

The University of Minnesota Academic Calendar Conversion
A Retrospective Personal Commentary
by
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1) UM “Conversion” Expenditure Budget

- a) Amount
- b) Categories
- c) Source of Funding

We spent \$3.7 million over four years on personnel and other items. Note that this does not include student system expenses. As you probably know we planned for and put in a new student system (PeopleSoft) over the same four years of our semester conversion project. The change to semesters was not the reason for the new student system. Like many other peer campuses that also put in new systems, our old systems (we had two) had become harder and harder to maintain, and the Y2K fix alone was estimated at about \$7 million. We could have done the calendar change in three years. The choice of a four-year schedule was mostly because we knew it would take four years to put in the new student system.

It is probably not possible for us to give you a good estimate of semester-driven student system expenses. It would be significant, but certainly not the \$30 million we spent on the new student system.

As for other expenses, we spent \$300,000 to print some of the last round of quarter college bulletins to last three years, rather than two. I supported two additional staff members in the Office of the Registrar. I hired two additional staff and two students workers in my office. We compensated faculty who had to work during the summer of 1997 on review committees. And the largest expense (\$1.7 million) was for colleges to hire additional advising help (mostly graduate students) the year prior (FY99) to our first semester year (FY00). Faculty and staff were not compensated for any of their additional, semester-related work during the regular academic year.

2) UM Curriculum Restructuring

- a) Faculty compensation (see above)
- b) Administrative assistance

The project on all four campuses was managed centrally by me and four colleagues in the Office of Institutional Research and Reporting (Caroline’s office at UCLA). The location of the project in IRR was a happy accident. For the first year of the project I was actually an associate vice president in the Office of the VP for Academic Affairs. I became the director of the IRR office the following year and took the project with me. The reason I say this was a happy accident is because two of my IRR colleagues were the University’s experts on pulling information out of our old student systems, and one of the most valuable forms of administrative assistance we provided to colleges and departments was all of the detail about the courses and programs that they had to change.

We provided tons of information to various other groups (e.g., calendar options to the Senate Committee on Educational Policy, which had responsibility for designing the semester calendars for each campus).

A critical task was developing and communicating a 4-year schedule for the project and then holding everyone to it.

Most importantly, my colleagues Scott Murdoch and Cynthia Macaluso created our “Semester Conversion Information System,” a database with a great Web front end that enabled us to provide colleges and departments with complete information about their quarter-based courses and programs and enabled them to submit all of their new semester-based information electronically. Scott and Cynthia are the true heroes of our semester conversion project. I cannot possible overemphasize the importance of doing this electronically. All of our semester information was simply dumped from our database into PeopleSoft, when the new system was ready. And this information was also used to feed all of the new bulletins. In addition, the system greatly facilitated our communications effort about what had to be done with respect to semester courses, for example. The information you had to provide was clear on the electronic form, and if you did it wrong you got “beeped.” Also, whatever information was in the system at any given point in time was always the most current version, so no one was flying around trying to find the most recent piece of paper.

c) Degree program requirements

For the most part we did a very straightforward conversion (e.g., 180 quarter credit undergraduate degrees were converted to 120 semester credit degrees with more or less the same requirements). We had just redone our liberal education requirements; so the key was to preserve the new requirements in converted form, not change them.

As you know, at places as large and comprehensive as UCLA and the Twin Cities campus there are usually significant curricular changes going on in a college or department in any given year. One campus (Morris), one college (Dentistry), and departments here and there chose to rethink and redo their degree program requirements in a significant way, as part of the semester conversion, but most simply converted what they had. Overall curricular change was not an objective of the project. There was too much else to do.

d) Course catalogue size – “Before” and “After”

We actually did reduce the number of active courses by one-third, from about 21,000 to about 14,000. You do have to do this.

e) Transformation of previous year-long, engineering or science-based “sequence” courses from three-quarter format (Chem 10A, 10B, 10C) into two-semester format (Chem 10A, 10B)

Actually there are many other kinds of year-long sequences (e.g., modern languages) and these are the easiest kind of courses to convert. Three courses become two, with half of the winter quarter course material going to the fall semester course and half going to the spring semester course. What to do with single quarter courses is the problem. If you are going to reduce the number of courses, you really need to scramble the eggs with these. For example, if on quarters you have three Shakespeare courses—comedies, histories, and tragedies—and on semesters you can only have two, what do you do? Put the comedies with the histories? Eliminate the

comedies? Divide the plays into two groups by date? Or if you have three unrelated stand-alone courses, one will have to go, with the material moved elsewhere or abandoned.

The only real problem with the year-long sequences is keeping students on track, if they are currently able to start the sequence in any quarter. We advised student well ahead of time to make sure they completed such sequences before the change to semesters. In one or two cases (e.g., calculus) we offered a semester version of the third quarter calculus course during the first fall semester as an extremely small “transition curriculum”—just for those students who did not heed our very loud advice.

3) UM Faculty and student reaction – 2001-02 compared to 1998-99

- a) **Quarter calendar – greater variety permitted under quarter calendar vs. shortcomings in learning process**
- b) **Semester calendar – more comprehensive teaching/learning process vs. difficulty to catch up if student falls into academic difficulty (probation, etc.)**
- c) **The age-old issue – which calendar is better for the learning process**

We do a “student experience” survey every other year. In the spring of 2001, near the end of our second year on semesters, we asked those students who matriculated on quarters which calendar they preferred. The results were 55% quarters and 45% semesters. What surprised me about the results was the consistency across all four campuses and all student levels (i.e., undergraduate, graduate, first-professional), not the result itself. You would think that perhaps one student group or one campus might have preferred semesters.

I do not have comparable information for the faculty, who were always split about 50/50 over the 25 years or so that the University periodically considered a change in calendars. Peter Hudleston and Steven Rosenstone should have good insights about how they feel now.

With regard to which calendar is better, I can only offer this non-helpful advice: “I don’t know.” I grew up on semesters as an undergraduate student, a graduate student, and a faculty member, so I regard semester calendars as natural and quarter calendars as deviant. I am not a semester zealot, however. Obviously very high quality and very complex institutions can operate on either calendar (e.g., UCLA-quarters and UC, Berkeley-semester). Quarter calendars are much more flexible (e.g., more course choices for students, arranging a term with no teaching assignments for faculty). Semester calendars are much less hectic (e.g., you only start and stop terms twice). Disciplines that can slice and dice the curriculum into small pieces tend to prefer quarters, and disciplines that commonly require project work or term papers prefer semesters. Some campuses have a preponderance of one or the other, but most do not. Flip a coin. And then there are things like medical schools, which operate more or less year-round on their own unique cycles and seem able to adjust, indifferently, to any calendar.

With regard to faculty and student opinion I hold the heretical view that it does not really matter much. What matters most is what is in the best long-term interest of the campus. Obviously faculty members should have a strong voice in determining this, but their personal calendar preferences are rather irrelevant. I believe that the calendar is never a consideration when students are deciding what school to attend. And I doubt that the calendar is a factor when faculty members decide whether or not to accept a job offer. You tend to just accept whatever calendar the campus uses and you adjust.

4) UM Faculty sabbatical leave policy – conversion from quarter to semester

We had on quarters both a full-year sabbatical leave at half-pay and a single quarter leave at full-pay. On semesters we have a full-year sabbatical leave at half-pay and a single semester leave at full-pay. The major difference is that we offer fewer single semester leaves, both because of the cost and the impact on departments, especially small departments, of trying to cover teaching assignments.

5) UM Student academic counseling challenges

There are really two different kinds of challenges. The first is to be able to tell every single student exactly what they need to do to graduate in a timely way. We invested a lot of time and effort in this, because it was certainly one of our highest priorities. The effort included the development of Program Completion Plans (PCP's) for most undergraduate majors. Time is an important factor. Our students had a full year to look at the new curriculum before the first fall semester and position themselves for the change (e.g., decide whether to complete a liberal education requirement on quarters or semesters).

The second challenge is the student course load or credit load problem. I have just browsed your curriculum briefly, but it looks as though students can take a full load of at least 15 credits with just 4 courses (even just 3, in some cases), since most of your courses seem to have a credit value of either 4 or 5. If you were to convert your curriculum in the usual way you would move from a quarter-based curriculum of mostly 4-credit and 5-credit courses to a semester based curriculum of mostly 3-credit and 4-credit courses. And students who are accustomed to taking 3 or 4 courses per term would have to take 4 or 5 to get at least 15 credits per semester. Getting students to accept this change is a major challenge. I spent most of my time during the last two years fighting this problem and designing a new undergraduate tuition structure for the Twin Cities campus. For the first three years on semesters we have used a "half-price discount for all credits over 12" model on the Twin Cities campus, but next year we are moving to a straight 13-credit tuition band. In addition, beginning this fall students will be required to register for a minimum of 13 credits. This requirement will be phased in over four years, beginning with new freshmen and transfer students.

Student credit load was a particularly important issue for us, because even on quarters average student credit loads were never good and graduation rates, as a consequence, were (and are) low in comparison to our peers. Dean Rosenstone will undoubtedly give you an earful on this subject. He was one of my main allies in arguing for a new tuition policy.

6) UM Summer Session calendar – changes and enrollment impact

We changed from two five-week summer sessions on quarters to one eight-week summer session on semesters. In addition we have a three-week "intersession" or "May term" that is counted as part of summer session. The latter experiment was designed to permit instructors and students to participate in an intensive experience with just one course—an experience that might also involve travel or a field experience. It is comparable to the "J-terms" that are common in small, private liberal arts colleges. The verdict is still out.

Summer Session Enrollment on all four campuses is relatively unchanged at about 21,000.

7) UM Teaching Workload statistics – 3 Years later

This is a very difficult issue and I do not have good data about it. There are 19 colleges on the Twin Cities campus (not counting the Graduate School and the College of Continuing Education, which do not have their own faculty), and each supposedly has its own teaching load policy. Here is what I believe happened, using four colleges as an example.

- In the College of Liberal Arts the teaching load on quarters was probably 2-2-1 for most faculty members and on semesters it is probably 2-2, for most.
- In the Institute of Technology the teaching load on quarters was probably also 2-2-1 for many faculty members and on semesters it is probably 2-2, but there were probably also a significant number of faculty with a 2-1-1 load who are now 2-1, because of the size of their research programs and the number of graduate students they work with.
- In the College of Education and Human Development the teaching load on quarters was probably 2-2-2 for most faculty members and on semesters it is probably 2-2, for most.
- In the College of Biological Sciences the teaching load on quarters was probably 1-1-1 for most faculty members and on semesters it is probably 1-1, for most. Ahem.

At a macro level the teaching load for a campus should not change because of a change in academic calendar. You have the same number of faculty members teaching the same number of students who are taking the same number of credits per term. But at various micro levels some change is inevitable, and many faculty members who on quarters had to teach two courses for just two quarters now have to teach two courses for the entire academic year. Even though the credit value of the four semester courses may be the same or even less than the credit value of the five quarter courses, they regard this as an increase in their teaching load.

In retrospect I could have been more helpful about all of this. I would have tried to focus the conversation on “different” rather than “increase or decrease.” For example, even though you have to teach two courses for the entire academic year, the courses meet only three times a week rather than four. Or, on semesters you only need to start and stop four courses a year rather than five.

Peter Hudleston (IT) and Steven Rosenstone (CLA) will be your best source of information about all of this. I should add that the only real “noise” on this issue was in CLA, not surprisingly. CLA was also the college most affected by one of the academic standards adopted by the University Senate: a course for X credits must have at least X contact hours. On quarters, many CLA departments and also mathematics and computer science in IT had a lot of 4-credit courses that met only 3 times a week. As best I can tell all of the noise, which was never very loud, has quieted down. Life goes on.

8) UM Student Workload statistics – 3 Years later

See notes in 6) above.

Here are the average credit load numbers for undergraduate students for the fall of 1998, the last year on quarters, the fall of 1999, the first year on semesters, and the fall of 2001, the most recent year on semesters.

	<u>Fall 98</u>	<u>Fall 99</u>	<u>Fall01</u>
Twin Cities	13.4	12.8	13.3
Duluth	14.9	14.2	14.4
Morris	15.7	15.1	15.3
Crookston	15.0	14.0	14.0

The drop on the Twin Cities campus from Fall 98 to Fall 99 was actually less than what is shown. On quarters we had two registration systems, the main system for all four campuses and a separate system for the College of Continuing Education. When we moved to the new system about 1,500 students who had been registered through CCE in the Fall of 98, most with low average credit loads, were now being counted as degree-seeking students. If you adjust for these students the actual drop on the Twin Cities campus was from 13.4 in the fall of 1998 to 13.0 in the fall of 1999.

9) UM Records System Conversion

- a) **Administrative systems**
- b) **Student Systems**

See notes in 2) above. Sue Van Voorhis will provide some valuable insights. The change to semesters had no real impact on our HR and finance systems.

10) UM Process

a) **Faculty Senate**

The University Senate played a large, significant, and appropriate role in the semester conversion. And it is not often that I say that about the Senate and Senate committees.

We created two semester committees. One was a large, "everyone is represented" taskforce that met infrequently and was never really useful. The second was a small steering committee that was very effective. It was jointly appointed by the VP for Academic Affairs and the chair of the University Senate. Four members were selected by the VP and four by the Senate chair. One of the Senate members was an undergraduate student and the other three represented the Senate committees on educational policy, faculty affairs, and finance and planning. As a group we developed the list of "everything that needs to be done," assigned responsibility for the various tasks, and developed the implementation schedule. Some of the most critical tasks were assigned to Senate committees. Most importantly, the Senate Committee on Educational Policy (SCEP) was assigned full responsibility for the development of the semester calendar and the development of the academic standards that everyone had to follow—subject only to final approval by the full Senate.

SCEP got off to a somewhat wild start—"we should demand that the State Fair change its dates or move to a new location!"—but they wound up doing an excellent and thoughtful job. I worked very closely with SCEP, especially on calendar issues and options, but I tried not to be too heavy handed. I suppose the weight of my hands might be a matter of some debate. SCEP was very ably chaired by Professor Laura Koch. After the first year, when SCEP had finished most of its work, I hired Laura as the associate director for the semester conversion project, and she handled all of the advising strategy and work. She also was a member of the steering committee.

Laura has remained in the central administration and is currently director of our first-year experience programs. I had hoped that you could meet with Laura and also another member of the steering committee, Chuck Speaks, who is now chair of the Senate Finance and Planning Committee, but they will both be on vacation August 9.

b) Academic unit – down to departmental level

Our communications plan was simple, but effective. Each Twin Cities college and the Duluth, Morris, and Crookston campuses was asked to name a semester coordinator and I was pretty firm about dealing only with them. All colleges and campuses had to follow the academic standards approved by the Senate, our implementation schedule, and use our semester conversion information system for submitting all course and program information. How they organized all of this work within their units was up to them, however. There was a lot of variation at the college and department levels, with some relying heavily on a few eager volunteers and others relying on committees.

The review of the new curriculum was conducted only at the college level, with just two exceptions, since the University and the Twin Cities campus in particular do not have university-wide or campus-wide curriculum committees. The Graduate School insisted on reviewing all 8000-level courses (went fine); these are courses and seminars for just graduate students. And all courses that can be taken to satisfy our liberal education requirements had to be approved by the Council on Liberal Education (quite messy).

11) UM Campus Impacts

During the four years of planning for the semester conversion and doing all the work (FY96-FY99) we had three different academic vice presidents, two different presidents, installed a new human resource system, in addition to a new student system, and implemented a new responsibility-centered budgeting system (IMG) that allows colleges to keep all the tuition revenue they generate. We also brought a new steam plant on-line and sold a \$300 million hospital. And then there was the Board of Regents failed attempt to impose major changes in our tenure policy, which led to a faculty unionization effort that nearly succeeded. In addition, we planned for and began work on more than \$500 million in various construction projects. Today, 21 of the 22 deans on the Twin Cities campus (including the deans of the Graduate School and the College of Continuing Education) are new since FY96. So too are most of the chairs of more than 125 academic departments.

I mention all of this just to make the point that it is hard to isolate the impact of our change in calendar, given everything else that was going on. All in all the University of Minnesota is a much better place than it was seven years ago, although the change to semesters is certainly not the major (or maybe even a major) reason for that.

a) Budgetary

Our tuition revenue was basically flat in FY00, the first year on semesters, with the drop in credit loads wiping out any additional increase in revenue because of the annual tuition increase. We had expected this, and it was not a problem. Since then our tuition revenue has been fine.

On quarters we always experienced an 8 percent drop in student credit hours between the fall and winter quarters and an additional 8 percent drop between the winter and spring quarters,

both because of students dropping out and because of average student credit loads eroding. On semesters we experience just an 8 percent drop between the fall and spring semesters. This has served to minimize any loss in tuition revenue because of the drop in average student credit loads. This is also why the semester calendar will be of some help in improving retention and graduation rates.

b) Academic departments

I believe that most handled the change in calendar without any problem and have adjusted just fine. IMG (the new budgeting system) has probably been a bigger deal than the new calendar.

c) Administrative offices

Our administrative offices were not much impacted by the change in calendar. The implementation of the new HR and student systems was a much, much bigger deal that tied some of them up pretty good. When President Yudof began in FY98 we were already halfway through the semester project, and he never paid any attention to it. That was the old guy's initiative and the new guy had other things he wanted to do. He did pay attention to the system changes, however, because of the cost (about \$60 million total for both).

d) Student Service offices

Our student services offices, both centrally (e.g., registrar and financial aid) and at the collegiate level were hit really hard during FY99, the last year on quarters and especially during the "short" summer of 1999, when they lost their traditional 3-4 weeks of down time between the end of summer session and orientation and the start of the fall term. We also had a really tough time with the new student system during the first year on semesters. PeopleSoft was vaporware when Minnesota, Michigan, Wisconsin and a number of other peer campuses chose it and the student finance part of the system was a mess when it arrived late. We could not bill for tuition or award final financial aid packages until November.

After the first semester and especially after the first year most things have worked quite smoothly. The burden on student services offices is less hectic with a semester calendar. To the extent that we have residual problems they are system related, not semester related.

e) Business Affairs offices (bookstore, etc.)

The bookstore lost about 20 percent of its revenue. The one advantage of semesters for students is that they pay less for books. The bookstore anticipated this change, however, well-ahead of time and adjusted without any problem.

Our regular academic year, from the first class day in the fall to the last exam day in the spring, is 10-12 days shorter than the academic year on quarters. This does affect parking, food service, housing, and so forth.

We made a point of including our business offices in all semester communications from the very first day and had all of them do a careful review of their processes and procedures to see what might be affected (e.g., revenue changes, contracts with vendors, etc.). They took this very seriously and planned accordingly and adjusted.

f) Intercollegiate athletics

Intercollegiate athletics welcomed the change in calendar, especially the football team, which had its costs reduced significantly (i.e., about three weeks worth of extra room and board costs). Some spring sports had their costs increase, of course, but not by nearly as much as the savings in football. The only real other accommodation might have involved some slight revision of schedules to avoid the new exam periods.

12) Looking Back -- What were the major items that:**a) Went according to plan**

Most things.

b) Did not work well and should have been done differently

I think our calendar is problematic, and I wish I had pushed hard for 70-day semesters (note that Michigan has had 65-day semesters for a long time). As it is we try to get as close to 75 days as possible. We always have 74 days in the spring and the fall varies between 71 and 74, depending on when Labor Day falls, but in order to get these days the last exam day is usually December 23, which is not good. I suspect that eventually we will make this change.

We should have kept a closer eye on all undergraduate degree programs. Some departments took advantage of the situation and increased the number of courses in their departments required for a degree. This behavior was inspired in part by the new budgeting system, which allows colleges to keep the tuition revenue they generate. This has not been a major problem, but it has required some post-change review in order to reel the offenders back in.

c) Were major surprises

The great cooperation and lack of whining on the part of faculty and staff was a major surprise. They were real troopers.

One of our objectives was to have a single undergraduate bulletin for the Twin Cities campus on semesters, rather than a separate bulletin for each of 14 undergraduate colleges as was the case on quarters. In order to achieve this, which we did, it was necessary to standardize a lot of undergraduate policies and practices that varied by college (e.g., academic probation, residency requirement, dean's list, etc.)—the sort of thing that is often “red tape” for students and that is usually boilerplate at the front end of a bulletin. This took a lot of work that we did not envision, but it was well worth the effort.

d) Should not be overlooked

Every student, faculty member, and staff member will be affected in some way—some in personal ways (e.g., traditional vacation plans, day-care arrangements in late August or early September). Area businesses may be affected because the regular academic year is shorter.

Do not underestimate the importance and difficulty of scheduling the first semester. Course schedules are usually the same from year to year—one fall term is more or less like another. But when you change calendars you really have to start from scratch and make sure you give priority to the really core courses (e.g., chemistry lectures and labs).

Think very carefully about the course load you will expect students to maintain on semesters and the credit value of semester courses.

Make sure it is "ready, aim, fire" and not "ready, fire, aim." It is very important that people do not jump the gun. Make sure your objectives, schedule, communications plan, and so forth are all clearly understood before you say "Go!" I spent most of my time in FY96 on the semester project but remarkably little time after that. This was our mobilization year. During this year we made a really good snowball, took it up to the top of a big hill, and aimed it very, very carefully. Then we gave it a little push down the hill and it got bigger and bigger and bigger and there was little we could do to change its course.

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