



**TO:** Senate

**FROM:** Catherine Lu, Terry Hébert

**SUBJECT:** Question Regarding Changes to Class Scheduling Parameters

**MEETING DATE:** November 20, 2013

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**PREAMBLE:** Whereas University faculty were presented on October 11 (via email on a University-wide list serve), two documents issued by the Deputy Provost of Student Life and Learning, pertaining to new course scheduling parameters,

Whereas we sympathize with the difficulties that Enrollment Services face when scheduling classes for students and teaching times for professors and instructors, given the complexity of program requirements and the limitations on available class space on campus,

Whereas teaching is one of professors' primary responsibilities, which also include research and service commitments, as well as various personal responsibilities,

Whereas an effective and legitimate resolution to the challenge of classroom scheduling must be based on evidence that identifies the nature and causes of the problem, with a view to constructing the most appropriate solutions,

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**QUESTION:**

1. What empirical evidence indicates that the current difficulty with course scheduling is primarily due to university-wide faculty unavailability rather than, for example, egregious patterns of abuse in specific units, special challenges in scheduling large classes, and/or overly complicated program requirements, any of which would call for alternative, targeted, or 'smart' solutions to the identified problem?
2. McGill is a research-intensive, student-centred university. Research and teaching activities have distinct time requirements. What is the justification for prioritizing course scheduling at the expense of research (see p. 4 of the October 11 document)? Is the University meaning to relegate research to a lesser priority, and are faculty expected now to do research *only after* the needs of teaching (and service) have been fulfilled?

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3. McGill has recently gone through a period of academic renewal and is a much younger place as a result. Many of our newer colleagues have young families. Under the new policy, a parent will no longer be able to both drop off and pick up children (p. 4 of the October 11 document). How can this new policy be justified given the legitimate needs of faculty to fulfill their parental obligations to their school-age children?

4. Why was this new policy not subjected to wider consultation, scrutiny, and debate? Given its universal effects on working conditions of faculty, why was the MAUT Council not properly consulted before the release, much less implementation, of the new policy? Why did the Deputy Provost of Student Life and Learning fail to present the October 11 document for discussion and endorsement in Senate?

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# McGill University Class Scheduling Parameters

## October 11, 2013

### Introduction

McGill has now had three years of experience with coordinated scheduling, resulting in some success. However, we are still facing some fundamental challenges that have a direct negative impact on

- students' ability to graduate on time;
- the use of unused space for research purposes;
- the availability of pedagogically appropriate space; and
- the availability of space for graduate students.

Other issues include:

- inequities in the distribution of classes across the day and week;
- inequities in departmental schedules, and
- clustering of courses between 10:00 and 14:00, Monday through Thursday, leading to major constraints on student choices of classes.

This document should be considered as phase 3 of the Class Scheduling Project. The original Class Scheduling Project's principle objective was to implement software that would allow for coordinated class scheduling and would take into account various constraints in order to produce the most optimal class schedule possible and give students more choice. Phase 1 was a pilot project on Macdonald Campus for the 2007-2008 academic year followed by phase 2 on the downtown campus for the 2010-2011 academic year. While both phases were successful and fully implemented and continue to meet the basic requirements for the production of McGill's class schedules, there remain the key issues noted above that must be resolved and are addressed in this document.

### Objectives

In response to the problems identified above, these Class Scheduling Parameters should ensure that McGill's scheduling practices:

- **enhance students' accessibility to classes** needed to graduate, by optimizing the distribution of class instructional times;
- **effectively support professors in their access to instructional and research space;**
- **support the repurposing of space for research and other scholarly activities;**
- **support fair and equitable distribution** of instructional time and space;
- **effectively support chairs, directors, and deans in their implementation of scheduling.**

## Principles

1. Optimization of students' academic experiences: The class schedule should ensure that courses required for graduation are available and accessible.
2. Pedagogy as a driver: The class schedule should be designed to meet the pedagogical needs of courses and programs.
3. Research and teaching priorities: Space may be allocated for teaching, research, and other purposes, and the class schedule must be optimized to provide for the fulfillment of these activities.
4. University ownership of instructional space: Instructional space is a valuable resource that belongs to the University as a whole and will be shared and allocated to support the broader teaching and learning needs of students and faculty as well as other University activities.
5. Academic stewardship of instructional space: The Provost is the steward of instructional space and is responsible for ensuring that it supports the academic needs of the University.
6. Fairness and equity: Instructional space and time will be allocated to achieve fair and equitable distribution across disciplines.
7. Transparency and collaboration: Units should work together in a collaborative and transparent manner in order to resolve class-scheduling conflicts.
8. Confidentiality of conversations between instructors and their chairs, directors, or deans: Discussions concerning reasons for constraints on the availability of an instructor's teaching time will remain private and confidential unless released by an instructor when appealing a decision.

## Goals

Class scheduling will balance a number of constraints, including the handling of academic program requirements within the limitations of teaching space and the number of available instructional hours.

1. Scheduling will place a priority on facilitating learning, maximizing access to courses for students, and enabling students to reach their educational goals.
2. Scheduling will provide access to courses needed for timely completion of programs.
3. Scheduling will reflect the need for different pedagogical approaches, such as different class durations and meeting patterns, depending on the discipline and level at which a particular course is taught.
4. The University will endeavour to schedule classes to enable faculty members to balance their teaching, research, service, and other University activities.
5. Classes will be scheduled across all days of the week (Monday – Friday) to maximize use of campus classrooms and minimize class conflicts for students.
6. Optimizing the convenience of instructors with back-to-back classes and, when requested, optimizing students' transfers between core courses within programs.

## Definitions

Instructional space: For the purpose of this document, instructional space is defined as any physical location used for approved, scheduled classes. Examples of instructional space include, but are not limited to, lecture theatres, seminar rooms, classrooms, and teaching laboratories.

Teaching time: Monday to Friday, 8:30 to 17:30 (to 21:00 for the School of Continuing Studies) are **normal** teaching times. It may be necessary for Enrolment Services to schedule undergraduate and graduate classes in the evening, as, for example, in the following:

- Courses difficult to schedule otherwise
- Courses requiring space for brief portions of the term (e.g., as part of a practicum in a professional program)

Exceptionally, teaching time may also include Saturdays and Sundays for some programs.

## Who controls instructional space at McGill?

The University controls all instructional space, and the Provost is its steward. All instructional space is to be added to the central database [Banner and TPHi (Infosilem)]. Enrolment Services will schedule courses and classrooms centrally for all schools and faculties, excluding courses that are part of the Medicine and Dentistry professional programs. The ad hoc scheduling of space will also be managed using the central database and functionality.

Classrooms and other instructional spaces may be allocated periodically to individual academic units, but the assignments are not permanent. Although academic units would have priority in such classrooms, they do not have exclusive use of them. The space may be reallocated as the needs, priorities, and demands of the Faculty, School, or University change.

## Roles

The creation of the class schedule requires the coordinated efforts of individuals across the University: Provost, Deputy Provost (Student Life and Learning), students, deans, chairs/directors, instructors, and administrators in academic units and Enrolment Services responsible for scheduling. The roles and responsibilities of each of these individuals or groups of individuals are outlined in Appendix A.

## Prioritization

### Course and program requests

The following requests will be accommodated:

1. Course combinations – a list of courses that must not conflict or be offered on the same day for academic or pedagogical reasons
2. A series of special presentations given by non-University community members may require avoiding scheduling at certain times of the week to maximize students' availability to attend and benefit from the special lectures.

No other special course and program requests such as conferences or optional tutorials will be accommodated by Enrolment Services during the initial scheduling cycle.

Other elements that are taken into account in scheduling of classes are outlined in Appendix B.

### Requests from instructors

As a general rule, classes will be scheduled within a 45-hour span of each week (8:30 to 17:30, Monday to Friday). It is understood that professors conduct research for many hours each week and have to balance that academic duty with their teaching load and other responsibilities.

Due to the complexity of balancing space limitations, student limitations and instructor limitations, classes will be given scheduling priority over other University functions.

Course and program restrictions and combinations requested by a department will take priority over instructor restrictions.

The following limitations on teaching time will be the only ones the chair will have the authority to accommodate:

- Human rights accommodation, which must be offered in certain circumstances, unless doing so will cause undue hardship to the University. Examples that may have implications for the time and/or place of teaching include disability, pregnancy, and religion. (Please refer any questions to Human Resources.)
- Official academic or administrative responsibilities that require an instructor's attendance (e.g., Senate meetings)
- Academic responsibilities (e.g., standing meetings for specialized research collaboration, involving parties inside and outside McGill; constrained access to specialized and shared laboratories for research)

The University will do its best to accommodate a full day of research if it is requested and approved by the chair, director or dean.

Childcare-related requests will be accommodated, *if possible*, but will not be approved for an instructor for both the beginning and end of the day.

### Appeal process:

In exceptional cases, an exception to the rules can be made. Exceptions will be arbitrated by the Deputy Provost, after a recommendation from the chair and the dean.

### **Authority**

Chairs have the authority to assign work, to decide if requests from instructors that limit their availability for teaching are acceptable, and to determine if acceptable limitations should be assigned priority under the following guidelines. Enrolment Services determines whether the approved requests can be implemented without compromising the scheduling goals of the University. If not, the Chair is advised that the request cannot be met. Disputes between the instructor, Chair/Director and Enrolment Services regarding approval of special requests that limit time available for teaching are to be addressed by the Associate Dean or Dean and may be referred to the Deputy Provost (Student Life and Learning).

## Appendix A

### Roles

#### Provost

- Stewards all instructional space at McGill.
- Is responsible for all decisions regarding the use of space on the two campuses, including rendering decisions regarding proposed changes to the use of space.
- Considers advice from, and is responsible for, the Teaching and Learning Spaces Working Group.
- Ensures students' needs and student-centeredness are considered in allocating instructional space at McGill.

#### Deputy Provost (Student Life and Learning)

- Arbitrates significant disputes regarding the use of space at McGill.
- Stewards the Class Scheduling Parameters.
- Ensures students' needs and student-centeredness are considered in allocating instructional space at McGill.

#### Deans

- Are responsible, in collaboration with directors, chairs, and the University Registrar, for ensuring that all instructional space:
  - is included in the central database [Banner and TPHi (Infosilem)];
  - is used efficiently through the promotion and adoption of the University's Class Scheduling Parameters.
- Designate responsibility for the oversight of scheduling coordination within each Faculty, normally to the Chairs/Directors of academic units, but possibly to an Associate Dean.

#### Chairs, Directors, and Deans of Faculties without Departments

- Ensure, in collaboration with Deans and the University Registrar, that all instructional space:
  - is included in the central database [Banner and TPHi (Infosilem)];
  - is used efficiently through the promotion and adoption of the University's Class Scheduling Parameters.
- Assign teaching responsibilities to instructors, taking into account their other academic duties, such as research.
- Review and render decisions regarding requests for limitations on teaching availability from instructors and for programs (course combinations and other pedagogical requirements), ensuring the decisions are consistent with the Class Scheduling Parameters and are submitted to Enrolment Services by the specified deadline.
- Assign scheduling coordination responsibilities within the academic unit.
  - Encourage and provide time for the person to attend training and process streamlining sessions with Enrolment Services.
  - Provides the person timely access to approved instructor availability forms.
- Liaise with Enrolment Services to problem solve as the need arises.
- Hire course sessional instructors in a way that optimizes their availability across a 45-hour week.

**Instructors**

- Identify, and communicate to their chair/director/dean, by the deadline, technology and classroom configuration requirements for their courses as well as serious constraints that may limit their availability for teaching according to the Class Scheduling Parameters.
- Work closely with chairs/directors and scheduling coordinators in their academic units to resolve any problems or conflicts that arise.
- Ensure that classes start and end at their formally scheduled time.
- Report any changes in class locations to their department.

**Students**

- Are responsible for choosing a schedule that reflects the academic requirements of their program.

**Person responsible for schedule coordination in the department**

- Collaborates with chairs, directors, and deans of faculties without departments, and Enrolment Services to:
  - record all instructional space in the central database [Banner and TPHi (Infosilem)];
  - use space efficiently through the promotion and adoption of the University's Class Scheduling Parameters.
- Discusses and resolves, in consultation with Enrolment Services, problems that arise around scheduling.
- Maintains accurate room locations for classes within Banner.
- Consults with the academic advisers in their units regarding course conflicts and sequences.
- Validates class schedule drafts, especially with reference to the details of the academic program and whether the schedule will work for students.
- Problem solves, in collaboration with Enrolment Services, to resolve any conflicts, disputes, errors, or other challenges that emerge during the scheduling process.
- Informs Enrolment Services by appropriate deadlines of any changes that arise that will affect the class schedule.
- Attends training regularly.
- Streamlines and enhances practices as new tools and technology become available.

**Enrolment Services**

- Stewards the class scheduling technology.
- Coordinates the collections of scheduling requests and requirements for courses, programs and instructors.
- Creates the official class schedule and allocates instructional space for each class.
- Stewards and manages the scheduling software, including identifying enhancements and collaborating with IT to implement new technology.
- Provides annual reports to monitor the distribution of classes.
- Provides training and documentation to the community of scheduling coordinators in the academic units.

## Appendix B

### How will the classes be scheduled?

1. Credit-bearing courses and courses with CEUs, their exams, and required class events have scheduling priority over all other activities that require the use of teaching space.
2. Allocation of instructional space will be based on the following:
  - As much as possible, the pedagogical needs of courses will determine the type of rooms assigned, if requests have been submitted and approved by the chair/director/dean.
  - Each year, the scheduling requests expressed by all academic units will drive the allocation of space, so courses will not necessarily be scheduled in the same room from year to year.
3. The class schedule will make full use of days and times across the work week, and classes will be scheduled as follows:
  - a. Classes will normally be scheduled Monday to Friday
    - Undergraduate and graduate degree courses will normally be scheduled from 8:30 to 17:30, but it may be necessary for Enrolment Services to schedule undergraduate and graduate classes in the evening, as, for example, in the following:
      - Courses difficult to schedule otherwise
      - Courses requiring space for brief portions of the term (e.g., as part of a practicum in a professional program)
    - Continuing Studies courses will normally be scheduled from 18:00 to 21:00.
    - Scheduling practices will accommodate programs that are designed specifically for weekend delivery, such as the EMBA.
  - b. The following patterns, which are designed to promote flexibility and avoid class conflicts within academic programs, are used without exception for courses based on a 3 x 1 or 2 x 1.5 pattern :
    - 3 X 1 hour
      - Monday, Tuesday and Thursday (MTR)
      - Monday, Wednesday and Friday (MWF)
      - Tuesday, Thursday and Friday (TRF)
    - 2 X 1.5 hours
      - Monday and Wednesday (MW)
      - Tuesday and Thursday (TR)
      - Wednesday and Friday (WF)
  - c. For the same reasons, classes are scheduled within three blocks during the day (8:30 to 11:30, 11:30 to 14:30, and 2:30 to 17:30) and must not span two blocks.
4. Whenever possible, instructors will not be required to teach courses continuously for more than three hours or to teach more than two different courses back to back.
5. Courses that have not received full governance approval will not be scheduled.

## Appendix C

### Resources

- Scheduling Coordinator tools: <http://www.mcgill.ca/classschedule/schedulingtools>
- Mandate of Teaching and Learning Spaces Working Group (TLSWG):  
<http://www.mcgill.ca/tls/spaces/tlswg>
- Quebec Charter of Human Rights (particularly Chapter I.1, 10):  
[http://www2.publicationsduquebec.gouv.qc.ca/dynamicSearch/telecharge.php?type=2&file=/C\\_12/C12\\_A.html](http://www2.publicationsduquebec.gouv.qc.ca/dynamicSearch/telecharge.php?type=2&file=/C_12/C12_A.html)

*Quebec Prohibited grounds:* race, colour, sex, pregnancy, sexual orientation, civil status, age except as provided by law, religion, political convictions, language, ethnic or national origin, social condition, a handicap or the use of any means to palliate a handicap.

- Canadian Human Rights Act (particularly 3. (1) and 3. (2)):  
<http://laws-lois.justice.gc.ca/eng/acts/h-6/page-1.html#h-3>

*Canada: (1) Prohibited grounds:* race, national or ethnic origin, colour, religion, age, sex, sexual orientation, marital status, family status, disability and conviction for an offence for which a pardon has been granted or in respect of which a record suspension has been ordered.  
(2) Pregnancy or child-birth - Ground: sex

Changes to class scheduling  
Draft memo – to Chairs and instructors  
October 10, 2013

Dear Colleagues,

My purpose in writing is to ensure you are aware of the new Class Scheduling Parameters that will inform the creation of the fall 2014 and winter 2015 class schedules. The Parameters were developed over spring and summer 2013 by a working group chaired by the former Deputy Provost (Student Life and Learning), several department chairs, associate deans, representation from Teaching and Learning Services, and administrative support from Enrolment Services. They were approved by the deans in October 2013.

McGill has now had three years of experience with coordinated scheduling, resulting in some success. We have made some progress but are still facing the unusual challenges.

McGill offers about 10,000 courses per year (fall and winter). There are 3,083 course combination rules involving between 15,000-18,000 course 'instances' due to a large number of courses that are implicated in many rule-sets (course combinations). For example, Physiology 201 can be included in the microbiology, nursing, physical therapy, occupational therapy, and science course combinations. Similarly, Mathematics and Statistics courses are taught to students outside the department across the University. Ultimately, departments rely on each other's course offerings to satisfy degree requirements.

As you can see, the scheduling process is complex. Even more so, considering that in the fall, fall/winter, and winter semesters of the 2013-2014 academic year, instructors identified thousands of hours during which they were not available to teach. This, along with the intricacy of the scheduling process, creates a great strain on the system, especially on students' ability to graduate on time and on the use of space for teaching, research, and other purposes. The class schedule must be optimized to provide for the fulfillment of these activities. Implemented well, these Parameters will ensure that we are in a position to release more space to be used for these purposes.

The attached Scheduling Parameters are designed to address these issues.

You may be wondering how this will affect you. Briefly, the Parameters articulate how requests for exceptions and preferences will be prioritized and whether they will be approved. For example, requests from departments to ensure that specific courses in an academic program do not overlap will usually be accepted and integrated into the schedule. However, requests that would have the effect of limiting instructors' availability to teach will be approved in more limited circumstances than has been the case until now. The Parameters limit the degrees of freedom the chairs will have for approving requests that reduce or place restrictions on an instructors' teaching availability.

With fewer restrictions, classes may be scheduled throughout each day and week. This will ensure a fair and equitable distribution of instructional space and time. The details of the prioritization are found on page 4 of the attached document. The Parameters address very special circumstances that will necessitate flexibility and also provide for an appeal process.

We understand that these parameters may generate some tensions. They will however also enhance the student experience, decrease inequities in departmental schedules and allow for the identification of unused space which can be reallocated for research purposes.

We hope that by being transparent about our class scheduling practices and the way decisions will be made that the outcome will be an improved class schedule for all. We also truly hope this process will not create undue pressure on any of you. However, our institution is now so complex, its needs are so large and so different across programs, departments and faculties that a more ordered scheduling process is vital to our ability to move forward and keep up with the top institutions in the world.

The class scheduling exercise has begun and Enrolment Services has held its annual meeting with departmental representatives to review the new parameters and to solicit input. The Minerva forms are now open for instructors, chairs and directors. If you have any questions about the Class Scheduling Parameters, please contact Kathleen Massey, University Registrar and Executive Director of Enrolment Services ([kathleen.massey@mcgill.ca](mailto:kathleen.massey@mcgill.ca)) or Anna Walsh, Associate Registrar, Enrolment Services ([anna.walsh@mcgill.ca](mailto:anna.walsh@mcgill.ca)) directly.

Regards,

A handwritten signature in black ink, appearing to be 'Ollivier Dyens', written over a faint, light-colored signature line.

Ollivier Dyens  
Deputy Provost (Student Life and Learning)