minor program and GE courses to non-majors. These changes are designed to reduce barriers to timely graduation for students.

I have a better idea. Why didn't anybody ask me?

This was vetted widely across campus. A Scheduling Working Group has been developing this proposal for several months. The Group solicited input from across campus and was comprised of faculty, staff and administration. All ideas presented to the group were thoroughly discussed and considered before making final recommendations were forwarded to the Provost.

The administration can't just tell us when we can offer classes, can they?

Scheduling rules and protocols are an implementation issue, not a policy issue. The Scheduling Working Group was comprised of faculty, staff and administration and the recommendations were made by consensus.

Why did you reduce the number of two hour class periods?

The number of two hour periods is the same as before. I thought there were more.

Why didn't you set the zones on the half-hour, i.e., 8:30-10:30, 10:30-12:30, and so on?

For the sake of simplicity, and to make Zone 1 more appealing, the zones are set on odd numbered hours.

Why didn't you set the zones on even numbered hours, i.e., 8:00-10:00AM, 10:00AM, and so on?

Setting the zones on odd numbered hours opens more attractive time slots.

There are only three "prefered"2-hour slots in the old system (10:00-11:50 AM, 12:00-1:50 PM, 2:00-3:50 PM). Now there are four (9:00-10:50 AM, 11:00 AM-12:50 PM, 1:00-2:50 PM, 3:00-4:50 PM). Zones 2 and 4 may not be ideal, but we anticipate that they will be more popular than 8:00-9:50 AM and 4:00-5:50PM.

How do we know this will work?

We examined scheduling models and policies at several other institutions and learned others found that a system of non-overlapping time zones had improved student course selection and scheduling efficiency. Various time zone schemes were considered and sample groups of classes fit into them to find the optimal scheme which would minimize student class conflicts, better utilize facilities, and distribute classes more evenly across the day. We will be continually analyzing the outcomes and comparing efficiencies as implementation proceeds.

DISTRIBUTION ACROSS THE ZONES

Does this mean I must to teach at 8:00AM and after 5:00PM?

No. Your department must schedule 20% of scheduled class meeting hours before 9:00 AM (Zone 1) and after 5:00 PM (Zones 6-7) or asynchronous on-line/distance. It's up to your department to decide who teaches then.

What happens if my department can't agree on who will teach in Zones 1, 6, and 7?

If your department does not meet the zone rules, your department will not be put in for room assignments and none of your department's classes will get any rooms. Department chairs ultimately decide on teaching assignments and schedules.

We only offer a few classes and it's impossible to meet the scheduling rules for zones and days. What do I do?

Schedule your courses across days and zones—no more than 50% on Tuesday/Thursday, not all during zones 2-5.

How will "scheduled class meeting hours" be counted to determine percentage distributions across the zones?

Each course must have a certain amount of seat time. Each hour of seat time will count for an hour during that zone; half hours will count for an hour in that zone, also, because they are blocking that time for other courses. Asynchronous online courses will count the equivalent seat time (e.g., a traditionally 3-day-per-week, one-hour-per-day course that is asynchronous online will count for 3 hours in the asynchronous online zone).

Will there be an easy way to know if my department's proposed schedule is in compliance with the rules?

Yes. Once your department coordinator enters the days and times in the scheduling workbook, they will be able to generate a report that will show percentages. Additional reports will be provided for verification of the schedules after all data is entered into PeopleSoft, the system of record.

My department has rooms for major classes. Do classes scheduled in our own room have to follow the same rules as classes using shared university rooms?

Space conflicts/utilization is only one component of scheduling. Your students take other courses in other departments, and scheduling your courses across zones could prevent them from taking other courses in other departments. Students who have minors and only need one or two courses within your major will also be negatively affected by courses crossing zones.

FITTING IN THE ZONES

I have worked to get to exact percentages but have found it to be impossible. What should I do?

There is some flexibility given the complexity and variation of class meeting lengths. Departments which have come close to meeting the percent requirements but find it impractical or impossible to meet them exactly should consult their dean for an exception in consultation with the Vice Provost.

Can I still offer a course that fit in an old module, even if it doesn't fit in the new "zones" (like 8:00-9:20 AM, 10:00-11:50 AM, 12:30-1:50P M, or 4:00-5:50 PM)?

No. The zones are to reduce the number of conflicts across the university, and a single exception can cause conflicts for students.

Why can't I offer a class 9:30-10:50? It's still within Zone 2. Why must 80-minute course meetings start on the hour?

To keep scheduling rules as simple as possible, we decided that all classes start on the hour.

How do three hour labs fit in the zones?

They don't. As before, labs should be scheduled 8:00-10:50A M, 11:00 AM-1:50 PM, 2:00-4:50 PM and 5:00-7:50 PM. The appropriate length of time (one hour or two hours) will apply for the length of time in the zone to calculate zone percentages.

What if it is absolutely impossible for my department to schedule its classes in keeping with the rules?

Talk with your dean who has the authority to make exceptions in consultation with the Vice Provost.

Doesn't it waste classroom space to have classrooms sitting empty for a half hour when 80-minute classes are scheduled in 2-hour zones? Wouldn't it be better to have 80-minute time slots?

Our priority was to eliminate scheduling conflicts. The cost of the "wasted" time is easy

outweighed by the benefit of having 80-minute and 110-minute class meetings on the same schedule.

SCHEDULING CONFLICTS

How do I know if I am scheduling a class that will conflict with another course that prospective students may want take?

We are creating a conflict matrix that lists classes that potentially shouldn't conflict. That can be crosschecked with the proposed days & times in the scheduling workbook your department coordinator has access to.

How do I know what other courses should not be scheduled at the same time as mine?

A comprehensive list of these conflicts is being created.

CLASSROOM ASSIGNMENTS

How do I make sure that I'm scheduled to teach in a specific classroom?

Although you cannot guarantee that you will be able to use a specific classroom, you may complete and submit the "pre-scheduling request" form if you need a specific classroom because of a disability, because of noise issues, or because of learning materials.

What if my department and another department both want the same room at the same time?

Your dean or the vice provost will decide.

What if my department and another department both want to schedule co-requisites at the same time? Who decides which of us moves?

Your dean or the vice provost will decide.

Are we stuck with this in perpetuity?

The Scheduling Working Group will continue to meet to evaluate the process and recommend changes as needed.

MISCELLANEOUS

What happened to the old "Science Matrix"?

CNRS will generate a new one that fits the new zones.