Report of the 2001
Ad Hoc University Calendar Committee
The Ohio State University
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Executive Summary

In December 2000 the University Senate convened the University Ad Hoc Calendar Committee, which was asked to examine the issues involved in a calendar conversion to semesters and to make a recommendation about whether to proceed. The Ohio State University's Academic Plan notes that only 15 of 88 Research I universities use the quarter calendar, and makes the claim that a conversion to semesters would give students more time for in-depth study, ease the transfer process, provide efficiencies, and save money.

The committee has reviewed the conversion to semesters at other universities that have recently made that change, we have sought input from the Ohio State community, and we have done an analysis of the potential costs and benefits of a change to semesters. Our conclusions are presented in reports of four subcommittees: the Dissemination Subcommittee, the Resources Subcommittee, the Faculty Issues Subcommittee, and the Student Issues Subcommittee.

The committee found no evidence of the unqualified superiority of one calendar over the other. A search of the research-based literature turned up virtually nothing on the pedagogical pros and cons of semesters versus quarters; despite some claims of the superiority of the semester system for teaching and learning, there is little research-based evidence. At Ohio State, the perceived pedagogical merits of the different calendars vary: whereas some individuals and departments favor a conversion to semesters, others are just as adamant that quarters are superior. Semesters are perceived to be an advantage in courses that require an extended time for research and writing, or to digest and master material. Quarters are perceived to be more flexible, providing more opportunities to teach highly specialized courses and providing a greater diversity of courses, and less subject to the potential tedium of the longer term.

For the purposes of estimating the impacts of a calendar conversion, it was assumed that Ohio State would be adopting a semester with fifteen weeks of instruction and one week of exams. Fall semester was assumed to run from mid August to mid late December, and spring semester from early January to early May. We assumed an eight-week summer semester, with the possibility of a three- to four-week “minimester” between spring and summer semesters. The committee has also considered the possibility of half-semester courses to increase the flexibility of course offerings under a semester system. The actual details of a semester calendar, in the event that Ohio State does convert, would be left to the Council on Enrollment and Student Progress (CESP).

Dissemination

The Dissemination Subcommittee was formed to educate the university community, to identify critical issues, and to gauge university opinion about a possible conversion to semesters. We established a website, www.osu.edu/calendarstudy, featuring schedules of events and reports of the experiences of other universities.

The committee sponsored a one-day conference that featured speakers from universities that had recently converted to semesters—Cleveland State University, University of Georgia, Michigan State University, and the University of Minnesota.

The committee volunteered to meet with each college faculty and met with every group that expressed an interest. We also met with student and staff groups. Although these meetings gave
some sense of the wide range of opinions within the university, we are unable to draw from them any conclusions about the degree of support for a conversion to semesters. The committee was interested in conducting a scientific poll of issues related to a possible semester conversion, but funding was not available.

Resources
The Resources Subcommittee conducted an analysis of the expected impact of a conversion to semesters, including both fiscal and space outcomes. The Academic Plan projects that a conversion to semesters would save the university money, but the Resources Subcommittee determined that there were no significant short- or long-term fiscal benefits in converting to semesters. Although continuing administrative costs are projected to be lower under semesters, the cost savings would be marginal when compared with the university's administrative budget.

There are certain short-term costs in converting to semesters, but Ohio State is already committed to some of these expenses, regardless of the choice of calendar. Some examples:

- A new Student Information System (SIS) has already been planned for the university, at an estimated cost of $50 million. Although the current system could be adapted for a semester system, the cost of such reprogramming could be saved by not converting to semesters until after implementing the new SIS.
- It is anticipated that a significant amount of unreimbursed faculty time will go into a conversion to semesters, but estimator of the value of this time have varied considerably. In addition, the university is concurrently undertaking an undergraduate curriculum review that will require major curricular revisions even if semesters are not adopted. It is difficult to separate out the value of faculty time that would be invested in a calendar change, beyond this curricular review and normal, routine revisions of curricula.

Although it does not involve an additional cost to the university, we note that a conversion to semesters would involve teaching starting earlier in the year, in August rather than late September. We recommend that Ohio State pay faculty contemporaneously with work performed, with salary payments reflecting the earlier start date.

There is a concern that incentive-based budgeting would encourage departments to "poach" courses and expand their majors during a conversion to semesters. One solution is an expansion of the oversight role of the Council on Academic Affairs (CAA), but such oversight will prove to be difficult during a calendar conversion when all university courses are being reviewed and revised.

Other institutions have experienced a decline in enrollments and student full time equivalences (FTEs) in the years immediately following a conversion to semesters, following an enrollment spike immediately prior to conversion. Because of Ohio State's capped full-time tuition fee and the multi-year averaging formula for state subsidy, it is expected that a drop in FTEs would have a smaller negative financial impact than that experienced by other institutions. Although a worst-case scenario would be very damaging, with a well-planned conversion, the outcome should be revenue neutral.

It is anticipated that instructional costs would increase if Ohio State converts to semesters. Ohio State currently offers a large number of five credit hour courses, many of which will probably be replaced with three or four credit hour courses under semesters. With students needing to take
more courses at any given time for a full-time load, either faculty teaching load (in terms of number of courses) must increase, or class sizes or wait lists must increase, or more instructors will have to be hired. Since increases in teaching loads would negatively impact research, and increases in class sizes or wait lists would negatively impact quality of instruction, the goals of the Academic Plan would seem to dictate that more instructors be hired. The additional instructional costs would be distributed unequally across the university, concentrated in the regional campuses and those colleges where five credit hour courses are the norm.

Faculty Issues
The Faculty Issues Subcommittee investigated the impact of a conversion to semesters on faculty teaching loads and research opportunities, the impact on staffing needs and class size, and the impact on faculty and graduate student recruiting and retention. The recommendations of this subcommittee were guided by principles of neutrality: a conversion to semesters per se should be neutral in terms of faculty workload and research support; the intellectual content of programs and the total instructional hours offered by programs should not be adversely affected; and class sizes should not be increased in classes that currently have enrollment ceilings. Indeed, a conversion to semesters may be looked upon as an opportunity to improve in all these areas.

One of the greatest concerns expressed by faculty about a conversion to semesters is that teaching loads will be increased. Most units in the university use the number of courses taught as the measure of teaching load, and if this were used in converting to semesters, a neutral conversion would mean reducing by one third the number of courses taught per year per faculty member. Teaching loads could be adjusted over a three-year period to make any teaching load conversion neutral for this 2/3 courses per year model.

With budget restructuring, in units where a high percentage of five credit hour courses are converted to three or four credit hour courses, there will be financial pressures to increase the number of courses taught by a faculty member to keep up the number of credit hours or contact hours. While we recognize that workload can be measured in different ways, we believe that the 2/3 courses per year model will in most cases be the optimal conversion standard.

In some cases, converting to semesters may require additional staff. If this means hiring lecturers or GTAs rather than regular faculty, there will be a reduction in the percentage of courses taught by regular faculty—a change that runs counter to the broad goals of the Academic Plan.

The impact on teaching loads for Graduate Teaching Assistants (GTAs) is also complicated. If a one course per quarter teaching load were converted to a one course per semester teaching load, then there would be problems staffing courses with capped enrollments that offer several sections each quarter, resulting in a 50% increase in the number of sections taught each semester. The shortfall could be addressed by increasing GTA teaching loads, moving GTAs from other courses, or hiring more GTAs or faculty. On the other hand, changes in requirements in the general curriculum could also change the need for some GTA-taught courses.

Research opportunities can be affected by a conversion to semesters. The 2/3 courses per year conversion model is neutral in terms of time available for research. If, however, that model is modified, then research could be negatively impacted.

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Funding for Special Research Assignments (SRAs) and Faculty Professional Leaves (FPLs) of less than one year will be affected by a calendar conversion, since it will cost 56% more to buy fifteen weeks of release time than ten weeks. Although a faculty member would receive the benefit of more release time, the number of SRAs and FPLs would decrease without the infusion of additional funds.

A survey of deans of colleges at recently converted universities overwhelmingly indicated that a conversion to semesters had no perceptible effect on the ability to recruit or retain faculty or graduate students.

Ohio State is currently undergoing a curricular review, including credits-to-graduation requirements and the General Education Curriculum. If we convert to semesters, the conversion should be coordinated with the curriculum review. We would anticipate that many units would use a conversion to semesters as an opportunity to completely revise their curricula. If the conversion does not take place at this time, it should not be considered again for a substantial period of time.

Student Issues

Based on polls of students at Ohio State, it appears that most undergraduates would not like to change to semesters, whereas most graduate students do favor semesters.

Students who are present at the time of a conversion to semesters will experience a drastic restructuring of courses. Translation of credit-hours and course requirements for graduation will become muddled. Full-time students will be expected to take more courses at a time, and experience at other institutions has been that many students initially do not take enough courses to keep their credit hours at a level adequate for timely graduation. There will need to be resources put into advising and advertising to smooth the transition.

There are some areas where Ohio State students are perceived to be at a disadvantage because of the quarter system. Some Ohio State students have difficulty competing for jobs during the summer or after graduation because of our calendar. Professional corps are similarly affected. Also, since virtually every school outside the United States is on semesters, and 85% of US schools are on semesters, more of the cooperative programs for foreign study are scheduled for semesters and place Ohio State students at a disadvantage.

Several other student issues have been identified. Some of these are:

- The lengthened commitment represented by semesters may have a negative impact on the enrollment of part-time students and certain other groups of students.
- The cost of tuition and fees for each semester will be greater than the cost for each quarter.
- Based on experience at other institutions, the total cost of textbooks can be expected to drop.
- There will be a decrease in diversity of courses and perhaps availability of courses under semesters.
- The pace of courses under semesters will tend to be slower.
- Transferring to Ohio State from a semester institution will be simplified if Ohio State is also on semesters.
Recommendations
The subcommittee reports include a number of recommendations that have been accepted by the committee. Included in the resolution below are those recommendations that the committee believes are critical to an implementation of a semester calendar.

Resolutions
The following resolution was approved by a vote of 11 to 4:

The Ad Hoc Calendar Committee recommends that The Ohio State University commence planning for the implementation of the semester calendar and follow the recommendations below:

- That conversion take place only when there are adequate financial resources available.
- That teaching loads for faculty and GAs not be increased as a result of the conversion.
- That any conversion be used as a catalyst for rethinking and reengineering our curricula and that the timetable for any conversion allow adequate time for this to occur.
- That additional resources be provided for advising students before and during the transition.
- That graduation requirements be liberally interpreted for students enrolled during the transition.
- That the new Student Information System (SIS) be fully functional prior to a switch to semesters.
- That one semester be counted the same as one quarter currently is for the purposes of SRAs, sabbaticals and other leaves.
- That flexibility within the semester system be built in to accommodate such diverse programs as 7 week courses, mini-terms, etc.
- That CESP develop specific dates for the semester calendar that includes 15 weeks of instruction with one week of exams and a summer session that accommodates P-12 teachers.
- That we pay faculty and graduate assistants contemporaneously with work performed, with salary payments reflecting the earlier start date.
- That no "unfunded mandates" be imposed.

The following resolution was approved unanimously:

If, after all deliberations are completed, the university decides to convert to semesters, the committee unanimously supports the above list of recommendations.

Summaries of Important Issues
In this report, the Ad Hoc Calendar Committee has weighed the relative merits of quarter and semester calendars, and has endeavored to give a balanced analysis of the costs and benefits of converting to semesters. Although we found no evidence of the unqualified superiority of one calendar over the other, a majority of committee members nevertheless voted to recommend that the university commence planning for the implementation of a semester calendar.
The vote of each committee member was cast only after a careful evaluation of the issues raised in this report. It is impossible, in the space of a few paragraphs, to adequately present rationales for these votes, but in this section we do attempt a brief summary of important issues identified by some committee members.

Some among the majority have cited advantages of a semester calendar, including a more relaxed pace of instruction, with fewer starts and stops, more opportunities for in-depth study and research, and more time available for writing and revising papers. According to some of the committee, semesters can also provide improved opportunities for innovations in teaching. The quarter system is seen by some as being too inflexible to accommodate instructional needs in certain subject areas, whereas a semester system can have the flexibility to accommodate even the needs of subject areas more suited to a quarter system.

Also cited in support of a switch to semesters is that this is the calendar of most research universities, and that there are benefits that would accrue from conformity with other institutions, such as more opportunities for student employment, internships, and study abroad. The recent trend has been for universities with a quarter calendar to convert to semesters, and there is a sense amongst some on the committee that it is inevitable that Ohio State would eventually follow that trend. If so, the timing is right for such a conversion, with a major revision of OSU’s curriculum and the implementation of an integrated Student Information System (SIS) already planned. Indeed, some on the committee view a conversion to semesters as providing added impetus to critically study and revise the curriculum, and note that the same degree of change would not be possible without the conversion.

Amongst the minority, some have cited the lack of proof that we will be better off pedagogically with a semester calendar. Although there may be advantages in some areas of study and for some students under a semester calendar, it is equally true that other areas and other students are better served by having a quarter calendar. Some have also argued that semesters are less flexible than quarters, particularly with regard to research time, and that the university would be sacrificing the flexibility of the quarter system should we convert. Some on the committee feel that the perceived advantages of a semester calendar do not justify the costs, and present the risk of diverting significant resources needed to support the Academic Plan. Moreover, there is concern about the complicated and potentially harmful interaction of budget restructuring, curriculum revision, and a calendar change.

There is concern amongst the faculty as to how a conversion to semesters would impact teaching loads and research opportunities, and additional concerns amongst the student body about the impact of a conversion. It has been noted by some that faculty and students have not called for a conversion to semesters; rather, the proposal has come from the leadership of the university, with assertions about the benefits of a semester calendar. In the view of some members of the committee, there is no strong evidence supporting these assertions, and the objectives of the Academic Plan would not be enhanced by a conversion to semesters.
Introduction

Charge to the Committee
In December 2000, at the request of President Kirwan, the University Senate convened the University Ad Hoc Calendar Committee. This committee was asked to examine the issues involved in a calendar conversion to semesters and to make a recommendation about whether to proceed. Specifically, the charge to the committee was to:

- Identify the issues related to calendar conversion from quarters to semesters.
- Review the processes undertaken at comparable universities that have recently made such a change, and study those universities who have recently considered such a conversion but decided to remain on the quarter system.
- Seek input from the Ohio State community, as appropriate, to access the attitudes and preferences of students, faculty, staff and administration toward calendar conversion.
- Identify the major areas of cost and benefit accompanying the calendar conversion at Ohio State University. Analysis of costs and benefits should include financial, human and program elements.
- Coordinate closely with the ad hoc Undergraduate Curriculum Review Committee throughout deliberations, and report their recommendations to the Steering Committee of the Senate the results of the Committee's study by April 30, 2001.

The deadline for the recommendations report was later changed to May 15, 2001.

Committee Membership
Appointed to the committee were the following faculty, students, and staff:

Chair: Grady W. Chism, Department of Food Science & Technology
Joseph T. Barr, College of Optometry
Julie Carpenter-Hubin, Resource Management Systems & Institutional Analysis
Steven S. Fink, Department of English
Martha M. Garland, Department of History, Academic Affairs
Beth Greene, Council of Graduate Students
Donald R. Haun, Department of Economics, College of Social & Behavioral Sciences
Kenneth W. Kwochka, Department of Veterinary Clinical Sciences
David M. Lieberman, Undergraduate Student Government
James J. Mager, Office of Enrollment Services
Brian W. McEneis, Department of Mathematics, Ohio State University at Marion
Brad A. Myers, Office of the University Registrar
David L. Stetson, Department of Evolution, Ecology, Organismal Biology
Margaret M. Strow, Colleges of the Arts and Sciences
Sharon A. West, School of Journalism/Communication
Why Consider a Change to Semesters—And Why Now?
The Ohio State University's Academic Plan sets forth a series of initiatives and a resource plan designed to take the University to a higher level of performance. Particular emphasis is placed on improving the organization and delivery of instruction. In part, the Plan calls for a reexamination of our academic timetable and our undergraduate curriculum. Noting that only 15 of 88 Research I universities use the quarter calendar, the Academic Plan posits that a conversion to semesters would give students more time for in-depth study, ease the transfer process, provide efficiencies, and save money. Furthermore, the Plan suggests that the extensive and complex General Education Curriculum, which was appropriate for an open-admissions university where many students arrived with educational deficits, may no longer be appropriate for today's better-prepared students and notes that a thoughtful redesign of the curriculum may best be accomplished as part of a quarter-to-semester shift. At the request of President Kirwan, the University Senate appointed an Ad Hoc Curriculum Review Committee to look at the General Education Curriculum.

Additionally, the Academic Plan calls for a new Student Information System (SIS). Coordinated by the Office of Academic Affairs, the SIS Project is a multi-department, university-wide effort aimed at enhancing student services support through improved data and the electronic sharing of that data. The new SIS will replace the present legacy system first developed in the 1970s and is a top priority whether the University community chooses to move to semesters or remain on quarters. If Ohio State converts to semesters, however, planning and implementation of the new SIS and the calendar conversion must coordinated.

In sum, then, this is the context for discussion of semester conversion at this time: 1) the Academic Plan points to semester conversion as facilitating the improved organization and delivery of instruction; 2) some part of the curricular revision necessary for a calendar shift would be required anyway should it be decided to redesign the General Education Curriculum; and 3) replacement of the Student Information System should be coordinated with major academic shifts such as the potential calendar change.

Parameters, Constraints, and Definitions
Semester: While it is true that most universities, and especially the vast majority of research universities, use the semester calendar, it is not the case that they all use the same semester calendar. Among our benchmark institutions and within the Big Ten, semester calendars range from 70-76 actual classroom meeting days (holidays not included) with additional days for reading and examinations. For academic year 2000-01, full semester at those institutions began as early as August 21st and as late as September 5th, with the last day of exams falling between December 9th and 23rd. For the same academic year, spring semester at benchmark and Big Ten institutions began as early as January 8th and as late as January 22nd, with the last day of exams falling between May 4th and May 18th.

The Ohio Board of Regents defines the academic semester as being "of sixteen weeks duration with not less than fifteen weeks devoted to instruction" (Rule 3333-04). Discussions with OSOR staff and the practice of other Ohio public universities lead us to believe that some

1 The Ohio State University Rules of the University Faculty currently state that "[f]or any college on a semester basis, the university year shall be divided into a summer session of approximately twelve weeks and two semesters of approximately eighteen weeks each." The OSU College of Law, which operates on a semester calendar, is in session for sixteen weeks, including reading and examination days.
flexibility does exist with regard to this rule. For the Ohio public universities using the semester calendar, instruction time is just under fifteen weeks, with actual classroom meeting days ranging from 69 to 74. Semester calendars within the Ohio public institutions are fairly standard. For most, fall semester 2000 began August 28, with exams ending about December 15th and spring semester began on January 16th with exams ending about May 11th.

Given the OBOR semester definition and the calendars of the other Ohio public universities and the benchmark and Big Ten universities, the Ad Hoc University Calendar Committee assumes the following throughout this report:

- Fall and spring semesters would be approximately fifteen weeks in length with approximately fifteen weeks devoted to instruction and one week for examinations;
- Fall semester would begin in late August and end mid-December;
- Spring semester would begin early to mid-January and end mid-May.
- Summer term would be between eight and twelve weeks, and would be scheduled in such a way as to maximize K-12 teachers’ opportunities to enroll in classes and pursue additional degrees.

Terms within the semesters and summer term, as well as intersessions or minimesters in January and/or between spring and summer semesters, would offer greater scheduling flexibility for students and instructors.

Undergraduates Degree Hours: Except in the College of Social Work, the minimum number of hours required for an undergraduate to graduate is 191 quarter hours. Ohio State is atypical in this regard, with most universities requiring 180 quarter hours or 120 semester hours. Much discussion has already taken place across the university with regard to reducing the number of hours required for an undergraduate degree. Throughout the report, the Committee assumes a move to a 120 semester hour baccalaureate degree would be consonant with a shift to semesters. A decision to convert to semesters is, however, entirely separable from a decision to reduce the number of credit hours required for an undergraduate degree.

Conversion Models: Estimating the financial impact of a conversion to semesters requires identification of the type of semester model that would be implemented. There are two extremes commonly discussed in the literature about semester conversion: the constant format model and the constant content model. We note that it is likely that the university would adopt a mixture of these models, much of the variation being among colleges.

The basic characteristic of the Constant Format Model (CFM) is that it is that courses retain their current (quarter system) number of credit hours after the conversion. The implication is that course content will increase because both the length of the term and the number of class meetings increases by one-half.

The basic characteristic of the Constant Content Model (CCM) is that the content of a course after conversion to semesters remains about the same as under quarters. Because the term is one-half longer, the number of credit hours awarded for classes is reduced. At converting universities, we observe reductions in credit hours per course from 5 to either 3 or 4, and sometimes from 4 to 3.
An important observation is that the typical number of credit hours per course under the quarter system is an important determinant of the expected resource outcomes after conversion. Some universities (Michigan State) began with mostly 3 and 4 credit hour quarter courses, others (Minnesota, Georgia) offered 5 credit hour courses.

At Ohio State, credit hours per course vary greatly among colleges. During WI 00, averages include Humanities (4.84), Social and Behavioral Sciences (4.49), Business (4.01), Mathematics and Physical Science (3.92), Biological Sciences (3.77), and Engineering (3.12). Most GEC courses are 3 credit hours.

**Axioms**

We believe strongly that the guidelines and standards governing a calendar conversion should be based on the understanding that such a conversion would be a structural change, which may facilitate but would not fundamentally alter the substantive nature and mission of the university. A principle of neutrality should therefore guide the treatment of academic programs through the conversion:

- The conversion of a program to semesters should preserve the intellectual mission and content of the program. This would imply that the conversion would not substantively affect the total amount of instruction offered by a program over the course of an academic year.
- In converting to semester, the relationship among programs should be preserved, whether in terms of the service of one program to another, or in terms of any other interdepartmental coordination of discrete departments.
- The impact of the change to semesters on faculty and instructional staff workload should be neutral. Consequently, the impact on university-funded research support and release time should also remain neutral.
- The impact of the change to semesters on students should be neutral. Provisions should be made to minimize the complications created for current students by the transition from quarter to semester systems. We should be liberal in our treatment of exceptions, precise hour requirements, course substitutions, and the like, to accommodate students involved in the transfer.
- The impact of the change to semesters on non-instructional staff should be neutral.
- The impact of the change to semesters on a program's budgetary needs should remain neutral.
Report of the Dissemination Subcommittee of the Ad Hoc University Calendar Committee

Subcommittee Members: Sharon West (Chair), Joe Barr, Julie Carpenter-Hubin, Grady Chism, David Lieberman, Brad Myers, Margaret Strow

Goals

• To educate the university community about a possible conversion of the university calendar from quarters to semesters
• To identify critical issues regarding a conversion
• To gauge university opinion on a conversion.

Education

The Ad Hoc University Calendar Committee established a website, www.osu.edu/calendarstudy. The site features schedules of events and reports of the experiences of other universities which converted calendars from quarters to semesters. The full committee report, with the recommendation to the University Senate, will be posted, along with a study of the pedagogical issues of calendar conversion and other research findings of the committee. The committee has asked that the site be in operation at least until the full Senate has voted on the question of the university calendar. The content of the website is also attached to this report as appendices.

The committee sponsored a one-day conference, “Semester Conversion: Exploring the Issues,” on April 3, 2001. Speakers included members of the ad hoc committee; Alan Kafish of the Center for Faculty and TA Development, discussing his literature review of the pedagogical effects of semester conversion; and faculty and staff from four universities which have converted the university calendar from quarters to semesters within the last 10 years: University of Minnesota, University of Georgia, Cleveland State University and University of Michigan. The day’s agenda featured a large panel discussion on the general issue of calendar conversion and two smaller in-depth discussion sessions on student and curricular issues and faculty teaching and research issues. To maximize access, the full program was held twice, once in the morning and again in the afternoon (see Appendix E).

Critical Issues

The committee requested that all colleges and constituent groups of faculty, staff and students organize open forums, staffed by members of the committee. Committee members made brief presentations, but the emphasis was on answering questions, where possible, and hearing issues of concern from the forum participants.

Official forums were held by 18 colleges and constituent groups; both the schedule and the issues and concerns raised at those forums were compiled as a report and posted on the website (see Appendix F). In addition committee members met informally with university committees and departments to which they belonged to further assess response.

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Opinion
The committee wrestled with how best to gauge opinion of the university faculty. Committee members did not want to engage in a faculty "vote," but did want to identify critical issues that would drive faculty preferences. Although the committee ultimately determined that the best method would be a scientific survey, conducted by the Center for Survey Research, funding was not available.

Less scientific alternatives, such as a request to members of University Senate to "poll" members through constituent lists or an email survey through the Office of the University Registrar, were rejected as being too readily subject to bias.

Report of the Resources Subcommittee

Subcommittee Members: Donald Haurin (chair), Julie Carpenter-Hobin, Beth Greene-Cosmer, James Mager, Brad Myers, David Steffen, Sharon West.

Charge
The charge to the subcommittee was to report on the expected impacts of the possible conversion to semesters on Ohio State resources. We include both fiscal outcomes and space outcomes in our analysis. The university's Academic Plan and its stated goals helped guide our analysis.

Methods
To better understand the consequences of a conversion to semesters, we reviewed the fiscal and space outcomes at other converting universities. Special attention was paid to the University of Minnesota, a comparably sized CIC university that converted in 1999. We also asked the heads of Ohio State's administrative units for their analysis of the short and long term impacts of converting to semesters on their units. We reviewed the likely impact of changes in enrollments and credit hours with the Office of Finance.

The estimates of resource impacts presented below are not definitive. Should Ohio State move forward with a conversion, more precise estimates should be developed so that the university plans wisely for this process.

Overview
Our review of the resource impacts of conversion at other universities indicated that significant changes occurred, both in the short and intermediate terms, as a result of converting to semesters. These impacts were sometimes negative and sometimes neutral; that is, fiscal resources supporting the university often declined and/or space constraints became tighter. We failed to find reports of significant short or long-term fiscal benefits in the aggregate from converting to semesters.

There are multiple facets to understanding the impact of conversion on Ohio State and on attaining the goals of the Academic Plan. Resource impacts are likely to be felt by faculty, graduate and undergraduate students, administrative units and their staff. The nature of each impact depends significantly on the type of conversion model employed, specifically, the "constant format" or "constant content" model. Both of these models are discussed below. As
it is very likely that the impact will be highly differential among Ohio State colleges both fiscally and in terms of space.

Our analysis discusses a number of factors affecting the optimal timing of converting to semesters. When we began our analysis, the fiscal outlook for the university and state were positive, but not exuberant. As our analysis progressed, the outlook for the state deteriorated and recently a hiring freeze was announced at the university. The fiscal outlook for the university is one factor affecting the timing of a conversion. We also discuss the interrelationship of the conversion with the proposed student information system (SIS). The significant cost of this system and its affordability also impact the optimal timing of converting to semesters.

Another focal point of our discussion is the likely fiscal impact of converting to semesters under the budgeting system that will begin at Ohio State in fiscal year 2003 (FY 03). Converting under an incentive-based revenue system raises questions not previously faced by Ohio State and not often faced by other universities. However, Minnesota converted to semesters under an incentive-based system generally similar to that proposed for Ohio State and we report some of their experiences and concerns.

Parameters, Constraints, and Definitions
In this section we review the range of conversion formats and the environment in which Ohio State operates. Our environmental variables include the university tuition schedule, the state subsidy model, and classroom space. We assume that semesters will be about 15 weeks of instruction and one week of final examinations. An implication is that the summer term will be shorter than 16 weeks, most semester schools selecting an eight-week term. The above schedule will permit an eight-week summer semester and a three to four week May mini-semester.

A. Conversion Formats to Semesters
Estimating the financial impact of a conversion to semesters requires identification of the type of semester model that would be implemented. There are two extremes commonly discussed in the literature about semester conversion: the constant format model and the constant content model. We note that it is likely that the university would adopt a mixture of these models, much of the variation being among colleges.

The basic characteristic of the Constant Format Model (CFM) is that all courses retain their current (quarter system) number of credit hours after the conversion. An implication of this model is that course content will increase because both the length of the term and the number of class meetings increase by one-half (e.g. 10 weeks to 15 weeks).

The basic characteristic of the Constant Content Model (CCM) is that the content of a course after conversion to semesters remains about the same as under quarters. Because the term is five weeks longer, the number of weekly meetings of a class is reduced and the credit hours awarded for a class is reduced. At converting universities, we observe reductions in credit hours per course from 3 to either 3 or 4, and sometimes from 4 to 3.

A significant observation is that the typical number of credit hours per course under the quarter system is an important determinant of the expected resource outcomes after conversion. Some
universities (Michigan State) began with mostly 3 and 4 credit hour quarter courses, others (Minnesota, Georgia) offered a mix of 3, 4, and 5 credit hour courses.

At Ohio State, credit hours per course vary greatly among colleges. During WI 00, averages include Humanities (4.84), Social and Behavioral Sciences (4.49), Business (4.01), Mathematics and Physical Science (3.92), Biological Sciences (3.77), and Engineering (3.12). GEC courses are 5 credit hours.

1. Constant Forma Model: Under this model, when quarter courses convert to semester courses they increase their content and retain the same number of credit hours per course. Implications include:
   - the total annual number of sections of courses offered declines by approximately one-third because of the reduction in total credit hours required for graduation to 120,
   - students taking only 5 credit hour courses would need only 24 courses to graduate, a significant reduction in the breadth of their university education,
   - the increase in content of courses implies greater depth in particular subjects,
   - the number of courses taken by students in a term would be about the same under semesters as under quarters,
   - generally, teaching loads defined by the number of weeks of instruction or contact hours would not change,
   - generally, teaching loads defined by the number of courses taught would fall by one-third annually,
   - the demand for classroom space will increase for selected courses and labs, but otherwise be neutral.

Example 1: a three course sequence under quarters, each course having 5 credit hours, converts to a two course sequence under semesters with each course having 5 credit hours. In both cases, students receive 30 weeks of instruction and the total the number of meetings is the same.

Example 2: three stand alone quarter courses, each course having 4 credit hours, convert to two stand alone semester courses, each 4 credit hours. Under semesters, one of the original three courses must be dropped from the curriculum or, using a multiyear rotation, these courses would be offered less often than in the quarter system. This reduction in course offerings is clearly evident in the record of other converting universities. Many courses are likely to be dropped permanently.

Example 3: an Ohio State faculty member with a six course annual assignment under quarters would have the assignment reduced to four semester courses (a one-third reduction in the number of courses). In both systems, this faculty member is teaching two courses at any point in time throughout the academic year, a neutral change. Similarly, a three course load under quarters converts to a two course load under semesters. A five course load under quarters converts to a 3.3 semester course load, this change requiring multiyear averaging of loads in the semester system (e.g. 3-4-3 over three years, or 4-4-2 with a research semester every third year). A four course load under quarters converts to a 2.7 semester load, again requiring multiyear averaging.

Example 4: an Ohio State Graduate Teaching Associate (50% FTE) with an academic year appointment and three course responsibility under quarters converts to a two course assignment under semesters. In both cases, the GTA is effectively responsible for a single course or section
at a point in time throughout the year; thus, the change is neutral in terms of the number of classes taught per year. GTA assignments also are discussed in example 6.

Example 5: students enroll in a three quarter sequence, each course requiring use of the same lab facility. Assume the lab and course capacity is 25 seats. Under the Constant Format model, the three quarter sequence converts to a two semester course sequence, again at the same 25 seat capacity. No additional lab space is required.

Example 6: all freshmen students are required to take a particular course sometime during their first year and this course's size is strictly controlled at 25 seats because of lab availability or for pedagogical reasons (e.g. English 110). Under quarters, enrollment of NFQEs is spread over the year, about 2,000 students per quarter. Under semesters, total enrollment per term would increase to 3,000 students. Lab size constraints may require changing the curriculum and number of lab experiences. One option for English 110 is to increase class size by 50%. Another is to maintain class size at 25, but increase the number of instructors by 50%. This increase in the number of instructors could be accomplished by additional hiring, increasing English 110 GTA's course loads to 2-1 or 1-2 (instead of the neutral 1-1 load), or switching GTAs from upper level English courses to English 110 (recall that one-third of classes must be eliminated).

2. Constant Content Model: Under the extreme version of this model, course content remains the same under quarters and semesters, but the credit hours assigned to a course are reduced because the weekly frequency of student contact hours declines.

Our review of other semester schools reveals that 5 credit hour courses are relatively rare. While there is no statement of the underlying reasoning behind this practice, we believe it is because 5 credit hour courses combined with a 120 total hour graduation requirement significantly decreases the breadth of the undergraduate academic experience and because meeting for five days per week for a 15 week semester likely leads to student burnout in the course.

At Ohio State, the percentage of 5 credit hour courses offered in WI 00 was 35.3, with the percentages in SP 00 and AU 00 being 35.9 and 34.5. Adopting this conversion model will have many implications for those students taking and colleges offering 5 credit hour quarter courses. Implications include:

- the total annual number of sections of courses offered will not have to decrease by one-third,
- the breadth of a student's experience will not decrease,
- the content of courses must not increase,
- the number of courses taken by students in a term would be substantially greater under semesters compared with quarters,
- teaching loads, defined by the number of weeks of instruction in classes, would increase,
- teaching loads, defined by the number of courses taught annually, may rise or fall compared with current quarter loads, but it would definitely increase compared with the Constant Format model,
- teaching loads, defined by the number of annual contact hours with students in a classroom would remain approximately the same as under quarters if the number of
annual courses taught by an instructor remains the same under semesters as under quarters,
• the demand for classroom space may increase for selected required courses and labs.

Example 7: consider a student who under the quarter system enrolls for a full-time load of 15 credit hours composed of three courses, each 5 credit hours. If these courses are reduced to 3 credit hours each, the student must take five semester courses to generate the same total credit hours in the term. Repeating this pattern throughout the year implies total quarter credit hours of 45 (3 x 15) and total semester credit hours of 30 (2 x 15). This change is consistent with the overall reduction of required credit hours to graduate from 190 to 120. (Ohio State’s graduation requirement of 191 is atypical.)

Currently, a student enrolled in a major composed of 5 credit hour courses would take about 38 courses in order to accumulate 190 total quarter hours. In the Constant Content Model, if courses are 3 credit hours, the student will take about 40 courses to accumulate 120 total semester hours. Curricular breadth is not reduced.

Example 8: An issue noted at some other universities converting using the Constant Content model is that instructors add material to a course when converting from 5 quarter credit hours (10 weeks) to 3 semester credit hours (15 weeks). This creates overload issues for students because content should be reduced as total meetings fall from 50 to 45. The implication of overloaded courses is that students are reluctant to register for five semester courses as is appropriate for a 3 credit hour per course model.

Example 9: The number of courses required to be offered by the university to a full-time student changes from 9 under the quarter system (3 terms x 3 courses per term) to 10 (2 terms x 5 courses per term) under semesters. The implication is that number of courses that must be taught will increase under the Constant Content semester model. This increase could occur through increased teaching loads of existing faculty, lecturers, and GTAs in terms of the number of annual courses or through hiring additional instructors. Alternatively, class sizes could increase. The number of faculty, lecturers, and GTA contact hours in the classroom may or may not rise depending on the relationship of credit hours to contact hours under the quarter and semester calendars. The number of weeks instructors spend in the classroom would increase dramatically if there are no additions to the instructional staff and if class sizes remain the same. This increase is a result of a 50% longer term and an 11% increase in the required number of classes.

The same general result occurs if credit hours per course are reduced from 5 to 4. In this case, the annual number of courses taught per faculty member or GTA is lower under semesters than quarters, but by less than the one third rule described in the Constant Format model. The number of weeks spent in the classroom will rise about 25% under semesters compared with quarters unless additional instructors are hired or class sizes rise.

Example 10: In example 9, the increase in the number of courses taken by students, unless offset by a proportional reduction in contact hours, will increase the demand for classrooms at a point in time. In theory, semester classes in the Constant Content model meet less frequently, freeing classroom space and permitting more courses to be offered during a term. For example, a five day a week, 5 credit hour quarter class meets only three days a week if converted to a 3 credit hour semester course. An issue that may become a concern is that five day a week quarter
classes efficiently use Fridays, while experience suggests that two or three day a week classes tend to avoid Friday meetings. However, we are not able to estimate the space impact of this possibility.

A number of universities have converted to semesters using this model. Two negative consequences have been observed.

- Some faculty and GTAs object to the increase in the teaching load, even if contact hours are about the same. This outcome probably occurs because the standard "currency" in determining teaching loads in many disciplines is the number of courses taught annually.
- Although students were repeatedly told to increase the number of courses during a term (e.g. three or four to four or five), students initially avoided doing so, resulting in a decline in total credit hours in the university.

B. Administrative and Regulatory Environment

1. Duration of Semesters: Finding a specific Regents' rule about semester length that is applicable to Ohio public universities proved difficult. Two year community colleges are subject to Board of Regents Rule 3333-04 (b), which states: "The academic semester should be of sixteen weeks duration with not less than fifteen weeks devoted to instruction." Ohio Administrative Code 3332-1-02 (B) is applicable to proprietary institutions of higher education. It indicates under its definition section that "Semester means a time span of fourteen to twenty weeks." There is no indication of whether the time span includes the exam period. We note that other Ohio public universities on semesters tend to have 14 to 15 weeks of instruction. An inquiry to the Board of Regents resulted in affirmation of the 3333-04 (b) rule.

2. Calendar of Semesters: Most semester based universities have adopted the "early semester" format consisting of a fall term beginning in mid August and ending in mid to late December and a spring term beginning in early to mid January and ending in early May. An eight week summer term is offered in June and July, which is similar to the current five week summer term offered by Ohio State (class meetings are "doubled" during a week). The above schedule allows the possibility of May mini-mesters consisting of three to four week short courses. We assume this model would be adopted at Ohio State.

3. State Funding: All public institutions of higher education receive funding for instruction from the State of Ohio through the Ohio Board of Regents. Ohio State's fiscal year 2001 funding is approximately $320 million. Through a political rather than a formula-driven process, the Governor and the Ohio Legislature determine a total amount of funding for higher education. The Board of Regents then allocates that funding to the institutions based on both their enrollments and the distribution of those enrollments through the various subsidy categories. In addition, Ohio four-year universities receive state funding through selected Challenge programs: Success Challenge, Research Challenge, and Priorities in Graduate Education. Regional campuses receive Access Challenge funds.

Ohio State's subsidy depends in a complex way on the Board of Regents' allocation formulas and on a program that guarantees a minimum funding amount for Ohio public universities and colleges. The guarantee has varied over time, generally higher during booming economic times and lower when the state economy slows. Current language (in early April 2001) states:

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"In fiscal year 2002 each campus shall have its state share of instruction adjusted to the extent necessary to provide an amount that is not less than 100 per cent of the state share of instruction received by the campus in fiscal year 2001. In fiscal year 2003, each campus shall have its state share of instruction adjusted to the extent necessary to provide an amount that is not less than 100 per cent of the state share of instruction received by the campus in fiscal year 2002."

In the recent past, four-year universities were guaranteed to receive more than 100% of the total state funding it received in the previous year for both the Challenge programs and instructional funding. For fiscal year 2000, the guarantee was 103% of the fiscal year 1999 amount, and the fiscal year 2001 guarantee was 101% of the fiscal year 2000 amount.

The Regents' guarantee program provides a partial buffer against loss of state funding should Ohio State's credit hours decline as a result of converting to semesters, assuming that the guarantees continue in the future. The buffer is partial because Ohio State would still bear the cost of foregone revenue increases that would have been earned if enrollments had remained steady. For example, if Regents' funding rose 2% in fiscal year 2002 assuming steady enrollments, but Ohio State received only the guaranteed minimum, we would forego the 2% increase in revenues. The foregone revenues assuming a 2% increase and $120 million in state subsidy would be about $6.4 million annually. However, projected scenarios are more complicated than this simple example and are discussed below. We note that some Ohio public universities' funding is now dictated by the guarantee; for example, Youngstown State has been on the guarantee for six consecutive years.

Another aspect of the subsidy distribution process that is relevant is that a university has a choice of multiyear averaging methods when computing its enrollment. Currently, the Regents allow a choice of the most recent five or two year period. It is possible to switch among options from year to year, depending on which is most beneficial to the institution.

An important consideration is that universities in other states are subject to different systems of state support; thus, their fiscal experiences when converting to semesters depend on the specific environment under which they operated. Their fiscal experiences are not perfect predictors of Ohio State's likely fiscal experience under semesters.

4. Tuition Revenues: Another important source of revenues for Ohio State is tuition and fees, currently about $300 million annually for the Columbus campus. Ohio State's method of charging for tuition is to levy a per credit hour charge up to 12 credit hours, then cap tuition at that amount. For example, the in-state undergraduate 2000-2001 tuition and fee schedule for a quarter is:
<table>
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<th>Credit Hours</th>
<th>Tuition: Columbus campus</th>
<th>Tuition: Regional campuses</th>
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<tr>
<td>0</td>
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<td>99</td>
</tr>
<tr>
<td>1</td>
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<tr>
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</tr>
<tr>
<td>12+</td>
<td>1,461</td>
<td>1,176</td>
</tr>
</tbody>
</table>

This tuition cap at 12 credit hours was established in autumn quarter 1980. The structure is atypical; some universities charge per credit hour throughout the range of credit hours, others charge per hour up to 15 hours, and some have a surcharge for “excess” credit hours, e.g., above 18 or 20 hours. Implications of the Ohio State tuition schedule include:

- Tuition is relatively insensitive to small declines in per term credit hours of students enrolled 15 or more credit hours
- Tuition is sensitive to decreased credit hour enrollment by part-time students.

At the Columbus campus of Ohio State, over 90% of annual credit hours are attributable to full-time students. Part-time enrollment is greatest during the summer quarter, but, even so, about 75% of credit hours are attributable to full-time students.

5. **Space**: During AU 2000, the Columbus campus registered 11,082 contact hours requiring classroom pool space. The distribution across days of the week was: 21.8%, 22.2%, 22.5%, 21.6%, and 11.6%. An implication is that classroom pool space is available on Fridays. The distribution across times of the day is:

- 7:30 a.m. 2.3%
- 8:30 8.9%
- 9:30 11.7%
- 10:30 11.8%
- 11:30 11.4%
- 12:30 9.6%
- 1:30 10.9%
- 2:30 9.4%
- 3:30 7.9%
- 4:30 5.9%
- 5:30 3.4%
- 6:30 3.1%

An implication is that there is some classroom pool space available early in the morning and late in the afternoon. To the extent that the conversion model requires additional classroom space, it is likely that the additional demands will require more efficient use of Friday, early mornings, late afternoons, and nighttime availability.

**Post Conversion Experiences at Other Universities**

The subcommittee reviewed the resource outcomes at other converting universities as described in publicly available data, university committee reports, and interviews. We comment on the impacts on enrollments, credit hours, financial resources, space, and administrative costs.
A. Administrative Costs

1. Continuing administrative costs: There appears to be an informal consensus among converting universities that changes in continuing administrative costs are marginal in size relative to the size of the university’s administrative budget. Below, we report estimates for Ohio State, and we conclude that our administrative unit’s predictions are consistent with the observations from other universities.

2. One-time conversion costs for administrative units: There is consensus that the cost of converting to semesters is large in size, especially in terms of time devoted to the conversion task. Peter Zetterberg, the person in charge of Minnesota’s conversion, estimated the one-time conversion cost, excluding faculty time and their SIS, was about $4 million. Additional advising costs at Minnesota were reported to be about $600,000.

3. A timing issue: Although a new SIS (estimated at $50 million) will be needed regardless of conversion, this expense will need to be incurred before conversion to semesters.

B. Enrollments and Credit Hours

An important determinant of the financial impact of the conversion is the impact on enrollments and credit hours. At converting universities, we note that the typical pattern of enrollment change is:

1. Announce a conversion will occur at a set date in the future. As the conversion date nears, enrollments and credit hours spike as students attempt to complete their degrees under the quarter system and avoid being subject to the conversion.

2. Just after the conversion occurs, credit hours fall to levels significantly lower than the steady state (even after adjusting for the change in the “value” of credit hours). While some of this change is likely explained by a post conversion reaction to the pre-conversion spike, there is consensus that the change is primarily explained by students failing to enroll in a sufficient number of classes. Other reasons for the reduction include fewer part-time student enrollments and the loss of summer enrollments. This reduction occurs for at least two years, perhaps longer.

3. The long-term enrollment responses to a conversion are difficult to separate from other long-term influences on enrollments.

A short-term reduction in credit hours resulting from a conversion to semesters is well established. At research universities that recently converted and for which data is available, this reduction was as follows:

- Credit hours at Georgia Tech fell by 0.6% in FTE students following conversion (“Transition to Semesters: Effects on Enrollment and FTE Students,” Rosenthal, 2000, Auburn University).
- The University of Georgia experienced a 4.4% decrease in credit hours in the fall of 1998, the first year of the conversion. The following year credit hours were 1.8% lower than the pre-conversion level (Office of Institutional Research & Planning, University of Georgia).
- Fall term credit hours at the University of Minnesota declined by 0.6% following conversion in Fall 1999, and recent data suggests they increased by 1.4% in autumn 2000 as compared with Fall 1998 (Office of Institutional Research & Reporting, University of
Minnesota. At Minnesota, the average number of credit hours taken by Liberal Arts college students dropped by 0.76 per term in the year following the conversion (Appendix 0).

Rosenthal further notes the following declines in credit hours, which aggregate the experiences of two- and four-year colleges and universities:

- Alabama: 30 colleges converting in 1998 had a decline of 6.8% in enrollments and 18.5% in student FTEs. Thirteen nonconverting colleges in the same state had a slight increase in enrollments and stable student FTEs. This effect persisted into the second year.
- Georgia: 33 colleges converting in 1998 had a decline of 3.3% in enrollments and 13.2% in student FTEs. The single nonconverting college in Georgia had an increase in enrollment of 7.6% and of 8.1% in student FTEs. There was some attenuation of these outcomes in the second year, but the levels remained lower than before the conversion.
- Utah: 8 colleges converting in 1998 had a decline of 9.1% in enrollments and 11.6% in student FTEs. The single nonconverting college in Utah experienced increases of 13.6% in enrollments and 11.3% in student FTEs. There was significant attenuation of these outcomes in the second year.

The fall in enrollments and credit hours occurred even though they were predicted and the universities took countermeasures. For example, the converting universities invested in advising and educating their students about appropriate course loads under semesters. This problem is most likely when the typical course load under quarters consists of three 5 credit hour quarter classes and changes to five 3 credit hour semester classes. The strong tendency is for students to enroll in fewer than five classes, perhaps because of habit, or because of the difficulty in scheduling five classes, or because of concerns about grades with a five class load. The widespread observation of this behavior at other universities suggests that it should be expected at Ohio State if the Constant Content model is adopted, especially in those colleges relying on 5 credit hour quarter courses.

C. State Subsidy

The impact of the conversion on state subsidy depends heavily on the nature of the state subsidy system. If the university receives a line-item subsidy independent of enrollments, then the conversion is not likely to have an impact on state subsidy. If the subsidy is enrollment linked, then careful attention must be paid to projected changes in enrollments due to the conversion. Because Ohio’s subsidy model differs from that of other states, our predictions must be developed based on factors particular to Ohio and Ohio State.

D. Tuition and Fees

The impact on tuition and fees depends on the impact of the conversion on enrollments, credit hours, and on the university’s tuition schedule. Minnesota’s tuition is on a per credit hour basis with no capped “full-time” fee. When Minnesota lost enrollments after conversion, the result was a significant negative impact on tuition revenues. Most Ohio public universities have a full-time fee, but charge additional tuition for overloads; that is, if total credit hours in a term exceed some maximum amount. Examples include Akron and Toledo (above 16), Bowling Green (above 18), Cincinnati (above 19), and Ohio University (above 20). Miami’s schedule is the same as Ohio State’s defining full-time as 12 credit hours in a term. We conclude that the reductions in tuition observed in other converting universities will not necessarily occur at Ohio State due to our atypical tuition schedule.
E. Space

Observation of the quarter to semester conversion outcomes at other universities suggests that two space related issues are of particular interest: the demand for relatively large classrooms and the demand for labs.

1. After conversion, some other universities noted that the percentage of classes greater than size 50 tends to rise. Recent examples of the pre and post conversion percentage of classes over size 50 include: Minnesota (13% to 17%), Georgia Tech (11% to 16%), Utah (14% to 16%), and Utah State (11% to 15%). The increase was not observed at Toledo or Georgia. It is not clear why these changes occurred.

2. Data on lab usage are sparse. It is likely that course requirements in majors and General Education categories simply adapt to the existing amount of lab space, offsetting any increase in student demand with reductions in per student usage of labs. Michigan State reported installing additional lockers for chemistry classes.

The Heterogeneity of Ohio State

Our review of Ohio State data indicates that colleges have adopted different instructional strategies. We are not able to state why these differences are observed; however, they likely reflect differences in resources, educational philosophy, disciplinary norms, and accreditation standards. Specifically, some colleges have adopted 5 credit hour classes as the norm, others use 4, and some use 3 as the norm.

The implication of this variation is that some colleges are likely to convert following the Constant Format model while others are likely to follow the Constant Content model. At Ohio State, the colleges with the greatest percentages of 5 credit hour courses in WI 2000 are: Humanities (94%), Social and Behavioral Sciences (73%), Biological Sciences (45%), and Mathematics and Physical Sciences (44%). A much smaller percentage of 5 credit hour courses is observed in Business (16%) and Engineering (5%). It is likely that there will be a greater impact of converting to semesters on those colleges with a greater percentage of 5 credit hour courses. Specifically, these will be a greater incentive for these colleges to adopt a teaching load model that results in more courses taught per faculty member and per GTA than the standard two-thirds conversion described above.

We also have observed that teaching loads also vary widely among colleges. There is no Ohio State standard for the number of courses taught while on quarters, and we predict there will be none on semesters. We expect conversion of teaching loads to differ among Ohio State’s colleges.

Lab use and offerings of courses with constrained sizes also varies widely across Ohio State colleges. In some colleges, science labs dominate, in others, computer labs dominate. Honors courses are limited in size (25 maximum) as are other courses that have significant writing components (English 110, GEC Second Writing, GEC Contemporary World Capstone). It is reasonable to assume that classroom size issues resulting from conversion will be felt throughout Ohio State.
The implication of the above observations is that the impact of conversion to semesters will have highly differential impacts on colleges at Ohio State. This observation complicates attaining the ideal of a neutral conversion.

**Conversion to Semesters and Incentive Based Budgeting**

The Resources Subcommittee is concerned about conversion to semesters under a fiscal system guided by Ohio State’s Budget Restructuring plan. The incentive part of budget restructuring is planned to begin July 1, 2002 (FY 03). Under this plan, changes in tuition and subsidy generated by changes in a college’s enrollment are shared with the college. A benefit of this program is the creation of an incentive to solve serious questions such as closed courses and the lack of resources to begin new curricular programs. It is recognized that a potential cost of this budgeting system is that it will create an incentive for course “poaching” and unwarranted expansion of majors, and for crowding out honors and interdisciplinary courses. Among the proposed solutions to course poaching is expansion of the oversight role of the CAA, enabling increased scrutiny of course changes.

Converting to semesters requires that all university courses and curricula be reviewed and revised. Some course revisions may be minimal; however, some curricular majors may use this process as a time to completely revise their curricula. It is also expected that the GEC will undergo significant review and revision, which is typical at converting universities. Because college curricular review committees cannot be expected to review thousands of courses and CAA cannot be expected to review all university courses, majors, and minors, converting universities typically employ an expedited course review process to permit semester conversion in a reasonable time frame.

The conflict between these two significant Ohio State initiatives is apparent; one argues for increased scrutiny of courses, the other argues for an expedited review process. Minnesota implemented its Resource Centered Management (RCM) system and converted to semesters, selecting the expedited course review model. Their dean of Liberal Arts reports significant post conversion changes in the distribution of credit hour production among colleges (Appendix O). Some majors significantly expanded their share of in-house production of credit hours when converting to semesters, yielding a substantial monetary return. When Minnesota converted to semesters, it created the opportunity to act on the incentives inherent in the budgeting system, and course poaching and unwarranted expansion of majors was difficult to detect. Prevention of course poaching at Ohio State would require CAA to establish procedures for careful review of all converting university courses and major programs. College and their curricular review committees are not disinterested parties; thus, they cannot be the sole reviewers of course and curricular conversions when implementing semesters.

Even if the impact on the university of converting to semesters was revenue neutral overall, the fiscal consequences for some colleges and departments could be highly negative. The particular outcome likely depends upon the nature of colleges’ curricula under quarters, the nature of the change in the GEC, and strategic behaviors by colleges. At Minnesota, the College of Liberal Arts attributes a $3.76 million loss in revenues from FY 99 to FY 00 to the conversion to semesters at the beginning of FY 00 under the university’s RCM budgeting plan (Appendix O). We see no way to convert to semesters under Ohio State’s Budget Restructuring plan and avoid the fiscal incentives inherent in this program. The conversion will permit many forms of course poaching. Detection is likely impossible because the conversion requires serious reconsideration.
of GEC requirements, major programs, and the form of electives. Minnesota’s example suggests that departments and colleges will recognize the fiscal advantages of moving credit hours “in-house” and will act on these incentives when converting courses and major programs to semesters.

**Expected Resource Implications if Ohio State Converts to Semesters**

**A. Administrative Units**

The subcommittee asked Ohio State’s administrative heads to estimate the short term and long term financial impacts, both positive and negative, of the conversion to semesters. We also requested that they separate short-term conversion costs (if any) from the long term annual benefits or costs of the conversion. It is important to note that we limit our discussion to the expected financial impacts reported by the units.

Because many Ohio State units operations are not related to the type of academic calendar, we expected that many units would anticipate little or no fiscal impact of the conversion to semesters. This result occurred in the following cases (with the person submitting the report noted in parentheses).

- Development (Jectomy May)
- Libraries (Sally Rogers)
- Office of International Education (John Greisberger)
- Business and Administration (Janet Ashe): little or no fiscal impact is expected for: Addressing Services, Buck-I Mart, Coin-Op Machines, Cost-per-Copy, Document Management Services, Printing Services, Public Safety, Purchasing, Receiving, Stores, Surplus, Trademark & Licensing, Travel, Unicomp, and University Mail Services.
- Honors and Scholars (Dan Farrell): no fiscal impact on the Honors side and perhaps some modest gains on the Scholars side resulting from less time spent advising in a system that registers students twice a year rather than three times.
- Office of Admissions (Jim Mager) including the Undergraduate and Graduate/International/Professional Admissions, Office of First Year Experience (including Orientation). The exception is conversion of the legacy information systems, which is discussed below.

Some fiscal impacts are expected by:

- Commencement and Special Events (Carol Ries): no conversion cost, some savings potential but it depends on the size of the commencement and the resulting location (e.g. St. John’s or Schottenstein Center). The primary cost is printing diplomas and this is not expected to change.
- Continuing Education (Tony Basil): no impact for Conferencing activities or Professional Development. Minimal cost savings from one fewer registration period. Some loss of enrollment of non-traditional students in their Credit Programs due to the longer time obligation of semesters.
- Student Affairs (Eric Busch): neutral or positive operating effects from one fewer setting of student work schedules. Student affairs units include: Counseling and Consultation Services, Student Affairs Assessment, Recreational Sports, Student Health Services, Schottenstein Center, Disability Services, Parent Association, Student Advocacy Center, Student Judicial Affairs, Off-Campus Student Services, Residence and Dining Halls,
Ohio Unions, Ethnic Student Services, Gender and Sexuality Services, Student Activities and Campus Programs.

- Office of Research (Brad Moore): some one-time costs for programming semesters related to the OSURF Project Payroll and one-time costs by the Office of Research Risks Protection related to converting protocols for instructional use of animals. Minor effects are expected for the Byrd Polar Research Center, but the Center for Lake Erie Area Research may have more significant impacts on their Stone Laboratory summer programs depending on the nature of the summer calendar under semesters.

- Graduate School (Susan Huntington): no significant long-term benefits or costs were identified in the preliminary analysis. Conversion costs are likely for Graduate School publications and Data Services. A significant time cost of conversion could be borne by the Graduate School's Curriculum Committee and the Research and Graduate Council due to review of changes in degree requirements if semesters are adopted.

- Business and Administration (Janet Ashe): possibly an increase in workload of Facilities Planning and Development to address changes in space needs related to classrooms and labs. Offsetting impacts are foreseen by Cop-ez and the Bookstores. Review of other universities suggests at least a short-term decline in bookstore sales and thus revenues, offset by savings in advertising and staffing expenses. Cop-ez expects a 20% decrease in sales ($250,000 annually), offset to an extent by savings in advertising and student staffing. Transportation and Parking expects an annual savings of $40,000 due to changes in bus schedules.

- Office of the Treasurer (Alvin Rodack): minimal fiscal impact is expected for Fees and Deposits, Student Loan Services and Accounts Receivable, and Bank Reconciliation. A continuing benefit in the low six figures is expected for Endowment and Treasury Management due to larger early tuition and fee collections under semesters. A possible offset is increased use of the Tuition Option Payment Plan (TOPP) program, creating more transactions and delaying the receipt of student fees.

- Office of the Registrar (Brad Myers): a continuing benefit of $320,000 consisting of savings of $130,000 in Scheduling, $120,000 in Student Registration and Records, and $20,000 in Advising Reports.

- Office of Financial aid (Jim Mager): a continuing benefit of $80,000 of staff time is estimated from the elimination of one financial aid cycle. These benefits could be offset if the semester system incorporates short-term courses.

- The Office of Human Resources (Larry Llewellyn): a one-time cost of about $80,000 to reprogram HR systems.

If we do not implement the new SIS, significant fiscal impacts are expected by:

- Office of Information Technology in the Office of the Chief Information Officer (Ilse Rhimes): the conversion would have minimal impacts except on reprogramming the legacy systems supporting enrollment services. The Registrar reports an estimate of $2.9 million. If done as part of implementing SIS, there would be no additional cost. The Office of Admissions notes that the one-time cost of converting its Prospects, Admissions, and LetterWriter systems is estimated to be $381,000; these are part of the legacy systems.

- Office of Student Financial Aid (Jim Mager): the cost of converting the financial aid system, if not done in conjunction with implementing the SIS, is estimated to be as high as $1 million.
• There is a significant risk that the current legacy system will not survive a transition to semesters even with the funding listed above.

Associated fiscal impacts are expected by:

• Housing, Food Services, and Event Centers in Student Affairs (Eric Busch): the change in calendar to a mid-August start creates a greater need for air conditioning the South Campus residence halls (3,850 students). The cost is likely to exceed $16 million. Currently, there is a plan to air condition the South Campus buildings, this plan independent of the move to semesters. Increased student room fees and summer conference housing charges will cover the additional costs.

B. Tuition and State Subsidy

Estimating the fiscal impact of converting to semesters is a difficult task. Our review of the outcomes at other converting universities reveals a consistent pattern of negative fiscal impacts, sometimes severe. The choice of conversion model significantly influences the fiscal and space impacts. The following discussion focuses on expected outcomes at the Columbus campus.

Based on the reports of other institutions, we expect credit hours to spike just before the conversion, then fall following the conversion, and then slowly recover over a multiyear period. The following chart summarizes the general form of financial implications if this enrollment scenario is realized.

<table>
<thead>
<tr>
<th>Year</th>
<th>Credit hours</th>
<th>Tuition revenues</th>
<th>Subsidy revenues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Just before converting:</td>
<td>higher</td>
<td>slightly higher</td>
<td>(determined by the prior years' changes)</td>
</tr>
<tr>
<td>Conversion year</td>
<td>much lower</td>
<td>lower</td>
<td>higher</td>
</tr>
<tr>
<td>Conversion +1 &amp; +2</td>
<td>lower</td>
<td>slightly lower</td>
<td>slightly lower</td>
</tr>
<tr>
<td>Conversion +3 &amp; +4</td>
<td>slightly lower</td>
<td>little change</td>
<td>lower</td>
</tr>
<tr>
<td>Conversion +5</td>
<td>no impact</td>
<td>no impact</td>
<td>slightly lower</td>
</tr>
<tr>
<td>Conversion &gt; 5</td>
<td>no impact</td>
<td>no impact</td>
<td>no impact</td>
</tr>
</tbody>
</table>

The reasoning underlying these predictions is as follows.

• In the year prior to conversion, credit hours rise as students attempt to graduate and avoid conversion issues. Tuition rises modestly as some part-time students become full-time and perhaps some “stopped-out” students return. Students increasing their credit hour load do not generate additional tuition. The change in state subsidy reflects changes in prior years’ enrollments.

• In the conversion year, we predict credit hours will fall, perhaps substantially as occurred at other converting universities. Tuition revenues will fall, but the impact is mitigated by our tuition structure. State subsidy will rise as the university will select to use a two year average of the prior years’ enrollments; that is, the enrollment spike has a delayed beneficial effect.

• In years just following the conversion, enrollments remain slightly lower than desired. Tuition revenues will be lower, but not by significant amounts. State subsidy will fall even though the university optimally selects among the two and five year averages. We may be subject to the guaranteed state minimum subsidy.
In the out years, we expect enrollments to recover as the student population will have been subjected to semesters throughout their careers. The negative impact on state subsidy will take somewhat longer to disappear than the impact on tuition.

Below, we quantify our estimates using information provided by the Office of Finance.

Separating the Total Credit Hour Issue from the Conversion Issue. If we assume that the undergraduate degree requirement will change to 120 credits, the following reduction in enrollment-driven revenue will occur. The revenue reduction, however, is due to the decision to reduce the number of credit hours for an undergraduate degree, which may occur under either calendar model; it is entirely separable from a decision to convert to semesters. Currently, 191 or more quarter hours is the standard for most Ohio State undergraduates, the primary exception being Social Work (180 hours). All of the semester schools we reviewed require 120 semester hours for graduation. It is likely that a conversion to semesters will involve changing to 120 total hours, this change is equivalent to reducing the current Ohio State graduation requirement from 191 to 180 hours. While we could convert to an atypical 127 total credit hour semester model and increase the likelihood of retaining fiscal neutrality, our sense is that we would be viewed as an outlier among semester universities.

We requested that William Shkurti’s office perform an analysis of the impact of this change. The logic of the fiscal outcome for this example is based on students taking fewer courses, generating less tuition and subsidy, and graduating sooner. Faster graduation results in more Success Challenge funds, but the amount is estimated to be modest ($85,000). We recognize that the estimate of the financial loss is based on particular assumptions about how the reduction in credit hours is distributed among students. The analyst (Henry Zheng) projected an annual loss of tuition and subsidy of $12.7 to $15.2 million, not accounting for the impact of the Regents’ guarantee program or multiyear averaging. This loss would be permanent, not attenuating over time, because the change in credit hours needed to graduate is permanent.

2. An Estimate of the Intermediate Term Impact of Conversion on Tuition and Subsidy: We requested that William Shkurti’s office estimate the potential impact of declining credit hours. Roseenthal’s analysis described above suggests that a one-year decrease of 10% in credit hours is possible, with the range of experiences being relatively wide. The estimated is that for every 1% decline in credit hours, Ohio State will lose $3.6 million in tuition and subsidy, not accounting for the Regents’ guarantee program or multiyear averaging.

The above estimate must be modified to account for multiyear averaging and the Regents’ guaranteed minimum. Using various simulations of enrollment patterns as described in the table above, we find a significant reduction in the estimated negative fiscal impact of conversion. We make the following assumptions: there is a 5% positive spike in credit hours the year before the conversion, credit hours decline 10% post conversion but the reduction attenuates over five years, state subsidy rises 2% annually, and the current guarantee program remains in place. For this case we estimate that the total loss of subsidy over the period of credit hour changes is reduced by 55% compared to the above estimate, the amount equaling about $8 million in the first year. If the spike is greater or the period of declining credit hours shorter, the loss of subsidy is even lower. If the guarantee falls to less than 100% of the prior year’s revenues, the loss is marginally greater. The loss declines over the five year transition period.
in contrast, there is so state buffering of lost tuition. However, we previously observed that
there is a buffer built into Ohio State’s tuition schedule due to the cap on tuition at 12 credit
hours. There is insufficient information to know how any reduction in credit hours would be
distributed between existing full and part-time students and we provide no estimates. We expect
that the loss will be much less than is predicted using a model that does not include the tuition
cap.

Combining the lost revenue from changing to 120 semester hours with the expected pattern of
enrollment changes and accounting for the buffering of state subsidy and Ohio State’s tuition
structure results in the following rough predictions.

- We expect the impact on tuition to be relatively modest from the combined period from
  just prior to conversion to five years after the conversion.
- Even with multiyear averaging and the state guarantee, we expect there to be a significant loss of
  state subsidy compared with the no conversion case.

Over the six year period from just before the conversion to the fifth year after, combining our
simulation results with the predictions of the Office of Finance yields a total loss in state subsidy
of about $40 million. The annual loss would vary over time as noted in the above table. This
impact includes the effect of changing to 120, not 127, semester hours.

Our intent is to neither over or understate the impact of the conversion on Ohio State’s largest
revenue sources for general funds. We view the above estimate as reasonable given the variety
of experiences of other converting universities and accounting for the fiscal environment in
which Ohio State operates. In contrast, a worst case scenario would be very damaging and
would significantly impede Ohio State from achieving the goals described in the Academic Plan.
On the other hand, a well planned conversion, saving funds earned during the “spike” year
before the conversion, and temporarily admitting additional NFQFs and transfer students in
the year of conversion and for a short term thereafter could yield a revenue neutral outcome in terms
of tuition and subsidy.

C. Special Long Term Concerns about the Summer Semester

The impact of a conversion to semesters on summer quarter enrollments is important, but
difficult to predict. If the summer semester is eight weeks in length, from mid June through
early August, we believe that the enrollment of K-12 teachers will be greater than now.
Currently, 28% of summer quarter graduate level credit hours are generated by the College of
Education. Also, creating a May mini-semester would increase revenues, depending on
enrollments.

However, an eight week summer term implies that courses will meet twice as frequently as in a
regular semester, similar to Ohio State’s current practice of offering five week terms in the
summer quarter. An implication is that without a full length summer semester it will be very
difficult for students to enroll full-time. The decline in student summer term FTIs would be
permanent. Currently, 66% of summer undergraduate level credit hours are due to full-time
students. This change in the summer term would reduce nearly all full-time students to part-time
status, implying a reduction in tuition revenues as well as state subsidy. For example, if
undergraduate full-time summer quarter students cut their credit hours in half, Ohio State would
lose about 48,000 credit hours annually.

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We conclude that there is a significant risk of enrollment declines during the summer quarter. There are potentially serious fiscal consequences. Offsetting effects could come from additional enrollments of K-12 teachers, from the May mini-mester, or from students from other semester-based schools. If these offsetting changes do not occur, the loss in tuition and state subsidy listed above could be an underestimate. Further, the fiscal loss due to the change in the summer program would be permanent, not transitory.

A partial solution to this concern is allowing for creative scheduling of courses in the mid-May to mid-August period. Combining intensive mini-mester courses with regular summer term courses could help increase full-time enrollment between May and August.

D. The Value of Faculty Time Spent on Converting Courses

It is anticipated that a significant amount of unreimbursed faculty time will go into a conversion to semesters, but estimates of the value of this time have varied considerably. Peter Zetterberg, the head of Minnesota's conversion to semesters, estimated that the value of Minnesota's faculty time spent on converting was about $50 million over their four year conversion period. He noted that this is a rough estimate and the actual value of time spent on the conversion could be lower or greater.

Richard Gunther used a different methodology in 1991 to estimate the value of faculty time that would be spent converting Ohio State courses to semesters. He assumed 40 hours are needed to convert a course from quarters to semesters. Course loads and preparations vary widely by college, but we assume that the average is four, yielding 160 hours spent on conversion per faculty member. Further, we assume a 2,340 hour work year for Ohio State's 3,029 faculty. The average faculty compensation in FY 00 was $69,519 according to Ohio State Profiles data. The total conversion cost according to Gunther's method is therefore $40/2,340 x 3,029 x $69,519 = $14.4 million. We note that additional time is likely to be spent on revising the GEC, majors, and minors for the semester system.

Using either method, the cost to faculty in terms of foregone time is very significant. Some of this time would have been spent on normal course revision and some would be spent on revising Ohio State's GEC, but there is a consensus among faculty at converting universities that the conversion process is disruptive. Whether the administration compensate faculty for this cost varies among converting universities, but the cost is real nonetheless.

E. Possible Increases in Instructional Costs under the Constant Content and Constant Format Conversion Models

In the Constant Format conversion model, courses convert to semesters carrying the same credit hour value as the courses had under quarters. An implication is that the teaching loads can convert using the "one-third rule". At Michigan State, total credit hours required for graduation fell from 180 to 120; that is, by one-third. The total number of sections offered during an academic year fell by one-third. Correspondingly, the total number of faculty taught sections fell by one-third implying that a six course quarter load would be reduced to four semester courses. Thus, Michigan State foresaw no additional instructional costs using the Constant Format conversion model.

The key difference between Michigan State's quarter system and Ohio State's is that Michigan State offered only 3 and 4 credit hour courses under quarters, while Ohio State offers many 5
credit hour courses. We foresee no additional instructional cost if the Constant Format model is adopted; however, adopting 5 credit hour semester courses would be highly atypical. Those Ohio State colleges that offer mostly 3 and 4 credit hour quarter courses (Engineering, Business) could adopt the Constant Format conversion model.

Other colleges at Ohio State offer some or many 5 credit hour courses. If these colleges adopt the Constant Content model and reduce their credit hours per course to 3 and 4, then one or more of the following will result.

- The teaching load in terms of number of courses will rise for faculty, GTAs, and lecturers. This is costly in terms of instructor time, not out-of-pocket expenses for the university.
- More instructors are hired, allowing the teaching loads of faculty and GTAs to be reduced following the one-third rule as dictated by the Constant Format model.
- Class sizes increase, allowing the number of instructors to remain the same and teaching loads to be reduced by the neutral one-third rule.
- Wait-lists for students increase, allowing the number of instructors to remain the same, teaching loads to be reduced by the one-third rule, and class sizes to remain constant.

The Academic Plan promotes increased quality of instruction; thus, neither class sizes nor waitlists should increase as a result of conversion to semesters. If the conversion is to be neutral to faculty and GTAs, teaching loads should not increase.

To derive estimates of the potential cost of additional instructors needed in the Constant Content model, we first note the standard annual credit hour load under quarters: (19ż4 = 47.75) and under semesters (1204ż3=30). We consider an example where the average course load for a student changer from 9.55 courses, each 5 credit hours (47.75 total quarter hours) to 3 credit hour semester courses (30 total semester hours). The total number of courses needed by the university rises from 9.55 to 10 (a 4.7% increase). The Ohio State Registrar reports that in WI 00, SP 00, and AU 01, the university offered 3,439 courses that were 5 credit hours. If all 5 hours courses converted to 3 credit hours, the university would need to offer an additional 162 courses (an 4.7% increase) to meet student demand. If faculty and GTA annual teaching loads were reduced upon conversion to semesters following the one-third rule, only two-thirds of 3,439 courses would be offered, (2,292) leaving the university far short of the 3,601 needed courses (3,439+162=3,601). This shortfall of 1,309 semester courses (3 credit hours each) must be covered by either a significant increase in the number of faculty and GTA courses taught per instructor (compared to the neutral one-third rule change), or by hiring additional instructors. If the average semester course load for faculty members is four, the shortfall of 1,309 courses requires hiring 327 faculty at an annual cost of salary and benefits of over $27 million. If only instructors or GTAs are hired to teach the additional courses at a cost of $4,006 per course, the annual cost would be over $5 million (not accounting for fee waivers).

If we modify the above example to convert all Ohio State 5 credit hour quarter courses to 4 credit hour semester courses, then the costs are lower. The typical annual student load would change from 9.55 quarter courses to 7.5 semester courses, a 21.5% reduction. The university would need to offer only 2,701 sections to meet student demand for those courses that were previously 5 credit hour quarter courses. However, the one-third rule applied to teaching assignments implies that only 2,292 are offered leaving an instructional shortage of 409 courses. The
estimated cost of hiring faculty to cover these additional courses is $8.5 million annually, or about $1.6 million annually if only additional GTAs and lecturers are employed.

Additional points include:
- These additional instructional costs would be distributed unequally across Ohio State, concentrated in colleges and campuses where 5 credit hour courses are the norm.
- These additional instructional costs are not realized if faculty and GTA teaching loads increase, a model adopted by some other converting universities.
- The teaching load, if defined in terms of contact hours with students, may be no greater with five 3 credit hour semester courses than three 5 credit hour quarter courses.

However, we believe that most faculty members define teaching loads in terms of number of courses assigned, not contact hours. This is certainly the practice at a majority of Columbus campus departments and the regional campuses.

F. Costs Associated with the Transition Summer

Our expectation is that the transition summer will be "short", ending in early June (the final spring quarter) and beginning in mid-August (the first fall semester). Staff should not be affected fiscally because they are paid for work performed in the past month or bi-weekly period. Faculty members are affected because of the practice of Ohio State paying over 12 months for nine months of work. We address this case in one of our recommendations, the conclusion being that the university must issue faculty "double pay" for either one or 1.5 months.

Many undergraduates will lose over one month of full-time work during the transition summer, possibly affecting their ability to afford college. This loss of income is serious for students who may compensate by "stopping-out". Implications include delayed graduation and reduced university tuition and subsidy revenues.

Creative solutions to this problem include the possibility of a one-time shortened fall semester or a conversion to semesters following a fall quarter term. The latter option is feasible because both winter quarters and spring semesters start in early January; however, all of the consequences would have to be studied. An obvious downside is that New First Quarter Freshmen (NFQFs) would be exposed to a single term of quarter courses.

G. Issues Related to the Flexibility of Faculty Research Time

We are not able to quantify or monetize the impact of converting to semesters on faculty research time. We note that faculty at other universities report that the flexibility of research time is lower under semesters. Specifically, it is more difficult to rearrange courses to get a research-only term under semesters. Examples of flexibility in scheduling under quarters and semesters are provided in the subcommittee report on faculty issues. Based on the principle that the conversion should be neutral, one of our recommendations proposes a new program of research seminars, similar to that implemented by Minnesota when they converted.

H. Concerns About Tuition Payments under Semesters

A concern sometimes expressed about converting to semesters is that the tuition and fees for a semester are greater than those for a quarter and this larger payment at the start of a term could dissuade some financially constrained students from enrolling or result in some students dropping below full-time status. The result would be a decline in enrollments and student FTEs. We do not expect this outcome to occur at Ohio State because of the Tuition Opt out Payment
Plan (TOPP) program. It allows students to pay tuition and other University expenses in monthly installments without interest charges, but requires an enrollment fee of $35 for an academic year.

1. Regional Campus Budgets
Regional campuses at Ohio State are, to a substantial extent, fiscally independent of the Columbus campus. We do not have sufficient information to be able to predict the impact of the conversion on their tuition and state subsidy. The critical element is predicting the change in total credit hours. We expect that the conversion of 5 credit hour GEC courses to 3 or 4 credit hours will have an impact because regional campus students are unlikely to enroll for the number of courses needed increase to offset the reduction in credit hours per course. We suggest that the regional campuses develop predictions of the fiscal consequences of the conversion to better plan for the proposed change.

Conclusions
Evidence gathered from converting universities and the expectations of Ohio State administrative units paints a reasonably convincing picture of the resource outcomes of conversion to semesters. Important points include:

- Long term administrative savings from conversion are relatively modest, likely less than $500,000 annually.
- Short term administrative conversion costs are relatively modest
- The Student Information System, costing an estimated $50 million, must be implemented before or with the conversion to semesters.
- The cost to faculty of converting to semesters in terms of diverted time is very large.
- There are significant financial risks of converting to semesters in terms of lost tuition and state subsidy for the five year period following conversion. The university must be prepared for this loss by developing a substantial conversion fund that would ensure Ohio State does not suffer the negative outcomes of conversion observed at other recently converting universities.
- Long term negative consequences for tuition and state subsidy are possible, especially because of the 8 week summer semester. Creative curricular and scheduling actions could help to stabilize enrollments.
- Regional campuses may bear significant fiscal effects (positive or negative) from the conversion, but we have insufficient information to make an estimate. Regional deans should thoroughly study likely enrollment levels should Ohio State convert.
- The impact of conversion to semesters will be highly differential among Columbus campus colleges because of differences in the typical number of credit hours per course in the quarter system.

Recommendations
1. We strongly recommend that a conversion to semesters NOT occur prior to development of the planned $50 million Student Information System. If conversion occurs prior to SIS, we will pay twice for the same reprogramming of legacy student systems. In contrast, if SIS is implemented first, it can be programmed flexibly to include both quarter and semester calendars.
2. We recommend that Ohio State pay faculty contemporaneously with work performed. Under semesters, new faculty will begin teaching early than under quarters. If the semester calendar begins in mid-August, then faculty and must receive one-half month's pay at the end of August, followed by monthly payments through July, and concluding with another one-half month's payment on August 16. If the semester calendar begins in late August, then monthly payments starting at the end of September are appropriate.

If in the year prior to the conversion, continuing faculty are paid according to the currently standard schedule; that is, the first paycheck is received at the end of October, then during the conversion year continuing faculty must receive an additional paycheck for either 1 or 1.5 months depending on when the semester begins. The implication is that the university, if it converts to semesters, must bear the cost of an extra payment to continuing faculty. Georgia and Cleveland State adopted a model similar to the above. Florida paid two months of summer salary to faculty. Minnesota pays faculty over nine months, thus the pay schedule during the conversion summer was not an issue. While our information indicates that Ohio State fully budgets for the cost of faculty in the fiscal year corresponding to when faculty teaching, the above change must be planned for because it changes the timing of the payments to faculty.

An acceptable alternative solution is to speed salary payments to faculty in the year prior to the conversion; for example, paying the full amount of the annual salary over 10 or 11 months instead of 12. Then no double payments would be needed. The university must plan for this expense.

3. Our analysis suggests that the university is at risk of losing some tuition and significant state subsidy revenues following conversion. This outcome has been observed at other converting universities. We recommend that the university not convert to semesters until it can afford the loss in tuition and subsidy revenues without negatively impacting the goals of the Academic Plan. One way to ensure against this loss would be to create a significant “Conversion Fund” in the neighborhood of $40 million prior to conversion to semesters.

4. Our analysis suggests that adopting 5 credit hour semester courses may reduce the breadth of our students' curricular experience, perhaps substantially. Overall, students will select many fewer total semester courses in their college curriculum than quarter courses if semester courses remain at 5 credit hours. The range of pure electives, electives within a major, and perhaps GEC courses will be reduced. In some cases, it is likely that a three course sequence of 5 credit hour-quarter courses will convert to a two semester sequence and breadth will be maintained even though the number of courses is reduced.

However, if we convert to 3 and 4 credit hour semester courses, some colleges are likely to have significantly lower enrollments. Combining this outcome with the proposed Budget Restructuring model (start date July 1, 2002) implies that colleges with a substantial percentage of 5 credit hour courses may suffer fiscal losses.

We recommend that the conversion to semesters have a neutral impact on college budgets. We are particularly concerned that the incentive program built into Budget Restructuring will negatively impact colleges converting 5 credit hour courses to 3 and 4
5. We recommend that conversion to semesters be neutral in terms of class sizes. Observation of converting universities suggests that upward pressure on class sizes will occur, but it can be resisted. Increasing class sizes is inconsistent with the Academic Plan's goal to better serve students. Also, increasing wait lists is inconsistent with the Plan's goal to reduce the number of students closed out of courses.

Similarly, we recommend that conversion to semesters have a neutral impact on faculty and GTA teaching loads. Comments from faculty suggest that, in some colleges, teaching loads are defined in terms of annual courses taught. Conversion to semesters will put upwards pressure on teaching loads, especially in colleges that currently teach many 3 credit hour quarter courses. The principle of neutrality for faculty and GTAs indicates that teaching loads should not increase as a result of converting to semesters. The solution is additional central fiscal resources selectively allocated to prevent teaching loads from increasing. The cost depends on the specific conversion of courses and curricula and what type of instructor is hired. While the range is great, the university should plan for an additional permanent expenditure of about $5 million annually to provide a mix of faculty, lecturers, and GTAs to those colleges most stressed by the conversion to 3 and 4 credit hour courses.

6. We recommend that Ohio State adopt policies that compensate for the loss of flexible research time enjoyed under the quarter calendar. One option is to grant full year sabbaticals at full pay. This system is in place at Youngstown State. About 4% of Youngstown State faculty participate annually. A similar program exists at Wright State where about 1.5% of faculty members receive supplemental awards that, in effect, raise the pay for a year-long sabbatical to 100%. For reference, at Ohio State about 1.5% of the faculty take a sabbatical each year.

Another option is for Ohio State to adopt a program that combines a standard sabbatical (2/3rd's salary for a full year leave and full salary for a one-semester leave) with a new Faculty Research program. This program, which differs from the current sabbatical and SRA program, was adopted by the University of Minnesota when it converted to semesters. It centrally funds approximately 4% of faculty per year to conduct research at full pay during a semester, compensating for the lack of flexibility under the semester model. This new program should augment the existing Special Research Assignment program. The additional cost of the Faculty Research program consists of covering the courses that would have been taught by the faculty members participating in the program. Central administration should pay this cost.

7. We strongly recommend that the Tuition Option Payment Plan program expand to help all students needing assistance spread their tuition and fees payments over the semester term.

8. If we convert to semesters, it is likely that we will need new sources of summer term enrollments to offset the decline in summer term full-time students. We recommend that the Admissions Office invest in attracting Ohio State summer semester both K-12 teachers and undergraduate students who attend other semester based universities during
Report of the Faculty Issues Subcommittee

Subcommittee Members: Steven Fink (Chair), Julie Carpenter-Hubin, Grady Chism, Ken Kwock, Brian McEnnis

Issues
The principal questions that our sub-committee has addressed regarding the potential effects of a conversion to a semester calendar are

- What will the impact be on faculty teaching loads?
- What will the impact be on research leave/support (e.g., Special Research Assignments, Faculty Professional Leaves, college grants, etc.)?
- What will the impact be on staffing needs and/or class size?
- What will the impact be on faculty and graduate student recruiting and retention?

Data
All of the factors listed above vary significantly, not only among institutions, but across individual campuses, including OSU’s. Different colleges have far different average teaching loads, different criteria and resources for research support, different class configurations, etc. And regional campus practices differ from Columbus campus practices. To establish a model and formulate recommendations, we

- assessed current practices at OSU;
- assessed current practices at our benchmark institutions (whether on semesters or quarters) through surveys of college deans and anecdotal reports;
- assessed past and current practices at institutions that recently converted to semesters, through surveys of college deans and anecdotal reports;
- reviewed relevant literature on academic calendar conversion;
- held a mini-conference on calendar conversion for all interested OSU parties (April 3, 2001). In addition to members of the Calendar Committee and Alan Kalish, from the OSU Faculty and TA Development Office, the following guests from recently converted institutions provided information and answered questions:

**University of Minnesota**
Ann Waltner, Professor of History and former Associate Dean of the College of Liberal Arts; chair of the Curricular Conversion Committee
Kate Maple, Director of Student Services, College of Human Ecology

**University of Georgia**
Bill Barstow, Professor of Botany and member of Conversion Committee
**Cleveland State University**
Everett Cataldo, Professor of Political Science and chair of semester conversion committee

**Michigan State University**

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• held informational forums with faculty from the different colleges and other faculty constituent groups across campus—including regional campus faculty (April, 2001).

Parameters, Constraints, Definitions
Our assessment is based on the assumption that semesters will be about 15 weeks of instruction plus one week of exams. We also assume that there will be a full, but compressed summer term (e.g., an 8-week term, analogous to our current 5-week summer quarter). A possibility, but not an assumption, is that there could also be a short 3-week term, either between fall and spring semesters, or between spring and summer terms. We assume that under-semester students would need 120 credits to graduate (comparable to 180 quarter credits; note that this assumes a reduction from our current 191 required quarter credits (this number may vary depending on the program), but our assumption is that this requirement would be reduced under either calendar model). The impact of conversion on such factors as teaching load, class size, and staffing needs will vary somewhat depending on the conversion model adopted. The two dominant models are the Constant Format Model (in which credit hours remain the same in conversion, but course content is then expanded by roughly 50%, commensurate with the increased term length and number of class meetings) and the Constant Content Model (in which course content remains the same but is covered over a longer term, and so requiring a reduction in credit hours). A 5-credit quarter model would become a 3-credit semester course under this model. The Constant Format model does not work well for 5-credit courses, and 5-credit semester courses are rare at universities on the semester calendar. Conversely, the Constant Content model does not work well for converting 3-credit quarter courses. Under our current system at Ohio State, credit hours per course vary greatly, with the norm varying considerably from college to college (e.g., the College of Humanities teaches almost entirely 5-credit courses; the College of Biological Sciences and the College of Engineering teach mostly 3-credit courses). Therefore we assume that conversion will involve a hybrid of the Constant Content and Constant Format models, the emphasis varying across colleges depending on current practice. We should note that at the University of Minnesota, units were strongly urged to adopt a 3-credit semester course model across the board (i.e., transforming a widely variable quarter-credit system to a uniform semester-credit system). Responses from faculty and administrators at Minnesota suggest that this was too inflexible, with various negative consequences in terms of both curriculum and costs. So that while we do assume that a hybrid conversion model will be most appropriate for Ohio State University, we do not assume a rigidly uniform result in terms of semester-credit hours per course—some courses will fit well into the 3-credit model, but there will quite possibly be cases in which courses will be most effectively packaged as 2-, 4-, or 5-credit courses. The number of semester credits assigned to any given course will have to be justified within the program as part of the overall implementation process, and keeping in mind the general principal that the conversion should preserve a program’s instructional hours—that is, the total amount of instruction offered by each program over the course of an academic year should be approximately the same under semesters as it is on quarters.

Assessment of Expected Impacts on the Curriculum
A conversion from quarters to semesters should be neutral in terms of the total intellectual content of programs and in terms of the total instructional hours offered by programs over the course of a year. (Conversion may, of course, be an occasion for improving the content of a
program; the principle here is that calendar conversion, in itself, should not compel any reduction or impoverishment of the overall program.) The distribution and "packaging" of this content will, of course, change, however: one way or another, units should expect to reduce the total credit value of their curricula by approximately one third (as the total number of credits to graduate goes from 180 to 120)—by a combination of reducing the number of courses and reducing the number of credits per course. Under a strict application of the Constant Format model, credits per course would be unchanged, so the total number of courses offered in the curriculum would need to be reduced by 1/3 (though material covered in each course would increase by 50%). Under the Constant Content model, the total number of courses would remain unchanged, with no change in material covered, but a 33% decrease in the credits offered per course. Since we envision a conversion that would draw variably upon both models, depending on current credit distribution and course content within each unit, we anticipate an overall reduction in the number of courses but of something less that the 33% required by a strict Constant Format model. In general, departments could expect a reduction in the number of highly specialized courses offered. Any loss here could be offset to some extent by the use of a 3-week "mini-semester" between terms, which might be particularly well-suited for teaching special topics not covered by the regular curriculum.

Many of the most highly ranked research institutions are on the semester calendar, so clearly a viable curriculum is entirely possible under that system. The process of converting from one calendar to another will require a substantial short-term investment of time and money. From the faculty point of view, the chief concern is how much faculty time will be diverted from other activities (e.g., research) to implement the conversion. Will a conversion to semesters, in the long run, sufficiently contribute to the fulfillment of our Academic Plan to justify the short term loss of time and resources? There is no quantifiable answer to this question, and—as with almost every issue related to the conversion—impacts will vary from college to college across campus.

At least two factors are relevant to the entire university community, however: 1) A semester calendar will bring us into conformity with 85% of the U.S. research institutions and a majority of Ohio public four-year universities; 2) Ohio State University is currently undergoing a curriculum review, including credits-to-graduate requirements and the General Education Curriculum. If we are going to convert to semesters, it will be important to coordinate the conversion with the curriculum review. When OSU last considered a calendar conversion, the University had just completed the implementation of the GEC, and the calendar committee therefore felt that the timing was poor for converting calendars and overhauling the curriculum yet again. This time we are entertaining the question of calendar conversion at a very opportune moment in relation to curriculum review. If we do not convert to semesters at this time, we will certainly need to allow a substantial period of time to elapse before the issue could seriously be entertained again.

Other factors affecting curriculum are included in the assessment of impact under teaching, below.

**Assessment of Expected Impacts on Teaching**

***Pedagogy***: There is no conclusive empirical data supporting the preferableity of one calendar model over the other in terms of learning outcomes; nevertheless, experience, anecdotal information, and common sense allow some claims to be made about each model. In general,
semesters are perceived as preferable for courses that involve extensive reading and/or require the development of substantial research projects or papers. These advantages are seen as being even greater for graduate education than for undergraduate instruction. Quarters are perceived as preferable for courses that emphasize the acquisition of factual data or discrete skills. These advantages are seen as even greater in programs where discrete skills or areas of knowledge are required prerequisites for advancing along a prescribed sequence of courses. Not surprisingly, therefore, preferences across this, and other, campuses are sometimes sharply divided, depending on the nature of the program and pedagogical practices within the disciplines. Advantages and disadvantages will not be recognized or valued equally across disciplines. Granting that these are not uniformly applicable, then, we can say that among the perceived teaching advantages for faculty under a semester system are the following:

- Most textbook are written for semester courses;
- Fewer start ups, registration periods, forms, supplies, etc.;
- Fewer Final Exams (This assumes a reduction in courses taught per year);
- An Extended time period (i.e. 15 vs 10 weeks) for students to do sustained research and writing (including making the use of Interlibrary Loan, ObisLink, etc. more practicable), and additional opportunities (weeks 10-15) for submission and revision of papers and projects;
- An extended time for students to digest and master material (This assumes the adoption of the constant content model and would not apply to constant format conversions);
- The potential for more sustained interaction between faculty and student;
- An extended time period for working outside of class with students to correct difficulties.

Among the perceived teaching advantages for faculty under the quarter system are the following:

- Greater scheduling flexibility over the course of a year;
- More opportunities to teach highly specialized courses; greater diversity of courses offered.
- Easier to sequence courses;
- Avoiding the (potential) tedium of the longer term.

Teaching Loads: The impact of a calendar conversion on teaching loads should be neutral. The simplest and most widespread means of measuring teaching load is by the number of courses taught per year, and in principle neutrality would mean reducing the number of courses taught per year per faculty member by 1/3. However, teaching loads for faculty, GTAs, and other instructional staff are not standardized or uniform across campus under our current structure; and while counting courses taught per year is currently the predominant method of measuring teaching loads at CSU, teaching loads can be (and in some cases are) measured by different criteria from college to college (credit hours, contact hours, weeks per year, etc.). It is therefore difficult to say exactly what “neutrality” will mean in some cases. Using courses per year as a measure, a faculty member who teaches 6 courses per year under quarter would teach 4 courses per year under semesters; if he/she teaches 3 courses per year under quarters, he/she would teach 2 courses per year under semesters. If a faculty member currently teaches 5 courses per year, under semesters he/she would be expected to teach 3.3 courses per year. In practice, 5-course loads could be converted to 4-course loads (as they were in at least some colleges at Minnesota). If teaching load is measured strictly by courses per year, a more “neutral” way of converting would be to expand the measure of teaching load to multiple years—so that this faculty member would teach ten courses over a three-year period (e.g., 4.4-2, with a semester off every third
year). Teaching loads could be adjusted over a three-year period to make any teaching load conversion neutral for this 2/3 courses per year model. Thus, a "neutral" conversion for faculty who currently teach 4 courses per year under quarters would mean teaching 2.66 courses per year under semesters, so using a 3-year unit as a basis could again eliminate the apparent increased teaching load of going to a 3 course per year semester load: over the course of three years, this faculty member would teach eight courses (e.g., 3-3-2, with a semester off every third year).

On the other hand, there may clearly be other factors involved in assessing teaching load. For example, a shift from five 5-credit courses per year to four 3-credit courses per year could be understood as increasing the number of weeks of teaching (10 weeks/course x 5 courses = 50, versus 15 weeks/course x 4 courses = 60). But if we measure the same conversion in terms of contact hours, there is a substantial decrease: If a 5-credit course has 5 contact hours per week—or 50 hours per quarter—then a 5-course annual load = 250 contact hours per year; whereas four 3-credit (and 3 contact hours per week) courses = 180 contact hours per year. Even for those 5-credit quarter courses that actually only have 4 contact hours per week, the annual total contact hours = 200, which is still greater than the 180 under a 4-course semester load. Moreover, a conversion from 5 quarter courses per year to 4 semester courses per year, regardless of credits or contact hours, means a reduction in the absolute number of annual class preparations and final exams, and (depending on how courses are designed) there may also be a reduction in the total number of papers, quizzes, and mid-terms to grade, etc. Some faculty (or administrators) may therefore consider this a sufficiently fair, "neutral" trade-off regardless of the apparent increase measured by the 2/3 conversion of courses per year. This difference will be less compelling for faculty who teach large lecture courses and have GTAs grading papers and exams; for faculty who grade many papers and exams in their courses, this difference would be very substantial.

We should also note here, however, that depending on the conversion model used, there may be pressure to increase class size in some courses, which would off-set the reduction in teaching load that comes as a consequence of teaching fewer courses per year. We must therefore carefully guard against raising enrollment ceilings in converting to semesters. The alternative to increasing class size would be to offer more sections of certain courses, but this would requiring either additional hiring—and so additional expenses—or succumbing to pressure to offer fewer specialized, or non-core courses. The temptation to offer fewer specialized, non-core (and so lower enrollment) courses may be further exacerbated by the adoption of an enrollment-driven budget model. Succumbing to such pressures will not serve the students or the Academic Plan for the University. We need to recognize that in some cases converting to semesters will require additional staff, then, if the overall program is not to be impoverished or constricted by conversion. Even in this case, if hiring additional instructional staff means hiring lecturers or more GTAs rather than regular faculty, one consequence will be a reduction in the percentage of total university courses taught by regular faculty—a change that also runs counter to the broad goals of the Academic Plan.

The impact on teaching loads for Graduate Teaching Assistants is also complicated. A simple courses-per-year conversion would have GTAs who currently teach 1 course every quarter (a 50% appointment) teach 1 course every semester. This will present significant budgetary and logistical difficulties, however, particularly in the staffing of such courses as English 110, a course required of virtually all first-year students, and which has an enrollment ceiling (of 25 students) per section because it is a writing course (Other courses, such as foreign language classes, would be similarly, though perhaps less extremely, affected). If, under semesters, all first-year students are required to take a 1-semester writing course, in order to accommodate the
same number of students each year, there would either need to be a 50% increase in class size, or a 50% increase in the number of sections taught each semester. It is almost certainly safe to say that a 50% increase in class size is not acceptable. It is conceivable that we would exempt more freshmen from the requirement (especially as we move to full selective admissions), but this would necessitate a substantial re-thinking of the GEC philosophy and practice, and it is unlikely, in any case, that we would exempt 1/3 of those students now required to take the course. Consequently, the increased number of sections could be accomplished by increasing GTA teaching loads to 2-1 (or 1-2), by eliminating other courses taught by GTAs (e.g., 367, the second GEC writing course) and pulling them into the additional sections of English 110, or by hiring more GTAs (or lecturers). Each of these solutions creates further problems. Hiring more GTAs is obviously expensive—perhaps prohibitively so—and if graduate programs are not willing to grow in order to provide cheap staffing for introductory courses (so they should not be forced to do so), then this would mean hiring still more part-time, non-tenure track instructors, exacerbating an already significant problem in higher education. Pulling GTAs out of other courses could have a significant impact on both the GEC (or other aspects of the curriculum) and on the quality of graduate teacher training/experience. Converting GTA teaching loads to 3 semester courses per year is certainly the cheapest response, and this can be rationalized as a neutral conversion in terms of the absolute number of courses taught, in terms of contact hours, and in terms of total number of students taught; but it would be a 50% increase in the total weeks taught per year (from 30 to 45), and the semester in which they are teaching two courses would undoubtedly affect their own rate of progress as students and researchers. Moreover, this solution would certainly affect our ability to recruit and retain the most attractive, competitive graduate students, though it would not be entirely inconsistent with current practice at other semester institutions. Among other CIC institutions, graduate teaching loads vary considerably, from 2.5 courses per semester (5 courses over 2 years [Penn State]), to 2 courses per semester (Illinois), to 3 courses per year (2-1 or 1-2 [Iowa, Purdue, Indiana]), to 1 course per semester (Wisconsin, Michigan, Minnesota). It is particularly significant that Minnesota (the most recent convet, and a benchmark institution) was able to convert to a 1-1 teaching load for GTAs. Our understanding is that they were able to do this by dropping a required junior-senior writing course and with some additional funds. The most clearly "neutral" conversion factor, and the one most consistent with the ambitions of the Academic Plan, would be to go to a 1-1 teaching load for GTAs, but this would involve considerable costs of one kind or another.

Assessment of Expected Impacts on Research

Inter-University Cooperation. One argument offered for conversion to semesters is that aligning our calendar with that of 85% of U.S. research institutions will facilitate our participation in a variety of research activities with those institutions; visiting faculty appointments or faculty exchanges, collaborative research projects, web-based teaching consortiums, etc. In theory, standardization certainly facilitates cooperation and exchange (so VHS won out over Betamax); tools and parts are manufactured in standard sizes; the metric system is more or less universally adopted by scientists and engineers; English is rapidly becoming the universal language for all international discourse. In practice, it is not quite so clear cut (and so America refuses to use the metric system for most everyday measures, the English still build their cars backwards and drive on the wrong side of the road, etc.). From the students' point of view, it seems demonstrably clear that transferring credits and participating in study abroad programs and in some internship programs would be easier to do if we adopted a semester calendar. It is less clear that there would be a comparable or measurable advantage for inter-university faculty cooperation. A great deal of cooperative faculty research does not actually require on site work,
nor is such cooperative work necessarily tied to the instructional calendar. It is true that if an OSU faculty member wants to accept a second-semester visiting appointment at another institution he or she would have to be released from both Winter and Spring quarter duty here, thus losing 2/3 of a year in exchange for only a ½ year appointment. On the other hand, however, the same faculty member could accept a first-semester visiting appointment at another institution and need to be released from only Autumn quarter here, thus working (and being compensated) for ½ the year at the other institution while still having 2/3 of the year (and the attached compensation) here at Ohio State. Obviously, the same factors apply to a visitor from a semester institution coming here. While there are undoubtedly cases when working on a common instructional calendar would facilitate inter-university cooperation, we have found little evidence (even anecdotal) that having different institutional calendars obstructs such cooperation.

Research Time: There are both advantages and disadvantages to the semester calendar in terms of faculty research time. Under the semester calendar, it can be argued that with fewer courses per year, fewer preparations, fewer starts and stops, and fewer exams and papers to administer and grade, faculty will have more time for their research/scholarship even during teaching terms and is years when they have no off-duty terms. When faculty do have non-teaching terms, obviously 15 weeks is more research time than 10 weeks.

In terms of scheduling non-teaching terms, the advantages or disadvantages of the semester calendar will vary depending on the standard teaching load and distribution within units. For example, under a 2/3 courses-per-year conversion model, a faculty member who currently teaches 6 courses per year (2-2-2) would teach 4 courses under semesters (2-2), and there would be no difference in the teaching year. Faculty who currently teach 5 courses per year may either be able to stack courses (3-2-0) or fulfill their teaching commitment over a two-year period (2-2-2 in the first year, 2-2-0 in the second). If these faculty were to go to a 4-course per year load under semesters (2-2), it would be impossible for them to schedule a regular semester off. Under the “neutral” conversion based on courses per year suggested earlier, however, these faculty would have an automatic semester off every third year. Over the long run, the amount of release time would be the same under both models (i.e., every six years, both would have a total of 30 non-teaching weeks—three quarters, or two semesters). While the semester off comes less frequently than the quarter off, the semester rotation may still be more attractive to some as providing more sustained, flexible, and productive research time when it is available. For faculty who currently teach 4 courses per year, and who can therefore currently schedule a 2-2-0 teaching load every year, semesters will be least flexible and attractive, since a neutral conversion would put them on a cycle that provides a non-teaching semester only every third year (2-1, 2-1, 2-0). Here, the number of courses taught reaches a neutral equivalence every three years (12 → 8), but the number of non-teaching weeks equals out only every six years. There is some compensation along the way in the fact that for half of every year these faculty teach only one course, rather than 3 courses for 2/3 of the year under quarters, but we recognize the limited compensation here. For faculty who currently teach three courses per year, the conversion may be more or less preferable depending on the distribution of courses over the year. If under quarters the distribution is 1-1-1 and under semesters it becomes 1-1, there is no difference. If under quarters the load is distributed as 2-1-0, then under semesters a 1-1-1 would be less attractive, but a 2-0 would be more attractive.

While the ability to schedule research-only terms will vary depending on current teaching load and distribution, overall the semester calendar is less flexible than the quarter calendar, and this
has been one of the most consistent negative assessments from faculty at recently converted institutions. Given sufficient resources, OSU could off-set the negative impact by funding additional research semesters, whether on a competitive or rotating basis.

Special Research Assignments and all other funded research release time will be affected by a calendar conversion because it costs 50% more to buy 15 weeks of release time than 10 weeks. That is, the same number of dollars that will buy a department nine SRAs during a year under quarters will buy only six SRAs under semesters. Essentially, SRAs will become even more valuable and productive under semesters, but they will be more competitive, and fewer faculty will get them. The same principle holds true for other sources of funding release time for research, whether internal or external: it will cost 50% more to buy out a semester than a quarter, but the value of the time off in terms of productivity may frequently be more than 50% greater (This is the same premise that sees semesters as potentially more productive than quarters in the classroom, too, with less time devoted to starts and stops and other mechanical or redundant activities, and more time for sustained productive work). Of course, any negative impact can again be off-set if additional resources are committed to funding research. Sabbaticals, or Faculty Professional Leaves (FPLs), for less than a full academic year, will presumably become more expensive, either for the individual faculty member or for the University, under semesters. Since faculty can currently take a one-quarter FPL at full pay, it would cost the university 50% more to fund a one-semester FPL at full pay. Especially in light of the desire to have the calendar conversion complement and facilitate the goals of the Academic Plan, the University must remain committed to a Sabbatical policy that, at the very least, sustains current levels of support for faculty research. Put simply, whatever additional costs in funding FPLs are incurred by a calendar conversion should be borne entirely by the University rather than making FPLs more costly for individual faculty members.

Assessment of Expected Impacts on Recruiting and Retention
In our survey of Deans of colleges at recently converted universities, the overwhelming response was that conversion had no perceptible effect on the ability to recruit or retain either faculty or graduate students (One college reported a positive effect on faculty recruiting; one reported a negative effect on retention of graduate students; all others reported a neutral impact). Anecdotal reports suggest that in colleges that are inclined to approve of conversion to semesters, there is a belief—sometimes strongly held—that the conversion will aid in recruiting and retaining faculty and graduate students. Conversely, anecdotal responses from colleges that are opposed to conversion indicate a belief that the quarter system is an attractive recruiting model. While our data provides little or no evidence of any substantial impact overall, common sense suggests that disciplines that find one calendar model more congenial than the other will use the virtues of that calendar in their recruiting and retention efforts.

Conclusions
Because the University comprises a complex mixture of disciplines with different goals, methods, and resources, a conversion to a semester calendar will not have a uniform impact across campus or across the different campuses of the University.

We have found no clear-cut evidence that either calendar is superior in terms of teaching or research opportunities for the university community as a whole. If we convert to semesters, some will perceive themselves as winners, some as losers.
If teaching loads are determined by courses taught, then a neutral conversion of teaching loads over a three-year period is always possible.

Since a conversion on the basis of courses taught is not financially neutral, there will be pressure on faculty to have teaching loads determined by other measures, such as credit hours or contact hours. This will impact different units differently.

If conversion to semesters occurs and teaching loads are not increased, class sizes or the number of teachers may need to be increased. As stated elsewhere, increasing teaching loads is unacceptable and unwise. Increasing class size is also in conflict with the goals of the Academic Plan relative to the student experience. The impact of increasing class sizes and the potential to increase class size will vary widely based on pedagogy, teaching space requirements, etc. Hiring more teachers is primarily a resource issue. Thus, there may be some conflict between class size and resources that may exert substantial pressure to increase class sizes. The impact of this conflict will be greatest where class sizes are already limited.

**Recommendations**

1. We recommend that a calendar conversion be closely coordinated with the curriculum/GEC review to avoid redundant or wasted expenditure of time and resources.

2. We recommend that a change to semesters should have a neutral impact on faculty and instructional staff workload. While we recognize that workload can be measured in different ways and that “neutrality” may therefore also be assessed in different ways, we believe that the 2/3 courses per year model will in most cases be the optimal conversion standard. In all cases—whether a strict application of the 2/3 courses-per-year model or some modified version of it—we strongly recommend that neutrality of workload should be the governing principle of conversion and that the application of that principle should be clearly explained and justified by every administrative unit. This should hold true for both Columbus and regional campus faculty.

3. We recommend that a conversion to a semester calendar should have a neutral impact on research support and funding for Faculty Professional Leave. Moreover, where there is a clear loss of flexibility in scheduling research time, we recommend that the University devise some compensatory strategies (these might include more generous funding for FPLs, a Faculty Research program that would augment existing SRAs, etc.).

4. We recommend that a conversion to semesters has a neutral impact on class size. This is perhaps less crucial in terms of already large lecture classes, but it is important that class sizes should not be increased in classes that currently have enrollments ceilings.
Report of the Student Issues Subcommittee

Membership: David Stetson (Chair), Joe Barr, Julie Carpenter-Hubin, Beth Greene-Costner, David Lieberman, Margaret Strawn

What are the various student cohorts that may be differentially affected?
The committee began its deliberations by trying to identify the diverse groups of students studying at The Ohio State University. We recognized that some of the effects of a conversion of the academic calendar would be quite universal, but we also recognized that different students would be affected in different ways. In order to assess what the effects may be, we wanted to sample the sentiment from as many of those identifiable groups as possible. Table 1 defines the groups that we considered throughout the process.

<table>
<thead>
<tr>
<th>Subject Group of Students</th>
<th>Undergraduate</th>
<th>Graduate</th>
<th>Professional</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main Campus</td>
<td>Full-time</td>
<td>Part-time</td>
<td>The Agricultural Technical Institute</td>
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<tr>
<td></td>
<td>Resident</td>
<td>Commuter</td>
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<tr>
<td>Traditional</td>
<td>Non-traditional</td>
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<tr>
<td>Regular</td>
<td>Continuing Education</td>
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<tr>
<td>Transfers In</td>
<td>Transfers Out</td>
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<tr>
<td>International Students</td>
<td>P-12 Teachers</td>
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<tr>
<td>Student-Athletes</td>
<td>Enrolled High School Students</td>
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We sought to schedule meetings with representatives of these cohorts and had variable success. A town meeting was held with the general undergraduate population on 16 April; a presentation with a question-answer session with representatives of the committee was placed on the agenda of a regular meeting of the Council of Graduate Students on 6 April; two representatives of the committee made a presentation and accepted questions at an open forum for the regional campuses at Marion on 6 April; one representative met with students of the College of Food, Agricultural, and Environmental Sciences on 5 April. The InterProfessional Council did not meet with members of the committee, but they did discuss the issue at a regular meeting of the council. The consensus of those present was in favor of semesters. [Of course, the Law School is on a semester system already.] No students attended the open forum held at the Marion regional campus, so we have received little input from regional campus students.2 Numerous

2Faculty at The Agricultural Technical Institute (ATI) in Wooster are emphatically in favor of remaining on quarters. One member of the subcommittee interviewed two graduate students from ATI, both of whom had come from semester schools; both were strongly in favor of semesters because of a slower pace and more in-depth learning experience.
informal discussions were held with students at various times. No issues specific to commuters were identified.

It is clear that most of the undergraduate students enrolled at Ohio State do not favor a change to semesters. A recent poll conducted by the Undergraduate Student Government showed that 79% of undergraduate students favored quarters when asked if they would like to change to semesters. When similar polls have been taken of graduate students, a smaller majority (approximately 70%) usually favors semesters; many graduate students were undergraduates at semester institutions. (See 1992 Ad Hoc Calendar Committee Report, Addendum 3.) It is clear also that most undergraduates enrolled at Ohio State now will not be affected if the institution changes its academic calendar. Nevertheless, our students have a particular perspective on their education and they can help us identify some issues that should be used to inform the Ad Hoc University Calendar Committee’s recommendation and others that must be addressed in a possible conversion.

What are the advantages of quarters and semesters to students?

Although there have been to our knowledge no controlled, empirical studies of the various merits of quarters and semesters, many anecdotal accounts are presented in several publications, most coming from other institutions that have converted. In general, the outcome for students at those institutions is not well described in the documents. Most of the “facts” we cite throughout this document are derived from those documents, anecdote, and personal testimony.

What are the perceived advantages of quarters?

- There is a greater diversity of courses available.
- Sequenced courses can be scheduled more flexibly.
- Fundamental, introductory courses are offered more often, therefore scheduling is easier and classes are smaller.
- Students will receive instruction from more instructors.
- The pace of courses is fast, fostering greater attention to the material, avoiding boredom or “burn out” at the end of the term.
- Students can focus on particular aspects of their major because a greater number of advanced courses are offered.
- For students who failed a course, another opportunity to take that course often comes sooner.
- For students who, for one reason or another, are forced to miss a term (for example, to work in order to have the funds to return to school), resumption of the college career can occur sooner. Because there are more opportunities to drop in and out, time-to-degree may be shortened for part-time and transient students.
- Annual payments are made in three smaller sums rather than two larger amounts.
- For part-time students, a ten-week commitment to a course is easier to schedule than a 15-16 week commitment.
- Classes do not begin until late September, so the heat of August and early September is avoided in classrooms and dormitories.
- Students are on campus for the sunny and warm parts of the spring; this encourages participation in intramural sports.

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What are the perceived advantages of semesters?
From Winona State University’s conversion web site:
http://www2.winona.state.edu/~scott/semcon/home.html

The semester calendar offers many advantages:

- **Academics:** more time in each course makes possible more comprehensive and in-depth learning and a better opportunity to "rebound" from a poor start in a course.
- **Transfer:** greater compatibility with a larger number of institutions’ calendars and curriculums.
- **Textbooks:** most textbooks are designed for semesters, more of each book will be used and most students will have fewer books to purchase. (This last point is perhaps inaccurate and certainly debatable.)
- **Time, registration, fee payment, grading and financial aid activities are reduced to only twice per academic year.**

In addition to the above, we have identified the following additional potential advantages:

- Students come to know their faculty and classmates better.
- Longer and more in-depth projects and readings, including research projects, are possible.
- More time is available to use the informational resources of the institution, especially the libraries and interlibrary loan.
- There is greater opportunity for students to ruminate on the material being learned.
- There is greater opportunity for students to be evaluated and for that evaluation to be communicated to them.
- Term papers can be reviewed and rewritten more easily.
- Competition for summer jobs, internships, coops, and first jobs on graduation is more successful because it is on cycle with other schools, therefore with the schedules of hiring companies.
- A student who, for one reason or another, is forced to miss a block of classes will miss less material and will have more time to make up that material.
- Opportunities for study abroad are enhanced because most participating institutions are on the semester calendar.
- Because the semester is longer, the likelihood is reduced that exams in different courses will coincide. [There is some disagreement on this.]
- Because there are fewer opportunities to drop in and out, and dropping out carries heavier financial and educational penalties, time-to-degree may be shortened.
- For athletes, season and tournament schedules tend to be set in accordance with the prevailing semester calendar.
- Classes are finished in early to middle May, so the heat of late May and early June is avoided in classrooms and dormitories.

What are the issues of concern?

A. **Advising before and during the transition**

- Quarter hour-to-semester hour conversion
- Course load
- Time to degree

Conversion from the quarter-based academic calendar to semesters is a sweeping change for students. With conversion come changes in the number of courses available and the content of courses. Because only two semesters are offered in the academic calendar, the number of courses
taught per year per faculty member is likely to be reduced, and possibly reduced by as much as one-third, unless courses are restructured dramatically, additional instructors are hired, or the workload for the existing faculty is increased dramatically. Because introductory courses will be offered two times a year rather than three, the number of students enrolled in each term will increase; thus, class size increases or the number of sections of the class must increase.

In addition to the loss of courses, the remaining courses will be changed during the transition. Often, new courses within semesters are augmented versions of courses that had been offered while on quarters, so the content of those courses will have changed during the transition. Perhaps as often, quarter-system courses are simply stretched out to fill the semester without additional content. Also, the credit-hour value of courses may change simultaneously. Conversion will cause all academic units to examine and reduce their course offerings and to change the overall degree requirements for majors in those units. For students who begin their careers on one system and finish it on the other, translation of the credit-hour and course requirements for graduation may become muddled. This is the experience now of students transferring to Ohio State from a semester school or from Ohio State to a semester school. Conversion to semesters will place all of the enrolled Ohio State students in that situation.

A change to semesters will require changes in the academic habits of students. On both systems, quarters and semesters, full-time students usually take between 12 and 20 credit hours per term. In our quarter system, many courses carry five credit hours and meet five days per week for 45 minutes per meeting, so a full-time load is often three courses. At most institutions using the semester calendar, courses tend to be three credit hours, meeting three times per week for approximately 50 minutes per meeting, so a full-time load is five courses. Students studying under the quarter system typically take three courses per term and therefore take 3*3*4=36 three, four, or five credit-hour courses in a four-year college career, students on a semester system generally take 3*2*4=40 three credit-hour courses in an undergraduate career. Other institutions that have converted recently have found that students do not adjust quickly to the expectation that they will enroll in five courses per term. This tends to slow students on the path to graduation. To smooth the transition for students, converting schools have put in place an expanded advising system consisting of additional, well-prepared advisors, how-to manuals describing the changes in majors, courses, and expectations, and web sites with similar advising information. Advertising in local publications also alerted students to the impending changes and the need to contact an advisor.

Although changing of student habits may occur slowly, experience in some institutions suggests that students may be more likely to complete a degree. Cleveland State University has seen an increased retention of students, especially first-year students, from first to second semester, compared to their retention from first to second to third quarters before the transition there. Similar improvements in retention were not seen at Michigan State University. At the University of Minnesota, the outcome is unclear because their conversion is so recent.

The semester system reduces the number of terms per year and lengthens each term, obviously. Any student enrolling in school knows that the commitment to any term is greater and failure to complete a term will impose greater delay in completing a degree by a full semester (four months). Students will tend to remain enrolled in the two semesters within a year to avoid that delay. On a quarter system, a student can skip a quarter and be delayed in his/her progress by only three months, one of the perceived advantages of quarters to students, but a decision that
can be taken more lightly, perhaps, than the decision to skip a semester. Time-to-graduation may be extended for more students on the quarter system than on the semester system, as the retention and graduation rate at Ohio State and our analysis might suggest. Likewise, students on quarters may change majors more casually than students on semesters because required courses in the new major can be begun perhaps in the next quarter, not waiting until the next semester. This also might tend to delay graduation in small increments.

The lengthened commitment represented by semesters may have a negative impact on the enrollment of part-time students, students such as university employees, older, non-traditional students, and public school teachers taking evening courses. The increased commitment may cause scheduling difficulties for those students because they must clear perhaps 16 weeks on their calendar, not 11. This can have a profound impact on their progress. (See recommendation 2.)

B. Cost

- Size of payments
We have no reason to assume that annual tuition and fees will decrease if Ohio State should convert to the semester calendar. Therefore, students will pay two bills for tuition and fees rather than three in a traditional academic year. Those bills will each be larger on semesters than they would be on quarters. Some students may have difficulty paying larger lump sums. The Tuition Option Payment Plan is available currently to enable students to spread out their payments. This program could see increased enrollment if we convert to semesters.

- Textbooks
At other institutions that converted from quarters to semesters, bookstores reported a drop in sales, implying that students bought fewer textbooks on semesters than they had on quarters. If students had taken 36 courses for a degree under quarters and then took 40 under semesters, it is not clear why textbook sales should drop. If, however, students continued to take three courses per term, they would have taken only six courses per year immediately after transition, rather than the expected 10. This would have caused a drop, and would have represented a savings to the students in dollars per year, but a loss in time-to-degree.

C. Diversity of courses
With the loss of one term per year, faculty that had taught, for example, two courses per quarter for three quarters likely would teach two courses per semester for two semesters. If all faculty reduced the number of courses they taught by one-third, there is a one-third decrease in the number of courses taught per year at the institution. The courses that would be dropped from the catalog and those not offered would be the upper-division, specialty courses with small enrollment. Larger, lower-level courses that represent greater income to the units would be preserved, especially in the climate of budget restructuring. Thus, depth, diversity, and smaller classes would be lost from the curriculum on a change to semesters. The only ways to preserve diversity on a standard semester system are to increase the number of instructors or have existing faculty teach more. However, many universities have modified the semester system by adding a three- or four-week “minimester” in January or May and by offering half-semester terms as OSU does for summer quarter. With improved scheduling software, these modifications to the “standard” semester and the addition of flexibly-scheduled courses are possible.
D. Availability of courses
Many courses, particularly popular introductory courses, are offered each term: three times per year on quarters and twice per year on semesters. Unless more sections of a course are offered, requiring more instructors, or larger sections were allowed, students would experience reduced access to the courses they need when on the semester system. If class sizes increase, students would experience reduced access to the teaching staff and the general atmosphere of the course would deteriorate. If space is not adequate for enrollments, class sizes cannot increase. If instructors are not available, sections cannot be added. Our desire to reduce the number of closed sections and selective-admission majors would not be served.

E. Pace of courses
One of the strongest assertions we have heard from other faculty members who have taught on semesters and from students who have transferred to Ohio State from semester schools is that the pace of life is slower on semesters. Students have more time to assimilate and incorporate information, they have more time to prepare and perfect written works, they can engage in longer research projects, and they can come to know their faculty and colleagues to a greater depth. The other side of the coin: if a student hates a course, dislikes the instructor, or succumbs to distraction, the longer semester can be torture and the outcome turns negative.

Coexistence of exams
With the short, ten-week quarter, the likelihood of midterm exams in courses occurring in the same window of time is increased. However, in the semester system, the longer period of time might allow for more randomness in the scheduling of exams. One confounding factor is that one normally takes five courses in a semester, so the chance of coincidence is increased to a level very similar to that of quarters. There may be no advantage to either system here.

Stress
For many people, an increased pace is stressful and quarters are too fast. For others, the fast pace of quarters keeps them engaged and alert.

Motivation and boredom
See above.

Quarter system carries with it one additional set of course beginnings and endings. Often, beginnings are inefficient for teaching because students must be introduced to the syllabus, and attendance and enrollment must be checked. At Ohio State, at least in upper-division undergraduate courses, endings are disrupted by senior finals. A reduction in these disturbances would help the educational process.

G. Duration of commitment
P-12 teachers, non-traditional students, and part-time students very often have conflicts with full-time jobs. Many more traditional students also are employed at or near full-time. Increasing a term to 16 weeks (15 weeks of classes and one week of final exams) will increase the likelihood that a course will conflict with work.
H. Study abroad

Nearly 100% of the schools outside of the United States are on a semester calendar. Given that 85% of US schools are also on semesters, most of the cooperative programs for foreign study are scheduled for semesters. This presents few problems to Ohio State students during the autumn quarter. They simply leave for their foreign institution well before they would begin autumn quarter here; they return home about the same time as they would finish the quarter here. If they were to study abroad during the spring semester, however, they would be given credit usually for one quarter’s progress on transfer of courses and they would miss one entire term here. Thus, few students participate in study-abroad programs in the spring. Also, many summer study-abroad programs are sponsored by other (semester) institutions; therefore, they often begin in early June when our students are in the last week of classes or final exams.

Table 2 presents data supporting the hypothesis that studying abroad is hampered by the quarter system. It presents data concerning the rates of students’ participation in study-abroad opportunities at other Big Ten and benchmark institutions. Of the four schools with the lowest participation, three (Ohio State, University of Chicago, and Northwestern) are schools on the quarter system. The fourth (Purdue University) is on semesters, but is dominated by engineering students.

<table>
<thead>
<tr>
<th>Institution</th>
<th>1998 Rate</th>
<th>1999 Rate</th>
<th>Avg 98-99 Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Michigan State University</td>
<td>17.50%</td>
<td>18.80%</td>
<td>18.20%</td>
</tr>
<tr>
<td>University of Wisconsin-Madison</td>
<td>12.00%</td>
<td>13.90%</td>
<td>12.90%</td>
</tr>
<tr>
<td>Indiana University-Bloomington</td>
<td>11.80%</td>
<td>13.10%</td>
<td>12.50%</td>
</tr>
<tr>
<td>University of Iowa</td>
<td>10.50%</td>
<td>11.90%</td>
<td>11.70%</td>
</tr>
<tr>
<td>University of Illinois at Urbana</td>
<td>9.80%</td>
<td>10.70%</td>
<td>10.20%</td>
</tr>
<tr>
<td>University of Michigan-Ann Arbor</td>
<td>8.30%</td>
<td>10.50%</td>
<td>9.60%</td>
</tr>
<tr>
<td>Pennsylvania State University-Main Campus</td>
<td>9.00%</td>
<td>9.40%</td>
<td>9.20%</td>
</tr>
<tr>
<td>University of Minnesota, Twin Cities Campus</td>
<td>9.10%</td>
<td>8.80%</td>
<td>9.00%</td>
</tr>
<tr>
<td>Ohio State University, Main Campus</td>
<td>8.40%</td>
<td>8.50%</td>
<td>8.45%</td>
</tr>
<tr>
<td>University of Chicago</td>
<td>6.15%</td>
<td>6.10%</td>
<td>6.10%</td>
</tr>
<tr>
<td>Purdue University, Main Campus</td>
<td>4.30%</td>
<td>5.30%</td>
<td>4.80%</td>
</tr>
<tr>
<td>Northwestern University</td>
<td>1.90%</td>
<td>5.80%</td>
<td>3.90%</td>
</tr>
</tbody>
</table>

1. Loss of income during the shortened summer of conversion
Many of our students support their own college educations. Their full-time employment during the summer is often crucial to their enrollment during the next academic year. After the transition to semesters, the length of time they can work during the summer will not be different than it is now on quarters. At the time of transition, however, the summer between the last quarter and the first semester would be shortened by one and a half months. Some students may not be able to accumulate enough money to return to school in the autumn.

2. Competition for jobs
   • Summer

Ohio State is one of the last schools to release its students to the employment pool each summer. Some students have complained that most of the choice summer jobs are filled by the time they
become available. This situation is not universal, however, especially for students who return to previous jobs or who plan ahead during the academic year.

* After graduation

Most large companies that recruit on campuses, particularly in engineering, tend to hold job fairs in August and September at other institutions. By the time Ohio State is in session and the recruiters come here, the companies have long lists of candidates; Ohio State students tend to be at the bottom of those lists. Many believe that their prospects are reduced.

K. Professional coops

As with permanent hiring, many employees hire from both semester institutions and Ohio State, and many companies have cooperative training agreements with both semester institutions and Ohio State. Therefore, the schedules under which many of the programs operate are geared to the majority of the candidates, i.e., from semester schools. Exceptions to this rule appear to be in the employment areas of agriculture and business. Because Ohio State is the major supplier of students to agriculture in the state, employers in the state are comfortable with Ohio State's schedule. Faculty in the Fisher College of Business believe the quarter system is more appropriate for professional coops in their discipline. We did hear from one agricultural student who interned with John Deere in Kansas City that he arrived on site three weeks after the other interns. He was greeted with the promise that his supervisors would try to catch him up. At the end of the summer, his peers left in August and he continued alone for three more weeks. This student expressed some discomfort with this situation.

L. In-progress employment

Many students of all sorts at Ohio State work part-time, full-time, or over-time to support their education. A conversion to semesters may affect their ability to continue that practice. One might expect that one would be able to work fewer hours if one were taking five courses rather than three. We have no evidence that students at semester schools have greater difficulty working while enrolled. Through our process of gathering information, we asked administrative units to predict how a conversion to semesters might affect them. Many replied that their employment of students likely would improve, perhaps because there would be less turnover, less schedule disruption, and greater continuity.

M. South campus dormitories

Under semesters, autumn semester would begin in August, which in Ohio can be quite hot. The south campus dormitories are not air conditioned, while most of the others are. Air conditioning the south campus buildings would be reasonable, but expensive because they were not designed to incorporate air conditioning. The Division of Student Affairs currently intends to install air conditioning in these buildings in any case, when funds are available. The estimated cost is $16 million.

N. Transfer Students

Students who transfer to Ohio State from a semester institution confront a dauntingly large institution and a large bureaucracy. Transfer students often experience culture shock as they adapt to the higher pace of the quarter system and the realization that they cannot take as many courses in a quarter as they were accustomed to take in a semester. In addition, they must face a confusing and often frustrating task making the courses they took at their previous institution fit the Ohio State academic majors and the General Education Curriculum (GEC). The formula used by the registrar and the academic advisors to convert semester hours to quarter-hours is:

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3 sem.hr. = 4.5 qtr.hr. The registrar cannot award a fraction of a credit hour, so transfer students are awarded five quarter-hours of credit for the first three-semester-hour course transferred and four for the second. If both courses are accepted in fulfillment of a GEC requirement or a major requirement that would normally be fulfilled by two five-quarter-hour courses, the student’s progress toward a degree (19) quarter hours) is diminished. This practice contributes to the confusion and frustration that transfer students experience.

Q. International students
We have little evidence that the quarter system affects the decisions of international students in any way. According to testimony from one staff member in the Office of International Studies, the best international students who desire to come to the United States for undergraduate, graduate, or professional study often enroll in the institution that first sends them the documents necessary for obtaining the visa. Most of the institutions that can do this are in full session in August.

P. Football and basketball games and ticket distribution
Football games begin in late August or very early September. Presently, few students are on campus at that time. With autumn semester likely beginning in middle-to-late August, the entire season of football would occur with students on campus. This would change the environment for those early football games, with perhaps louder students present, and ticket distributions pattern would change. We cannot see this as a detriment to the students.

Big Ten basketball games begin in early January. With a move to semesters, winter-spring term would not begin until later in January. This means that fewer students would be on campus for those games and the structure of the student season ticket would change. This may be a small change for the worse for some.

Q. Athletes
Most NCAA schools are on the semester calendar. All football bowl games occur during the Christmas/New Year holidays. This year, Ohio State participated in the Outback Bowl on 1 January. Other important bowls occurred on 2 January. Our winter quarter began on 2 January. If we had been ranked higher, our participation in a bowl game might have hurt the attendance of faculty, staff, and students at the game, and the athletes would have missed the first, and possibly second, day of classes. As it was, the schedule this year was compressed.

Most spring sports have their league and NCAA championships in middle-to-late May and early June. Ohio State is in session and final exams; many other schools are out of session. Autumn sports like soccer, field hockey, and football begin practicing for their season in early August. The athletes are on campus from that time and are involved only in practicing. Coaches tend to hold two-a-day practices longer at Ohio State in order to sharpen the edge and to occupy the athletes’ time. The athletes can be quite tired when autumn quarter begins. Teams are responsible for the costs of housing and feeding the athletes until classes begin. This represents a considerable expense for the autumn sports.

Most autumn sports begin their regular season before students return to campus, so attendance at games and support in general are reduced early in the season. For students, the opportunities to attend fall sporting events are reduced.
Swimming schedules tend to be different than other sports. The major national and international events in swimming occur in middle and late August. Our current quarter system suits swimming just fine.

Ohio State has one of the largest, most varied intramural programs in the country. The spring is a time of great activity. Conversion to semesters will lengthen the autumn intramural program, but shorten the spring program. Some students see this as a loss in quality, because spring represents a time of renewal, but late summer is seen as a time to nap in the shade.

R. High school students
Many area high school students of high ability enroll in courses at Ohio State during their senior year. The academic calendar of all public schools more nearly parallels the semester system than the quarter system. It stands to reason that it would be more convenient for those students if Ohio State were on semesters.

Conclusions
- It is not clear to us that either system will optimize retention, time to degree, or graduation rate.
- Most features of semesters and quarters represent trade-offs, not clear-cut advantages and disadvantages. No issue is "make or break," swaying the decision in one direction or the other, although there appear to be many small advantages to semesters and maybe an equal number to quarters.
- Semesters offer certain advantages to certain groups of students through improvements of certain aspects of the educational process. Semesters offer certain advantages to certain groups of students through better coordination with the schedules of organizations outside of Ohio State. Implicit in these two statements is the understanding that quarters may also be better for some students in some circumstances.
- Flexibility is one stated advantage of the quarter system. Flexibility built carefully and deliberately into a semester system, however, may prove to be greater than the flexibility we experience now.
- Students will still choose Ohio State.

Recommendations
1. If transition to semesters is to occur, that transition will be a disruption and will engender confusion among the students. The university must anticipate as many problems as possible to mitigate the impact on students.
2. Any change must be done slowly and with sufficient planning to minimize students being closed out of courses, to maximize the ability of students near completion to complete their degree before the transition, and to allow for proper advising. If additional sections of high-demand course need to be added to accomplish this recommendation, then they should be added well before the transition.
3. The system of advising at Ohio State must be augmented at least as much as it has been at any other converting institution. A new General Education Curriculum will have been defined, course offerings will have been described, and major and minor programs of study will have been defined prior to the year of conversion. Advisers must be hired and new and continuing advisers must be educated to help students adapt to those changes and to survive the transition. Handbooks and web sites must be produced to provide a comprehensive body of information for advisers and students.

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4. Inevitably, details will be missed during the transition. The policy must be espoused and practiced so that students will not be harmed, in terms of monetary cost and time-to-degree, by the transition. Where minor deficiencies exist in a student’s degree requirements, advisory decisions should be made to avoid slowing progress of any student.

5. Because there is the potential for courses to be of greater intellectual depth and for the educational experience to be enhanced in many other ways with a longer term, transition to semesters must be accompanied by a thorough review of the goals and methods of each course, of each major, and of each curriculum.

6. Because there is the potential for an increased level of evaluation and communication between instructor and student, faculty must commit themselves to following through on the potential. Faculty also should re-evaluate the instructional techniques they use and consider introducing various learning opportunities to their courses.

7. Courses in sequence under quarters should not be a sequence broken in such a way that students can complete the sequence before transition, but cannot begin a sequence that would carry over to the first semester.

8. Where appropriate and reasonable, entire courses or particular sections of a course should be scheduled to suit the clientele. Departments and faculty must offer courses in a form and on a schedule that promotes intellectual development and expedites completion of a degree. The semester system should be built in such a way that the schedule is flexible enough to permit design of courses based on goals, methods, and content, yet on something as restrictive as 48 minutes/meeting H 3 meetings/week H 15 weeks/semester. A new student information system and associated registration/scheduling software must be flexible enough to accommodate this flexibility.

9. A summer term should fit into the public school summer so that P-12 teachers can take full advantage of our offerings.

10. A more precise and consistent system of defining "credit hour" should be devised and instituted so students would know better the amount of work any course is likely to demand. Such a system also would facilitate the designing and scheduling of courses that do not fit the traditional semester pattern.

11. The size of the faculty should be increased. Even in our current situation, the number of courses for honors and scholars is too low, classes are too large, too many courses are closed when at capacity, students are placed on waiting lists, and certain majors have limited enrollments and selective admissions for want of capacity. The Academic Plan calls for improvements in all these situations. This can be accomplished only by altering course content substantially, increasing the number of instructors, or by having the present faculty teach more. Most would agree that the first solution may no longer be desirable and the third solution is not practicable. A conversion to semesters would likely exacerbate the problems we face now if the number of instructors is not increased. Moreover, to accomplish the goals of the Academic Plan and to provide equivalent value to students for their educational dollar, no compromise in the quality of the faculty and the amount of time allotted to students should occur due to conversion. Therefore, it is important that the number of tenure-track faculty and graduate teaching assistants be increased to ensure that the ratio of regular faculty to auxiliary faculty and the ratio of faculty and GTAs to students per section are not compromised by conversion to semesters.
12. Graduate Assistants are students first and employees second. As stated in the Graduate School Handbook, their progress toward degree should be protected; therefore, the expectations that their employers might have and the actual time spent for teaching should not be increased by the conversion.
Ad Hoc Calendar Committee Notebooks
Volumes 1 and 2 are on file in the University Senate Office
Pedagogical implications of semester conversion

Summary
Dr. Alan Kalish

A search of the research-based literature on higher education finds virtually nothing on the pedagogical pros and cons of semesters versus quarters.

Almost every reference found was either a local report on how a university planned to convert or a "how-to" piece for students or faculty on negotiating the changeover. Much of this may be of use once a decision is taken, but provides little support for deciding whether or not to convert.

Gaines et al. of the Alabama College System claim that "collegiate research indicates that the semester system provides a superior environment for teaching and learning." Unfortunately, their report does not document this research, but only repeats the benefits usually claimed by proponents of change. While logical, we were unable to find publishable research findings to support these:

- More time to digest and retain course material;
- More opportunities for instructors to assess student progress;
- More opportunities to identify and correct difficulties;
- More flexibility in scheduling classes;
- Shorter length of class time;
- Textbooks written for semester;
- Fewer registration periods/forees and supplies;
- Reduced student files;
- Fewer published class schedules;
- Reduced cost of textbooks to students;
- Reduced financial aid process and
- Increased retention of students.

The UC Davis Task Force makes similar claims:

- The principal pedagogical advantages of the semester are that it:
  - provides more opportunity for thorough examination of a subject;
  - permits more meaningful term paper and research assignments;
  - allows time at the beginning to get into a subject and at the end to review course work before exams ("dead week");
  - permits students to choose research topics or term papers in a less hurried fashion;
  - allows students more time to pace their studies;
  - promotes greater interaction between faculty and students;
  - results in proportionately less time in administering exams;
  - reduces faculty time spent on such course preliminaries as reading lists, syllabi, etc.;
  - promotes better use of textbooks, which are now designed principally for the semester system;
  - reduces the tendency towards fragmentation of courses.

In seeking references, we connected several colleagues around the country who had recently experienced conversion in Georgia. Their caveats are attached here.

The one book that came close to discussing this issue is Duffy and Jones' 1995 Teaching Within the Rhythms of the Semester (Jossely-Bass). They spend part of the book discussing issues involved in designing courses that fit the shape of a semester. This could be of assistance to faculty in converting courses, but does not discuss the pros and cons of semesters vs. quarters.

In a 1991 report prepared for The Ohio State University Senate by Professor Richard Guntzler and others, several additional sources on the topic of university calendars are listed; however, as was noted in our review of more recent literature, almost all of it focuses on the administrative rather than pedagogical aspects of the issue. Of those few that mention pedagogic advantages or disadvantages, as the Guntzler report also points out, virtually none offer any research-based evidence for these claims.

However, for those who wish to consult the literature, several additional items might be of interest — see the Older References section of the References list.
Quotes regarding semester conversion

From Randall Bass (Valdosta State University)
One thing that complicated the shift was the insistence that programs be redesigned and that courses be rewritten rather than merely shifted from quarter to semester credit. In effect, it was a de facto across-the-board curriculum revision. So there was much waiting and gnashing of teeth throughout the process.

From Tricia Kaivisto (University of Georgia)
Things to be aware of under semesters:
1. Be aware that students are now taking 5 classes and you don’t them to have 5 mid-terms in one week, i.e. stagger assessment times.
2. Some class times will be longer. Don’t lecture the whole time. Break up the lecture with small group activities like think-pair-share.
3. If assigning a paper have mini-deadlines along the way.
4. Help students with planning their study time when the class does not meet every day.

From James Whitney (University of Georgia)
Here are several problems we have run into during the transition.
1. The semester teaching loads in many departments is four courses per year making it difficult for the field sciences to conduct field work in foreign countries. This is especially difficult in Anthropology, Geology, Ecology.
2. Two registrations per year lessen opportunities for student teaching in education and internships.
3. Study abroad is more expensive for a semester than for a quarter. We have partly offset this by creating a "Maymester" after our early spring semester which allows three to four week intensive off campus programs.
4. Our average student was taking 3 quarter courses meeting every day. There has been a problem with them taking 5 semester courses. This has resulted in a drop of credit hours which has financial consequences for the entire state system due to formula funding.
5. The average student taking 5 courses instead of 3 does not have more time to spend on self instruction such as research, writing, and reading assignments. The total time may be longer but they have 5 courses to prepare for.
6. A fifteen week semester is a long time and both students and faculty are experimenting with fall breaks to break up the time.
7. Due to the 5 course load, faculty tried to pack more into less time and it has not worked (10 weeks, 5 meetings a week is 50, where as 15 weeks times 3 meetings is 45, thus a 10% decrease in class meeting time).
8. Due to the lowered number of class meetings the administration at first tried to increase the number of courses taught by each faculty member, ignoring the fact that they simultaneously wanted faculty to give more writing and research assignments which take more time to grade. This was laid out in a long report by a state system committee examining work load but was ignored.
9. At a critical time in the process our central administration was changing and the coordinating team was disbanded, allowing each college to go on its own. We know have some departments teaching labs and computer sessions onTu and Th on a M-W-F class schedule, which makes scheduling a nightmare for students.
10. With hindsight, having taken all of my BS and MS work on semesters my Ph.D. on semesters, and teaching on both, I would stay with the quarter system but work on a system where courses do not meet every day, students take approximately 4 small courses at a time, and allow more time for writing and research. Professionally, I do not like the system we are now in. I would prefer a Princeton or Berkeley system where students take 4 courses at a time for slightly increased credit than the traditional 5 courses at a time semester system.

In short, if we had to do it over again, as a faculty member I would “just say NO!”

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Faculty & TA Development, 2011
References regarding semester conversion

Books

Part Two: Tempo of the Semester discusses issues involved in designing courses that fit the shape of a semester. This could be of assistance to faculty in converting courses, but does not discuss the pros and cons of semesters vs. quarters.

Reports available through ERIC
ED247818
Corporate Name: Tennessee Univ., Knoxville. [XIE86100]
Title: Report to the Chancellor Submitted by UTK Semester Feasibility Study Committee.
Date: 19840531
Pagination Count: 75

Results of an assessment of the efficacy of changing from a quarter to a semester calendar at the University of Tennessee, Knoxville, are presented. The study committee investigated the changes required for a calendar conversion, and identified the most serious problems and probable transitional costs. Site visits were made to three other campuses that had converted their calendars. Principles for the change include the following: students should not be harmed by the transition process, adequate time should be allowed for the transition, and other changes should be kept to a minimum during the transition period. Guidelines for semester conversion are provided with attention to areas such as course credits; the fall, spring, and summer calendars; adjustments to the advising system; and special programs. In addition, guidelines for the transition process cover procedures for student appeal, information dissemination, and use of existing structures for curriculum revision. Information on the coordination of the transition process is also included. Appendix materials include committee reports on: teacher loads, student affairs, the impact of calendar change on chronic student problems, financial impacts, curriculum change and evaluation, and cooperative education. Semester calendars and exam schedules for 1987-88 through 1990-1991 are included.

ED299929
Author: Coleman, Daniel; And Others
Title: Academic Calendar Change Impact on Enrollement Patterns and Instructional Outcomes.
Journal Name: Research in Higher Education, v20 n2 p135-66 1984
A study of 10 universities in two states examined the impact of a change from the quarter to the semester calendar system. A decrease in average student credit hour load and an increase in the percentage of students withdrawing from courses were observed.

ED430644
Author: Gainous, Fred; Kuzmic, Jorge; Romine, Robert J.; Culverhouse, Reese; Dahl, Debbie
Corporate Name: Alabama State Dept. of Postsecondary Education, Montgomery.

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Title: The Alabama College System Quarter to Semester Conversion: A Working Manual.
Date: 19971100
Pagination Count: 184

In February 1997, the Alabama State Board of Education authorized the Alabama College System to convert to a semester based academic calendar, effective for the 1998-99 academic year. The decision to move forward with the semester conversion was guided by the fact that collegiate research indicates that the semester system provides a superior environment for teaching and learning. This manual was designed to serve as a reference guide to the semester conversion, by providing information and examples that explain how the conversion will affect institutions, and to assist in the transition process on individual campuses. The manual identifies challenges and opportunities with regard to the following areas: (1) instruction, including class schedules, teaching loads, and instructional programs and awards; (2) fiscal impacts for students, employees, and college operations; (3) student services, including the role of academic advisors and the impact on students; and (4) information services, including forms, files, personnel, and historical data. The report also contains surveys to be completed by students, faculty, staff, and administrators requesting their opinions about the conversion from a quarter system to a semester system. The report concludes with recommended policy revisions.

Web Sites
http://www.auburn.edu/semesters
This site includes a “Faculty Guide,” which gives lots of details about the conversion at Auburn University. The reasons given for changing are that the majority of Universities in the US are on that calendar and it “provides the rare opportunity to assess all academic programs and course offerings and to formulate curricula appropriate to educate our students in the 21st century.”
“Principles for Conversion to Semester Calendar” lists who will do want in order to make the conversion, and is available at http://www.auburn.edu/semesters/guideprin.html “Academic Standards: Assignment of Credit Hours” discusses courses need to be redesigned and semester hours calculated to assure an appropriate student and faculty workload. It is available at http://www.auburn.edu/semesters/stdhrs.html
http://admissions.uscaval.edu/semester/GUIDINGPRIN.HTML
This site describes the conversion at USA, but is aimed primarily at students.
http://enroll.colstate.edu/semconv/PAGE27.HTM
This site, also for students, provides the Semester Core Curriculum for Colorado State.
This link provides the Semester Conversion Task Force report from UC Davis from 1997. It does include a brief section listing the pedagogical advantages of both semesters and quarters, finding that semesters offer more such advantages.

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Faculty & TA Development, 2001
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<th>Institution</th>
<th>Web site</th>
<th>Year Converted</th>
<th>Notes</th>
</tr>
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<tbody>
<tr>
<td>University of Minnesota</td>
<td><a href="http://www.iris.umn.edu/convert/">http://www.iris.umn.edu/convert/</a></td>
<td>AU99</td>
<td>Comprehensive plus; stub &amp; advisor handbooks; newsletters track process</td>
</tr>
<tr>
<td>University of Georgia</td>
<td><a href="http://www.usg.edu/aps/programs/convert.html">http://www.usg.edu/aps/programs/convert.html</a></td>
<td>AU98</td>
<td>Basic guiding principles; committees</td>
</tr>
<tr>
<td></td>
<td><a href="http://gcsis.usg.edu/gcsis/gcsis.html">http://gcsis.usg.edu/gcsis/gcsis.html</a></td>
<td></td>
<td>Course Info</td>
</tr>
<tr>
<td>University of Utah</td>
<td><a href="http://www.utah.edu/it-LAST/convert.htm">http://www.utah.edu/it-LAST/convert.htm</a></td>
<td>AU98</td>
<td>Limited info available – rationale, equivalency tables</td>
</tr>
<tr>
<td>Youngstown State University</td>
<td><a href="http://cyc.you.edu/24/">http://cyc.you.edu/24/</a></td>
<td>AU99</td>
<td>Comprehensive; advisor handbook, college advising plan</td>
</tr>
<tr>
<td>Ohio University</td>
<td><a href="http://www.syc%D0%B2%D0%BE%D0%BB%D1%8C%D1%81.ohio.edu/convert/">http://www.sycвольс.ohio.edu/convert/</a></td>
<td></td>
<td>Literature review; peer institution survey; internal survey</td>
</tr>
<tr>
<td>Wright State University</td>
<td><a href="http://www.wright.edu/~ugm/sac/courses.htm">http://www.wright.edu/~ugm/sac/courses.htm</a></td>
<td>AU99</td>
<td>Did not convert; studied 96-97</td>
</tr>
<tr>
<td>Georgia Tech</td>
<td><a href="http://www.ugsc.gatech.edu/conserv.html">http://www.ugsc.gatech.edu/conserv.html</a></td>
<td>AU99</td>
<td>97 Report “Recent Experiences of Institutions and Systems”</td>
</tr>
<tr>
<td>Auburn University</td>
<td><a href="http://www.auburn.edu/convert/">http://www.auburn.edu/convert/</a></td>
<td>AU98</td>
<td>Comprehensive plus, everything from a Faculty Guide to the actual forms used in course conversion</td>
</tr>
<tr>
<td>University of Southern Alabama</td>
<td><a href="http://admissions.southern.edu/student/convert/">http://admissions.southern.edu/student/convert/</a></td>
<td>AU98</td>
<td>Comprehensive; Guiding principles, committee lists, brief timeline</td>
</tr>
<tr>
<td>Kent State University</td>
<td><a href="http://www.kent.edu/admissions/convert.html">http://www.kent.edu/admissions/convert.html</a></td>
<td>AU98</td>
<td>Core and Major requirements; offers a “Survival Guide for Nervous CS Majors” that seems useful for faculty designing a curriculum as well</td>
</tr>
<tr>
<td>Armstrong Atlantic University</td>
<td><a href="http://www.armstrong.gatech.edu/convert.html">http://www.armstrong.gatech.edu/convert.html</a></td>
<td>AU98</td>
<td>Another good student guide; links benefits of seminars</td>
</tr>
<tr>
<td>Dalton College</td>
<td><a href="http://www.daltonstate.edu/convert.html">http://www.daltonstate.edu/convert.html</a></td>
<td>AU98</td>
<td>Answers to LOTS of frequently asked questions</td>
</tr>
<tr>
<td>University of West Alabama</td>
<td><a href="http://www.universityofwestalabama.edu/convert/">http://www.universityofwestalabama.edu/convert/</a></td>
<td>AU99</td>
<td>Student information; course conversion</td>
</tr>
<tr>
<td>Winona State University</td>
<td><a href="http://www.winona.msu.edu/convert/">http://www.winona.msu.edu/convert/</a></td>
<td>AU98</td>
<td>Dept specific info about transition</td>
</tr>
<tr>
<td>University of Georgia</td>
<td><a href="http://www.usg.edu/convert/">http://www.usg.edu/convert/</a></td>
<td>AU98</td>
<td>No penalties promise; semester hrs conversion calculator</td>
</tr>
<tr>
<td>University of Rio Grande and Rio Grande Community College</td>
<td><a href="http://www.ugarc.org/convert.html">http://www.ugarc.org/convert.html</a></td>
<td>AU98</td>
<td>Semester conversion committee meeting minutes; timetable; step-by-step guide for faculty converting courses</td>
</tr>
<tr>
<td>Cleveland State University</td>
<td><a href="http://www.csuohio.edu/convert/">http://www.csuohio.edu/convert/</a></td>
<td>AU98</td>
<td>Course, student and advisor information; History professor’s essay “Semester Conversion: How I Spent My Summer Vacation”</td>
</tr>
<tr>
<td>Hobart &amp; William Smith Colleges</td>
<td><a href="http://www.hbs.edu/convert/">http://www.hbs.edu/convert/</a></td>
<td>AU98</td>
<td>Trimester to semester. Course and student info</td>
</tr>
<tr>
<td>Dixie College</td>
<td><a href="http://www.dixie.edu/convert/">http://www.dixie.edu/convert/</a></td>
<td>AU98</td>
<td>Report and recommendations of Utah System of Higher Ed Semester Conversion Task Force; short reports from faculties; Gen Ed reports</td>
</tr>
<tr>
<td>University of California Davis</td>
<td><a href="http://www.ucdavis.edu/convert.html">http://www.ucdavis.edu/convert.html</a></td>
<td>AU98</td>
<td>Decision not to convert; New articles onstanse debate; 93 Semester Conversion Task Force Report; reports on Berkeley and UCLA</td>
</tr>
<tr>
<td>Andrews University</td>
<td><a href="http://www.andrews.edu/convert/">http://www.andrews.edu/convert/</a></td>
<td>AU98</td>
<td>Steering committee site (minutes, etc) Good ideas for communicating, but site apparently not maintained</td>
</tr>
<tr>
<td>Lakeland Community College</td>
<td><a href="http://www.lakeland.cc.fl.us/convert/index.html">http://www.lakeland.cc.fl.us/convert/index.html</a></td>
<td>AU98</td>
<td>Student focus</td>
</tr>
<tr>
<td>Cuyahoga Community College</td>
<td><a href="http://www.ohio-c.cuyahoga.edu/convert/index.html">http://www.ohio-c.cuyahoga.edu/convert/index.html</a></td>
<td>AU98</td>
<td>Frequently asked questions</td>
</tr>
</tbody>
</table>

*Paper copies housed in OSL Bricker Hall*

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Appendix C
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<thead>
<tr>
<th>Institution</th>
<th>Paper</th>
<th>Year Converted</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Ohio State University</td>
<td>Multiple documents</td>
<td>1992</td>
<td>Feasibility Study, comparison of calendar and general ed requirements to benchmark institutions</td>
</tr>
<tr>
<td>Michigan State University</td>
<td>Multiple documents</td>
<td></td>
<td>Report of the Semester Study Group, guidelines, advisor headbook</td>
</tr>
<tr>
<td>Alabama College System</td>
<td>The Alabama College System Quarter to Semester Conversion: A Working Manual</td>
<td>AU98</td>
<td>Designed to serve as a reference guide to semester conversion. Concludes with recommended policy revisions</td>
</tr>
<tr>
<td>Chabot College</td>
<td>Student Outcomes Report: The Latest Numbers and Recent Trends in Student Success, Withdrawal, Persistence, Degrees/Certificates, and Transfer, Fall 1996</td>
<td>AU94</td>
<td>Looks at student success, withdrawal, persistence, degrees/certificates and transfers for several years before and after conversion</td>
</tr>
<tr>
<td>Gainesville College</td>
<td>Space Utilization Analysis</td>
<td>Very small school, so limited usefulness</td>
<td></td>
</tr>
<tr>
<td>Auburn University</td>
<td>Transition to Semesters: Effects on Enrollment &amp; PTE Students</td>
<td>AU00</td>
<td>Comparison of enrollment and PTE prior to and following transition to semesters</td>
</tr>
<tr>
<td>Virginia Community College System</td>
<td>The Effect of Converting from Quarters to Semesters on Enrollment &amp; Retention in the VCCS</td>
<td>AU88</td>
<td></td>
</tr>
<tr>
<td>Central Missouri State University</td>
<td>Comparison of the Student Credit Hours Generated, Average Course Loads, Grades Earned, and Withdrawals from Courses Accompanying the Change from the Term to the Semester Academic Calendar at CMSU</td>
<td>AU84</td>
<td></td>
</tr>
<tr>
<td>Illinois Board of Higher Education</td>
<td>Analysis of Academic Calendars of Illinois Colleges And Universities</td>
<td></td>
<td>Discusses qualitative and productivity improvements that can be realized by shaping the calendar to meet the needs of faculty, staff, and students and better use facilities and other resources</td>
</tr>
</tbody>
</table>

*Paper copies housed in 08L Bricker Hall

RMSIA: Strategic Analysis Group, ICH
Semester Conversion: Exploring the Issues
A Day of Discussions at The Ohio State University
Tuesday, April 3, 2001

9:30 – 11:00  Informal Panel Discussion with Question and Answer Period
The Ohio State University
Members of the Ad Hoc University Calendar Committee:
- Ann Kallish, Faculty & TA Development
- University of Minnesota
- Ann Waltner, Professor of History and former Associate Dean of the College of Liberal Arts; chair of the Curricular Conversion Committee
- Kate Maple, Director of Student Services, College of Human Ecology
- University of Georgia
- Bill Barstow, Professor of Botany and member of Conversion Committee
- Cleveland State University
- Everett Cataldo, Professor of Political Science and chair of semester conversion committee
- Michigan State University
- Linda Stanford, Registrar and Assistant to the Provost for Curriculum and Catalog; Professor, Modern Art & Architecture

Grand Lounge
Faculty Club

11:00 – 12:30  In-depth Discussion - Student & Curricular Issues
Kate Maple, Linda Stanford

Campbell 271

11:00 – 12:00  In-depth Discussion – Faculty Teaching & Research Issues
Ann Waltner, Bill Barstow, Everett Cataldo

Campbell 335

12:00 – 1:30  Lunch – Ohio State faculty, students, and staff are invited to purchase lunch and join members of the Ad Hoc University Calendar Committee and guest panelists for further discussion.

Faculty Club
West Dining Room
Junior Colleagues

1:30 – 2:30  Repeat In-depth Discussion – Student & Curricular Issues
Kate Maple, Ann Waltner

Mendenhall 115

1:30 – 2:30  Repeat In-depth Discussion – Faculty Teaching & Research Issues
Bill Barstow, Everett Cataldo, Linda Stanford

Mendenhall 131

3:00 – 4:45  Repeat Panel Discussion

Grand Lounge
Faculty Club

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<table>
<thead>
<tr>
<th>AAUP Advisory Board</th>
<th>Gayla Chimes</th>
<th>12 faculty</th>
<th>Pedagogical plan for faculty input regarding the decision to change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Advisors</td>
<td>Peggy Siew, Jan-Morgan, John Carpentier-Hahn</td>
<td>25 students</td>
<td>Lack of communication, seminars, student feedback for improvement, input needed</td>
</tr>
<tr>
<td>AIT</td>
<td>Julia Carpentier-Hahn, Gayla Chimes, Steve Fink, Don Haurin, Joe Bar</td>
<td>Committee Comm. about 12</td>
<td>Hard to avoid scheduling conflicts &amp; make up time on seminars, seminars better for improved input, only attended</td>
</tr>
<tr>
<td>MO</td>
<td>Joe Bar, Dave Stetsen</td>
<td>2 classes, 1 class, 2 hrs</td>
<td>Convincing offers opportunities to improve curriculums, new faculty input</td>
</tr>
<tr>
<td>MSU</td>
<td>Julie Carpentier-Hahn, Don Haurin</td>
<td>20-24 faculty</td>
<td>Convincing offers opportunities to improve curriculums, new faculty input</td>
</tr>
<tr>
<td>EGR</td>
<td>Jan Haur, David Latham, Dave Stetsan</td>
<td>30+</td>
<td>Convincing offers opportunities to improve curriculums, new faculty input</td>
</tr>
<tr>
<td>EN</td>
<td>Julie Carpentier-Hahn, Gayla Chimes, Steve Fink, John Carpentier-Hahn</td>
<td>35 faculty</td>
<td>Convincing offers opportunities to improve curriculums, new faculty input</td>
</tr>
<tr>
<td>DEN</td>
<td>Gayla Chimes</td>
<td>20 members of the Executive Committee</td>
<td>Convincing offers opportunities to improve curriculums, new faculty input</td>
</tr>
<tr>
<td>AES</td>
<td>Gayla Chimes, Peggy Siew, John Carpentier-Hahn</td>
<td>20 faculty, including 20 students by remote link</td>
<td>Small classes, impact on AES 15, 20 topics, difficult for AES</td>
</tr>
<tr>
<td>HAB</td>
<td>Dave Stetsan</td>
<td>10 students</td>
<td>Impact on AES 15, 20 topics, difficult for AES</td>
</tr>
<tr>
<td>HAB</td>
<td>Gayla Chimes, Steve Fink, John Carpentier-Hahn</td>
<td>20 students</td>
<td>Impact on AES 15, 20 topics, difficult for AES</td>
</tr>
<tr>
<td>NLM</td>
<td>Gayla Chimes, Steve Fink, John Carpentier-Hahn</td>
<td>20 students</td>
<td>Impact on AES 15, 20 topics, difficult for AES</td>
</tr>
</tbody>
</table>

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| Campus        | Name            | Role                          | Concerns about students enrolled during conversion, reduction in choice of when to take classes, being stuck in class for a longer period of time; transitioning to OSU might be easier if OSU were on semesters | Concerns about students enrolled during conversion, reduction in choice of when to take classes, being stuck in class for a longer period of time; transitioning to OSU might be easier if OSU were on semesters | Concerns about students enrolled during conversion, reduction in choice of when to take classes, being stuck in class for a longer period of time; transitioning to OSU might be easier if OSU were on semesters | Concerns about students enrolled during conversion, reduction in choice of when to take classes, being stuck in class for a longer period of time; transitioning to OSU might be easier if OSU were on semesters | Concerns about students enrolled during conversion, reduction in choice of when to take classes, being stuck in class for a longer period of time; transitioning to OSU might be easier if OSU were on semesters |
|--------------|-----------------|-------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Marion       | Brian McEneany  | about 12 Marion campus students, 4 Marion campus staff | Would more classes mean more homework? Would the hourly requirements/status of HW - and part-time students change? Would the course of completing homework change? | Would more classes mean more homework? Would the hourly requirements/status of HW - and part-time students change? Would the course of completing homework change? | Would more classes mean more homework? Would the hourly requirements/status of HW - and part-time students change? Would the course of completing homework change? | Would more classes mean more homework? Would the hourly requirements/status of HW - and part-time students change? Would the course of completing homework change? | Would more classes mean more homework? Would the hourly requirements/status of HW - and part-time students change? Would the course of completing homework change? |
| USG          |                 |                               |                                                                                                                                         |                                                                                                                                         |                                                                                                                                         |                                                                                                                                         |                                                                                                                                         |                                                                                                                                         |
| MPS          | crude Clamer,     | Exec Comm., about 20          | ETA big load, impact of HIB; effect on summer; non-lead & part-time staffing; transition for stills | ETA big load, impact of HIB; effect on summer; non-lead & part-time staffing; transition for stills | ETA big load, impact of HIB; effect on summer; non-lead & part-time staffing; transition for stills | ETA big load, impact of HIB; effect on summer; non-lead & part-time staffing; transition for stills | ETA big load, impact of HIB; effect on summer; non-lead & part-time staffing; transition for stills |
| NUR          | Joe Barr         | B fac, Assoc Dean             | Need definition of when pay starts, stops | Need definition of when pay starts, stops | Need definition of when pay starts, stops | Need definition of when pay starts, stops | Need definition of when pay starts, stops |
| OPY          | Joe Barr, Head Myra | 15-20                          | Workload; space; opportunity to force curricular revision; potential to compromise quality | Workload; space; opportunity to force curricular revision; potential to compromise quality | Workload; space; opportunity to force curricular revision; potential to compromise quality | Workload; space; opportunity to force curricular revision; potential to compromise quality | Workload; space; opportunity to force curricular revision; potential to compromise quality |
| Regional     | Brian McEneany,  | about 15                        | How would a possible increase in avg class size affect regionals? | How would a possible increase in avg class size affect regionals? | How would a possible increase in avg class size affect regionals? | How would a possible increase in avg class size affect regionals? | How would a possible increase in avg class size affect regionals? |
| campuses     | Dave Stasiessen |                               | Faculty workload | Faculty workload | Faculty workload | Faculty workload | Faculty workload |
| SIS          | Dan Isevin, Martha Garlend, Sharon West | 40-50 faculty                   | Flexibility in course scheduling; nontraditional students; flexibility for MA skills in professional program | Flexibility in course scheduling; nontraditional students; flexibility for MA skills in professional program | Flexibility in course scheduling; nontraditional students; flexibility for MA skills in professional program | Flexibility in course scheduling; nontraditional students; flexibility for MA skills in professional program | Flexibility in course scheduling; nontraditional students; flexibility for MA skills in professional program |
| Undergrad    | Crude Clamer,   | about 25                        | Course variety, flexibility; transition; transition costs; need to address such issues as closed courses on other calendar | Course variety, flexibility; transition; transition costs; need to address such issues as closed courses on other calendar | Course variety, flexibility; transition; transition costs; need to address such issues as closed courses on other calendar | Course variety, flexibility; transition; transition costs; need to address such issues as closed courses on other calendar | Course variety, flexibility; transition; transition costs; need to address such issues as closed courses on other calendar |
| Town Meeting | Martha Garlend,   |                               | Where will the money come from? | Where will the money come from? | Where will the money come from? | Where will the money come from? | Where will the money come from? |
| USAG         | Sharon West, Poppy Stone | about 26                        | More staff issues considered? | More staff issues considered? | More staff issues considered? | More staff issues considered? | More staff issues considered? |
Teaching and Research Assignments Survey of College Deans

Survey Distribution
The Faculty Issues Subcommittee developed three surveys to poll college deans and school directors regarding the teaching and research assignments for faculty and graduate assistants within their units. One survey was sent to 108 deans and directors at Ohio State and eight of Ohio State’s benchmark universities: University of Arizona, UCLA, University of Illinois at Urbana-Champaign, University of Michigan, Pennsylvania State University, University of Texas, University of Washington, and University of Wisconsin-Madison. The intent of this survey was to collect information on the expected and average teaching loads for faculty and graduate students and on the number of credit hours for which classes were offered. A second, longer survey was sent to 47 deans and directors at the University of Georgia, Georgia Institute of Technology, the University of Minnesota, and Cleveland State University, institutions that had recently converted to the semester calendar. In addition to the questions asked on the first survey, the second survey asked a number of questions about the effect of conversion on faculty time, number of instructors needed, classroom use, and on faculty and graduate student recruitment and retention. A third survey, one more appropriate for regional campus deans, was later developed on the advice of Dean John Riedl of OSU’s Marion campus; this survey was distributed to 14 deans or directors of regional campuses of Bowling Green State University, Kent State University, Miami University, the University of South Carolina, and several of Penn State’s regional campuses.

Response Rate
36 of the 108 college deans or school directors (33%) responded to the short survey of OSU and benchmarks. Of these, 23 were from semester universities and 13 were from quarter universities. Of the 13 responses from quarter universities, 9 were from OSU deans. 12 of the 47 college deans or school directors (26%) responded to the long survey of institutions that had converted. 4 of the 14 regional campus deans or directors (29%) responded to the regional campus survey.

Response Summary
Due both to the complexity of the issues under study and the haste with which the survey was constructed, responses were less clear than we might have wished. Complexity makes it difficult to say anything definitive about teaching loads, for they are measured very differently not only from university to university, but also from one department to another within a single university. Survey design flaws are no doubt responsible for the remarkably unenlightening responses to the question, “What is the teaching load per term for graduate assistants in your college or school with: a) Full responsibility for instruction of a section; b) Responsibility for leading recitation/discussion; and c) Responsibility for assisting with laboratory sections?” Here, responses were structured in

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a variety of ways. Many responses gave us either the number of credit hours or course sections TAs are required to teach per term, as we had intended. However, others filled in percentages or simply marked an X by the choices that pertained. Where possible, survey answers are summarized below.

Survey of Benchmark Institutions

Most of the semester respondents (16 of 23) defined their expected teaching load as either four courses or twelve credit hours. Two replied that the expected load varied, one replied that the expected load was three courses, three listed the expected load as higher or having a range that went higher than four, and one did not respond.

Nine respondents gave numbers for the average course load that were lower than for the expected teaching load. Six noted no difference, two gave higher numbers, one said the average load varied, and four did not respond. In addition, one respondent who had defined the expected load as variable said that the average load was two.

Semester school respondents described their course offering by credit hour as follows:

5 or more credit hours: 11 said none, 11 said few, and 1 said half
4 credit hours: 4 said none, 16 said few, 1 said half, 1 said most and 1 said most graduate
3 credit hours: 3 said few, 3 said half, 14 said most, 1 said most undergraduate and 2 said all
2 credit hours: 4 said none, 18 said few, and 1 said half
1 credit hour: 5 said none, 18 said few

Quarter school respondents (most from OSU) described their course offering by credit hour as follows:

5 or more credit hours: 1 said none, 4 said few, 1 said one-third, 3 said half, 2 said most and 1 said all
4 credit hours: 4 said none, 16 said few, 1 said half, 1 said most and 1 said most graduate
3 credit hours: 3 said few, 3 said half, 14 said most, 1 said most undergraduate and 2 said all
2 credit hours: 4 said none, 18 said few, and 1 said half
1 credit hour: 5 said none, 18 said few

As mentioned above, responses to our questions about graduate teaching assistant teaching loads were unclear and not useful.

Survey of Institutions that Converted

All but one of the respondents said that faculty teaching loads are variable. Six respondents said that the percent of faculty with variable teaching loads stayed the same.

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following conversion, three reported an increase, and one reported a decrease. Nine reported that the variance had stayed the same, one reported an increase, and one reported a decrease.

Faculty time spent on student advising was said to have stayed the same by eight respondents, to have increased by two, and to have decreased by one. One did not know whether there had been a change. One of those who noted an increase commented that the increase came about because faculty and students have more time to work together under the new calendar.

The availability of release time was said to have stayed the same by eight respondents, and to have increased by two. Two did not respond. Comments about faculty perception of the effect of conversion on research time ranged from positive to negative; seven thought that faculty found there to be no or little change, two thought faculty found the impact to be negative, and three thought faculty found the impact to be positive, though one noted that other policies implemented concomitantly were responsible for the improved situation.

Respondents found that conversion had no effect on their ability to recruit or retain faculty or graduate students.

Six respondents said that they needed no additional tenure-track faculty following conversion, three said that they needed some more and another two said that they needed more but that the need arose from factors other than semester conversion. One did not respond. Six (but not the same six) said that they needed no additional graduate teaching assistants following conversion, one said that significantly more were needed, two said that they needed some more, and another two said that they needed some more but that the need arose from factors other than semester conversion. One did not respond. Seven respondents said that they needed no additional other part-time instructors, two said that they needed some more, one said that some more were needed but that the need arose from factors other than semester conversion. Two did not respond.

Most courses are offered for three or four credit hours. Since conversion, seven respondents said that average section size had increased, three said it stayed the same, one said it decreased, and one did not respond to the question. Six respondents said that the percentage of large lecture classes had increased following conversion, four said that it stayed the same, and two said that it decreased.

With regard to space needs following conversion, seven respondents said that they needed some or significantly more lecture hall space and five said they needed no more. Five said they needed some or significantly more laboratory space, six said they needed no more, and one did not respond to the question. Six said they needed some more seminar space and six said they needed no more.
Survey of Regional Campus Deans and Directors

Only two responses were received from deans or directors of regional campuses not associated with Ohio State. Both deans replied that most of their courses are taught for three credit hours and that course loads are not variable. One replied that faculty are expected to teach 24 credit hours per year. The other noted that faculty loads are not calculated either by number of courses or by number of credit hours, and specified that faculty are expected to teach 24 contact hours per year.

The two responses from Ohio State regional campus deans both noted that most courses are taught for five credit hours. For both campuses, teaching load is calculated in terms of number of courses. At the Newark campus, faculty across most disciplines are expected to teach six courses per year. At the Mansfield campus, faculty in the physical sciences and in writing are expected to teach six courses per year; most other faculty have a teaching load of seven courses.
Federal Grants & Contracts Trends (in millions)

Data Source: National Center for Education Statistics Integrated Post-secondary Education Data System

RMSIA: Strategic Analysis Group, JCH 73
Journal Publication Trends

Data Source: Institute for Scientific Information

RMSIA: Strategic Analysis Group, HYZ
### Percent of Full Time Salary Paid to Faculty on Professional Leave at Four-Year Universities in Ohio

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<thead>
<tr>
<th>University</th>
<th>1 semester leave</th>
<th>2 semester leave</th>
<th>1 quarter leave</th>
<th>2 quarter leave</th>
<th>3/4 quarter leave</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bowling Green State University</td>
<td>100%</td>
<td>50%</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Case Western Reserve</td>
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<tr>
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<td>66.6%</td>
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<tr>
<td>College of Mount St. Joseph</td>
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<tr>
<td>Franciscan University</td>
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<td>100%</td>
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<tr>
<td>Mount Vernon Nazarene</td>
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<tr>
<td>The Ohio State University</td>
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<tr>
<td>University of Cincinnati*</td>
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<td>66.6%</td>
<td>130%</td>
<td>100%</td>
<td>66.6%</td>
<td></td>
</tr>
</tbody>
</table>

*Supplemental Quarters are also available as follows: Each year the University shall make available to Bargaining Unit Faculty eighteen supplemental quarters of Professional Development Leave (PDL) to be awarded on a competitive basis by a subcommittee composed of all Bargaining Unit Faculty Members serving on the University Promotion and Tenure Committee. One or two such quarters at full salary may be awarded by that Committee to any Bargaining Unit Faculty Member who has received a Professional Development Leave. If awarded a PDL plus one supplemental quarter, a Member's total leave shall consist of two quarters leave at 100% of the salary the Member would have earned during those two quarters, or three quarters leave at 89% of the salary the Member would have earned during those three quarters. If awarded a PDL plus two supplemental quarters, a Member's total leave shall consist of three quarters leave at 100% of the salary the Member would have earned during those three quarters.

Wright State University

|                                | 100% | 63% | 67% earned during those three quarters |

Faculty receive 100% pay for a full-year sabbatical. The sabbatical application process is very rigorous. It is a competitive process in which proposals are screened by a committee and recommended to the provost who makes the final decision. They may recommend up to 16 full-year sabbaticals and 3 one semester leaves or an equivalent combination per year. Upon return from the sabbatical the individual documents in a written report that he/she has met the goals stated in the proposal and also must give a public presentation related to the sabbatical activity.

Youngstown State University

|                                | 100% | 100% |

*Medicine & Law are on semesters; all other colleges are on quarters

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Appendix I

Data Source: Summary of Responses to E-mail Inquiry to Ohio Association for Institutional Research List-seerv

RMSIA: Strategic Analysis Group, JCH

75
Four Year Graduation Rates at Midwestern Universities
By Cohort Entrance Year

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>A</td>
<td>30%</td>
<td>37%</td>
<td>34%</td>
<td>32%</td>
<td>34%</td>
<td>35%</td>
<td>38%</td>
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<td>41%</td>
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<td>21%</td>
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<td>20%</td>
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<tr>
<td>B</td>
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Six Year Graduation Rates at Midwestern Universities
By Cohort Entrance Year

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<td>74%</td>
<td>74%</td>
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Note: 1989 is the baseline year for 4-yr graduation and 1987 is the baseline year for 6-yr graduation; cohorts entering Michigan State University after the baseline year and graduating within 4 or 6 years would have been enrolled during or following semester conversion.

RMSIA: Strategic Analysis Group, JCH
<table>
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<th>AY 97-98</th>
<th>AY 98-99</th>
<th>AY 99-00</th>
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<tr>
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<tr>
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<td>% Faculty who are Full-time</td>
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<th>AY 98-99</th>
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<td>0%</td>
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<th>AY 98-99</th>
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<td>31%</td>
<td>35%</td>
<td>37%</td>
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<tr>
<td>% Classes Over 50</td>
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<td>13%</td>
<td>14%</td>
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<tr>
<td>% Faculty who are Full-time</td>
<td>97%</td>
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<td>% Classes Over 50</td>
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<tr>
<td>% Faculty who are Full-time</td>
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<th>AY 97-98</th>
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<td>48%</td>
<td>52%</td>
<td>58%</td>
<td>42%</td>
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<tr>
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<td>15%</td>
</tr>
<tr>
<td>% Faculty who are Full-time</td>
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<td>98%</td>
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RMSIA: Strategic Analysis Group, JCH 78
Data Source: National Center for Education Statistics, Integrated Postsecondary Education Data System

RMSIA: Strategic Analysis Group, JCH 79
SAMPLE SEMESTER TIMELINE

Fall Semester
- 8/28: First Day of Classes
- 8/29: First Day of Classes
- 9/4: Labor Day
- 9/11: Labor Day
- 9/18: Labor Day
- 9/25: Labor Day
- 10/2: Labor Day
- 10/9: Labor Day
- 10/16: Labor Day
- 10/23: Labor Day
- 10/30: Labor Day
- 11/6: Labor Day
- 11/13: Labor Day
- 11/20: Labor Day
- 11/27: Labor Day
- 12/4: Labor Day
- 12/11: Labor Day

Fall Semester = 15 weeks of instruction (14 Mondays and Fridays; 15 Tuesdays, Wednesdays, & Thursdays) plus one week of exams

Spring Semester
- 1/22: First Day of Classes
- 1/29: First Day of Classes
- 2/5: First Day of Classes
- 2/12: First Day of Classes
- 2/19: First Day of Classes
- 2/26: First Day of Classes
- 3/5: First Day of Classes
- 3/12: First Day of Classes
- 3/19: First Day of Classes
- 3/26: First Day of Classes
- 4/2: First Day of Classes
- 4/9: First Day of Classes
- 4/16: First Day of Classes
- 4/23: First Day of Classes
- 4/30: First Day of Classes
- 5/7: First Day of Classes

Spring Semester = 15 weeks of instruction (14 Mondays, Tuesdays, Wednesdays, Thursdays & Fridays) plus one week of exams

Minister
- 5/16: First Day of Classes
- 5/23: First Day of Classes
- 5/30: First Day of Classes

Miniester = 15 days including instruction & exams

Summer Term
- 6/8: Independence Day
- 6/11: Independence Day
- 7/4: Independence Day
- 7/11: Independence Day
- 7/18: Independence Day
- 7/25: Independence Day
- 7/2: Independence Day
- 7/9: Independence Day
- 7/16: Independence Day
- 7/23: Independence Day
- 7/30: Independence Day

Summer Term = 8 weeks including Instruction and exams (8 Mondays, Tuesdays, Thursdays, & Fridays; 7 Wednesdays)
Semester Conversion in the College of Liberal Arts
Suggested Next Steps

A Working Paper for Discussion and Decision
Submitted to the College of Liberal Arts
Curriculum, Instruction and Advising Committee
Budget Advisory Committee
Assembly
Academic Units

September 21, 2000

Prepared by:
Steven J. Rosenstone, Dean
Barbara Reid, Associate Dean for Planning
Ann Weinzer, Recent Associate Dean for Academic Programs
Suzanne Bartouche, Chief Financial Officer
Ole Gram, Assistant to the Associate Dean for Academic Programs
Peter Radcliffe, Analyst
Erin Sperling, Instructional Resources Coordinator
Introduction

In most respects, semester conversion in the College of Liberal Arts was a huge success. The faculty used the occasion to create innovative new courses, revist and enrich the curriculum, introduce new degree programs, and enhance the contexts that they converted to the 15-week format of semesters. Academic advisers worked closely with students to facilitate their smooth transition to the new semester system. The years of thoughtful planning and hard work by the college's faculty, academic advisers, and staff ensured a transition to semesters that served our students well.

At the same time that the college and University of Minnesota moved from quarters to semesters, the University implemented new student systems via PeopleSoft, began major renovations of several buildings that took over classrooms offline, permitted the student body to increase in size, implemented writing across the curriculum, freshman seminars, new inter-disciplinary minors, and much more. It was a challenging year in which the faculty, academic advisers, and staff throughout the University did an extraordinary job of adjusting to the new calendar, new curriculum, and new systems.

As with any large institutional change, semester conversion is a work in progress – an evolutionary process. With one full year of experience behind us, it is time to assess how things are going. What were the expected and unexpected consequences of the new curriculum? What were the unanticipated ways in which the new curriculum interacted with other changes that occurred at the same time? What adjustments and improvements should be considered?

The new semester curriculum implemented by the colleges across the University of Minnesota produced three undesirable consequences that we will describe in the pages that follow:

1. **Average student credit load for CLA undergraduates dropped by .70 credits between the 1998-99 and 1999-00 academic year.** This reduction in average credit load will lengthen the time to graduation as students will take more semesters to complete the 120 credits they need for a diploma. The credit load drop occurred most noticeably among juniors and seniors who encountered predominantly 3-credit upper division courses. This reduction in average credit load stemmed from the difficulty some students had in scheduling the five 3-credit course needed to carry a full (15-credit) load and the difficulty some students had in managing the workload associated with some courses as currently configured.

2. **With the move to semesters there was a University-wide decline in the propensity of undergraduates to take courses outside of their home college and a parallel decline in the propensity of undergraduates to take courses within the College of Liberal Arts.** Curricular changes within individual colleges, the proliferation of new Liberal Education courses, and steering by advisers and faculty, created barriers, opportunities, and disincentives most likely discouraged undergraduates from exploring the great diversity of disciplines, ideas, and intellectual perspectives that exist across the University of Minnesota.

3. **Together, the drop in average student credit hours and shifts in the pattern of course taking across colleges produced a substantial decline in tuition revenue in CLA.** The tuition shortfall in CLA produced an imbalance between planned revenues and planned expenditures. A closer alignment of resources with academic priorities is needed to ensure that CLA can continue to enhance the quality of its undergraduate and graduate programs.
provide competitive compensation for all employee groups, support faculty scholarship and creative work, and provide support staff, equipment, and facilities to serve the teaching, research, and outreach missions of the college.

The recommendations in this working paper stem from our analysis of hypotheses, ideas, and suggestions that the college Curriculum, Instruction, and Advising (CIAA) Committee, the Budget Advisory Committee (BAC), and the Council of Chairs put forward during spring 2000. Some proposals require action by the college administration, some by the faculty, some by CLA departments; some require consultative discussion and action by the appropriate collegiate committees; others require action by the Executive Vice President and Provost. Some steps have already been taken; others still need to occur.

Our analysis of the many ideas put forward suggests three general strategies:

- The faculty, departments, and college should work together to fine tune the college’s semester curriculum, to better serve our students while doing so in a fashion that is mindful of the implications for tuition revenue.

- The Executive Vice President and Provost should ensure that the curricular principles articulated in the 1998 CLA Compact are put into practice:

  1. Colleges should develop courses within their own areas of expertise;
  2. Colleges’ curricula should reflect the mission of the college and should not duplicate other colleges’ curricula;
  3. Students in all colleges should be encouraged to avail themselves of the broad curricular opportunities that exist at the University of Minnesota.

- The faculty, departments, and college should work together to deploy the college’s various instructional resources in a manner that better matches available resources to academic priorities.

The suggestions we make in this working paper are just that — suggestions. We look forward to our colleagues across the college joining in full and thoughtful discussion of these ideas. Our position is not that our recommended next steps are the only ones that can be taken. Other creative ideas will undoubtedly surface as the deliberations unfold. We do believe, however, that the current situation is not sustainable, and some adjustments must be made now. We are certain that failure to act will hurt our students and will force reductions in collegiate activities to absorb the recurring shortfall in resources. Fall 2000 is the time for faculty, staff, students, academic units, the CIAA Committee, BAC, CLA Assembly, and Executive Vice President to discuss these issues. Following these discussions, actions should be taken by December 2000. The changes should be fully implemented as soon as possible thereafter and certainly in time for the start of the 2001-02 academic year.

Suggested Adjustments to the CLA Semester Curriculum to Ensure that Course Credit is Commensurate with Course Workload

During the 1996-97 academic year, the college’s CI & A Committee and Assembly considered whether the college should have a predominantly 3-credit or 4-credit upper division undergraduate curriculum. Many faculty argued that a 3-credit curriculum would provide a broader education because students would need to complete a greater range of courses than they would if all courses carried 4 credits. This argument prevailed and departments implemented predominantly 3-credit upper division semester courses.
Credit Distribution of CLA Undergraduate Courses, Fall Semester 1999

<table>
<thead>
<tr>
<th>% of courses, fall semester 1999</th>
<th>1, 2 or 3 credits</th>
<th>4 or 5 credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>1xxx courses</td>
<td>27.7%</td>
<td>72.3%</td>
</tr>
<tr>
<td>3xxx courses</td>
<td>64.7%</td>
<td>35.3%</td>
</tr>
<tr>
<td>4xxx courses</td>
<td>78.1%</td>
<td>21.9%</td>
</tr>
<tr>
<td>5xxx courses</td>
<td>85.3%</td>
<td>14.7%</td>
</tr>
</tbody>
</table>

Because less than one-third of the upper division (3xxx, 4xxx, and 5xxx) courses carry more than 3 credits, many juniors and seniors must enroll in five 3-credit courses to carry a full (15-credit) load. For many students, scheduling and managing five courses has proven difficult.

- About 75% of CLA's undergraduates hold jobs, and over half of those students work more than 15 hours a week. (These numbers are substantially higher than those at other Big Ten universities.) Work schedules, coupled with the constraints in the time of day that courses are offered, make it difficult for some students to register for five courses per semester.

- Although student workload in a 3-credit semester course was supposed to be equivalent to the workload in a 4-credit quarter course, students reported that some 3-credit semester courses required substantially more work. It appears that keeping courses' course load neutral proved difficult in some cases. The workload in some upper division courses may have discouraged some CLA students from taking a full course load and may have discouraged some students in other colleges from taking CLA courses.

The result is that average student credit loads for CLA undergraduates dropped by .76 credits between the 1998-99 and 1999-2000 academic year. This drop occurred most noticeably among juniors and seniors who encountered the 3-credit upper division curriculum. This reduction in average credit load means that the time to graduation for CLA students will lengthen as students take more semesters to complete the 120-credits required for a diploma. This is an undesirable consequence of the current curriculum.

Some colleagues have suggested that CLA should completely revamp its curriculum and major requirements so that every undergraduate course is a uniform 4 credits. We do not endorse this proposal. Faculty concern over an increasingly narrow undergraduate experience remains compelling. Moreover, our survey of the upper-division social sciences and humanities curriculums within the Big Ten reveals 3-credit not 4-credit upper division curriculums, suggesting that other universities have reached a judgment on this matter similar to the one reached by the CLA faculty.

Recommendation #1: Faculty and departments identify courses where adjustments need to be made to ensure that the number of credits is commensurate with student workload. If the workload is excessive for the number of credits being awarded, the workload should be reduced or additional course credit should be awarded. If additional course credit is being proposed, departments should contact the Academic Programs office at 4-4801 or olegram@clu.umn.edu for help with the request. Course changes for fall 2001 semester should be submitted to the college by early November 2000 to ensure that they are reflected in the fall 2001 printed class schedule. Course changes for the spring 2002 semester should be submitted by early April 2001. In making
this determination, faculty and departments should be cognizant of the University Senate’s standards with respect to course credit.

“One semester credit is to represent, for the average University of Minnesota undergraduate student, three hours of academic work per week (including lectures, laboratory, recitations, discussion groups, field work, study, and so on), or approximately 45 hours of work over the course of an enrolled period” [Section 4A, Standards for the Semester Conversion, April 18, 1996].

“The hours of contact time for a course shall equal at least the number of credits for the course times the number of weeks the course is offered. In the majority of cases, this would mean the number of contact hours per week would equal the number of credits for the course, but the contact hours need not be spread out evenly by week.

A contact hour is defined for these purposes as formal instruction by an individual appointed for that purpose by the department or faculty member, including faculty members, graduate teaching assistants, teaching specialists, or, in unusual instances, advanced undergraduates” [Section 5A, Standards for the Semester Conversion, April 18, 1996].

Departments should keep in mind that contact time can include various types of student-instructor interaction such as lectures, lab work, recitations, discussion groups, tutorials, and instructor-monitored threaded web discussions (e.g. WebCT).

Writing intensive courses should be among the courses reviewed to make sure workload, is commensurate with credits awarded. Although writing across the curriculum has greatly enhanced the quality of the undergraduate education at the University of Minnesota, our sense from conversations with students and faculty is that a writing intensive course may require more work than does an equivalent non-writing intensive course. In a writing intensive course, students have extra contact hours with faculty, teaching assistants, writing tutors, and staff in writing laboratories – all outside of the normally scheduled class hours. Faculty often assign additional written assignments that require students to devote more hours outside the classroom to the course.

In addition to this across-the-board examination of the match between course workload and course credit, there is one specific place in the CLA curriculum where we urge faculty and departments to increase course credit.

Recommendation #3: Introductory language courses at the 1xxx level should be 5-credit courses. Introductory language courses (with the exception of Japanese and Chinese) were converted from 3-credit quarter courses to 4-credit semester courses. Shifting to 4 credits reduced the credit awarded over the full year by 47% rather than by the 33% recommended by the Senate’s semester conversion standards. These introductory language courses have 5 contact hours per week. Restoring these courses to 5 credits would better align student workload with credit hours.

One concern that surfaced during the semester conversion discussions was that 5 credits would result in language courses comprising too large a share of the 120 credits that the typical CLA student would need for graduation. Since that debate – and after consultation with the foreign language departments, the Committee on Second Language Education, and the CI&A Committee – the college instituted a policy that requires new freshmen who have already completed two or more years of high school language instruction to enter a 1-semester intensive course that brings them up to the level of 2 semesters of language proficiency by the end of that 1-semester course. This new policy has virtually
eliminated the "false beginner" problem, has made for a more prudent deployment of college's teaching resources, and has reduced the number of semesters (from 4 to 3) that most students take language instruction to achieve the level of proficiency needed for graduation. This change, already instituted, along with the proposed increase in credits for introductory language courses from 4 to 5 credits, would mean that most students would take 15 credits of language instruction (versus the 16 credits imagined during the semester conversion debate). For the vast majority of CLA students, the proposal to increase the credit hours for the 1xxx-level, introductory language courses will not increase the proportion of their 120 degree credits comprised of language instruction.

In summary, these first two recommendations will better align the credits awarded for CLA courses with the workload demanded of our students. These adjustments will also reduce, down to one, the number of semesters in which students will need to register for five courses thus making four-year graduation attainable for more students. These changes, if instituted, would ensure that on the one occasion when students need to take five courses, they will confront a manageable workload.

If these suggested changes were put in place, the typical course-load for CLA students over their four years at the University of Minnesota would look like this:

| Proposed Typical Course-Load for CLA Students at the University of Minnesota |
|---------------------|---------------------|---------------------|---------------------|---------------------|
|                      | Fall               | Spring              | Fall               | Spring              |
| Comp 4              | W.I. 4             | Course 4            | W.I. 4             | Course 4            |
| Lang 4              | Lang 5             | Course 4            | Course 4           | Course 4            |
| FrSem 3             | Course 3           | Course 3            | Course 3           | Course 3            |
|                      | Total: 16          | Total: 16           | Total: 16          | Total: 15           |
|                      | Freshman           | Sophomore           | Junior             | Senior              |
|                      | Total: 16          | Total: 16           | Total: 16          | Total: 14           |

Recommendation #3: Academic advisers should continue to encourage students to register for full course loads (at least 15 credits per semester) and to avail themselves of the ½-price tuition that is charged for all credits above 12 in number. Advisers and students need to discuss the tradeoffs and opportunity costs of taking longer than four years to complete a degree. It is a college priority to increase 4-year graduation rates and shorten the time to graduation. Academic advisers should help students develop an academic program that will enable them to graduate in four years.

University-wide Issues

That the Executive Vice President and Provost Should Address

The Incentives for Managed Growth (IMG) formula, which assigns 75% of a student’s tuition for a course to the college that provides the instruction, creates a financial incentive for colleges to prefer that students take courses within their home college rather than elsewhere in the University. (See Appendix A for a discussion of IMG.) With the change from quarters to semesters, there was a substantial and broad decline in the propensity of undergraduates to take courses outside of their home college.
Decline in the Propensity of Undergraduates to Take Courses Outside of their Home College

<table>
<thead>
<tr>
<th>Home College</th>
<th>77-78 &amp; 78-79</th>
<th>79-00</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Human Ecology</td>
<td>49.3</td>
<td>40.7</td>
<td>-8.6</td>
</tr>
<tr>
<td>General College</td>
<td>31.1</td>
<td>33.2</td>
<td>2.1</td>
</tr>
<tr>
<td>Education and Human Development</td>
<td>19.4</td>
<td>17.0</td>
<td>-2.4</td>
</tr>
<tr>
<td>Natural Resources</td>
<td>61.2</td>
<td>59.0</td>
<td>-2.3</td>
</tr>
<tr>
<td>Agriculture, Food &amp; Environmental Science</td>
<td>46.2</td>
<td>44.6</td>
<td>-1.7</td>
</tr>
<tr>
<td>Institute of Technology</td>
<td>23.8</td>
<td>21.4</td>
<td>-2.4</td>
</tr>
<tr>
<td>Carlson School of Management</td>
<td>29.4</td>
<td>28.7</td>
<td>-0.7</td>
</tr>
<tr>
<td>Liberal Arts</td>
<td>38.2</td>
<td>29.3</td>
<td>+8.9</td>
</tr>
<tr>
<td>Architecture and Landscape Architecture</td>
<td>6.8</td>
<td>12.8</td>
<td>+6.0</td>
</tr>
<tr>
<td>Biological Science*</td>
<td>59.6</td>
<td>63.7</td>
<td>+4.1</td>
</tr>
</tbody>
</table>

*The College of Biological Sciences began admitting freshman in fall 1977 which artificially inflated the comparisons between quarters and semesters.

The following have been suggested as possible contributing factors to this decline in the propensity of students to take courses outside of their home college:

-Expanded course offerings by some colleges provided courses that had historically been offered in other colleges.

-Changes in undergraduate curriculum increased the proportion of degree credits that students must complete within their home college.

-Revamping of undergraduate majors increased the proportion of credits needed for graduation that must be completed within the major (and hence within the home college). This reduced the opportunity for students to take electives in other colleges.

-Steering students to stay in their home college or not travel between the St. Paul and Minneapolis campuses decreased the likelihood that students take courses in other colleges.

-Expansion of semesters, 29 new courses outside of CLA were certified as meeting the Liberal Education requirements. (See Appendix B.) These new courses now provide students with the opportunity to meet "core requirements" in Historical Perspectives, Literature, the Humanities, and Social Sciences as well as "theme requirements" in International Perspectives, Citizenship and Public Ethics, Cultural Diversity, and the Environment, without having to take a course in the College of Liberal Arts. Most of the new courses created outside of CLA also permitted "double-dipping," which allows students to take a single Liberal Education course to fulfill two Liberal Education requirements. The doubled value of these courses further increased the incentive for students to enroll in them and further reduced the efficacy of the Liberal Education requirements by allowing students to complete the requirements with as few as 8 courses rather than the 12 envisioned by the standard.
The net result of these changes, made as part of the transition to semesters, has been not only a decline in the propensity of students to take courses outside of their home college, but also a decline in the propensity of students to leave their home college to take courses within CLA.

### Decline in the Propensity of Undergraduates to take Courses Within the College of Liberal Arts

<table>
<thead>
<tr>
<th>Home College</th>
<th>97-98, 98-99</th>
<th>99-00</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Human Ecology</td>
<td>19.6</td>
<td>18.9</td>
<td>-0.7</td>
</tr>
<tr>
<td>General College</td>
<td>19.7</td>
<td>16.4</td>
<td>-3.3</td>
</tr>
<tr>
<td>Institute of Technology</td>
<td>16.4</td>
<td>14.1</td>
<td>-2.3</td>
</tr>
<tr>
<td>Education and Human Development</td>
<td>9.6</td>
<td>7.5</td>
<td>-2.1</td>
</tr>
<tr>
<td>Natural Resources</td>
<td>17.1</td>
<td>15.3</td>
<td>-1.8</td>
</tr>
<tr>
<td>Liberal Arts</td>
<td>71.8</td>
<td>70.7</td>
<td>-1.1</td>
</tr>
<tr>
<td>Carlson School of Management</td>
<td>20.3</td>
<td>19.4</td>
<td>-0.9</td>
</tr>
<tr>
<td>Agricultural, Food &amp; Environmental Science</td>
<td>14.7</td>
<td>14.3</td>
<td>-0.4</td>
</tr>
<tr>
<td>Architecture and Landscape Architecture</td>
<td>2.7</td>
<td>3.6</td>
<td>+0.9</td>
</tr>
<tr>
<td>Biological Science*</td>
<td>20.8</td>
<td>24.0</td>
<td>+3.2</td>
</tr>
</tbody>
</table>

*The College of Biological Sciences began admitting freshmen in Fall 1997 which artificially inflates the comparisons between quarters and semesters.

Other changes, including the introduction of new 1xxx and 3xxx level courses by colleges that had not previously offered such courses, and the greater availability of General College’s base curriculum (designed for its special student population) to students mainstreamed in other colleges, also contributed to this decline.

Colleges should not build barriers, create disincentives, or supply opportunities that prevent or discourage undergraduates from exploring the great diversity of disciplines, ideas, and intellectual perspectives that exist across the University of Minnesota. It is inefficient for the institution as a whole to permit duplication in the University’s curriculum. These practices do not serve University of Minnesota students well and will produce increasingly narrow graduates. We strongly believe that a broad liberal education should include coursework in biology, chemistry, computer science, accounting, animal nutrition, and ecology, for example, and that students are best served when they take those courses in the departments that specialize in these fields. The same principle holds for those disciplines that are housed within CLA. Students interested in history, literature, social studies, economics, statistics, philosophy, ethics, psychology, speech communication, and other cultures, for example, are best served when they take their coursework within those CLA departments that specialize in these subject matters.

In the 1998 CLA Compact, the Executive Vice President and Provost pledged to develop “clear guidelines that assure a strong and diverse curriculum with a minimum of curricular duplication across colleges.” In developing these guidelines, the provost embraced the following principles:

1. Colleges should develop courses within their own areas of expertise;
2. Colleges’ curricula should reflect the mission of the college and should not duplicate other colleges’ curricula;
3. Students in all colleges should be encouraged to avail themselves of the broad curricular opportunities that exist at the University of Minnesota.
Recommendation #6: The Executive Vice President and Provost should take the steps necessary to ensure that these curricular principles are put into practice.

Adjustments to Improve the Administration of CLA's Instructional Resources

The new semester curriculum implemented by the colleges across the University of Minnesota led to a substantial drop in the tuition revenue that the College of Liberal Arts received under the DMB formula. Based on our analysis of the experience at other institutions that had recently undergone semester conversion, the college projected that it would lose from quarters to semesters average student credit loads for CLA undergraduates could drop by .75 credits, leading to a forecasted dip in tuition revenue of $1.862 million. The college's projection of the drop in average student credit loads was right on target: average student credit loads dropped by .76 credits resulting in an actual loss of tuition revenue to the college of $1.877 million.

However, an additional, unanticipated change also occurred. As already noted, as the University moved from quarters to semesters, students who were enrolled in other colleges became substantially less likely - 2.5% less likely than the last year - to take courses within the College of Liberal Arts. Students enrolled in CLA also took fewer of their courses within CLA, although this drop was a modest 1.9%. The drop in the propensity of students in other colleges to take courses in CLA reduced CLA's tuition revenue by $356,783; the drop in propensity of our own students to take courses within CLA reduced the college's tuition by an additional $41,173. (See Appendix C.)

Together the changes in average student credit hours and in the pattern of course taking across colleges reduced CLA's 1999-00 academic year tuition revenue by $3.8 million compared to what it would have been had tuition revenue increased by 3% - the amount of the tuition rate increase over the previous academic year.1 Half of this tuition shortfall - $1.887 million - was due to the drop in average student credit hours - nearly all of which was built into the college's FY00 base budget plan. The remaining $1.876 million drop in revenue was not anticipated and CLA covered the shortfall out of its "Semester Conversion Bank" of non-recurring funds. Fortunately, the college had built up this bank over the previous two years as a hedge against any losses. Sufficient non-recurring funds remain in the Semester Conversion Bank to cover this recurring shortfall through, but not beyond, the 2000-2001 academic year.

For FY00, the shortfall in revenue created an imbalance between planned revenues and planned expenditures. Under this first year of semesters, although actual expenditures were close to the planned amount, actual revenues fell short of target. A closer alignment of resources with academic priorities is needed. We should act in a fashion that ensures the breadth and quality of our undergraduate and graduate programs, facilitates students making timely progress towards the completion of their degrees, ensures our faculty have the time and resources needed to be engaged in cutting edge scholarship, creative work, and outreach and that leaves adequate resources to provide competitive compensation for all employees, groups, and support staff, equipment, and facilities to serve the teaching, research, and outreach missions of the college.

It is critical that the college and its academic units administer instructional resources in a manner that assures that resources are focused on the most important elements of our curriculum, and in

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1 We focus on only academic year tuition because the summer and intercession curriculums are administered so that all administrative and instructional costs are covered by tuition revenue. Hence all incremental tuition revenue received for summer and intercession courses was offset by incremental instructional costs.
a manner that best serves our students. We must effectively match financial resources to student needs and the curricular priorities of the faculty. If there is a mismatch, then neither curricular priorities nor students will be well served. For example:

- if an important upper division course routinely enrolls small numbers of students, but could fill if offered in alternate years;
- if students are denied entry into a course because it is filled to its stated limit, but by the second week of term, there are empty seats;
- if two sections with very low enrollments are not combined into a single section;
- if there are inadequate numbers of courses to meet student demand in a particular subject area, but an oversupply of courses in another subject area; or
- if required courses are scheduled at conflicting times, or during unusual or non-standard time slots,

then instructional resources are not being used efficiently to support the curriculum and meet student demand.

During academic year 1999-2000, the college allocated to its 30 academic departments recurring funding of $41.7 million for regular (tenured and tenure-track) faculty salaries and fringe benefits. An additional $9.6 million recurring was allocated to CLA departments for graduate assistants and other instructional staff (TA & UI). In addition, to this $51.3 million recurring in the base budgets of the CLA academic departments, the college provided $2.9 million of soft allocations for replacement teaching for faculty on leave, or vacant faculty lines, and to cover courses for faculty who were on medical leave. Added to these amounts was an additional $2 million of soft supplemental funding: $3.6 million to meet additional student demand (“course access”) and $4.4 million for the instructional costs of evening courses. Hence, $11 million of the $62.2 million that CLA spent during the 1999-00 academic year to deliver instruction was provided as soft funding supplemental to the department’s recurring instructional budget.

<table>
<thead>
<tr>
<th>Instructional Expenses in CLA for the 1999-2000 and 2000-2001 Academic Years</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sources of Funding</strong></td>
</tr>
<tr>
<td>Recurring funding for regular faculty</td>
</tr>
<tr>
<td>Recurring funding for TA &amp; UI</td>
</tr>
<tr>
<td>TOTAL RECURRING</td>
</tr>
<tr>
<td>Soft allocations for replacement teaching</td>
</tr>
<tr>
<td>Supplemental funding for instruction</td>
</tr>
<tr>
<td>TOTAL SOFT</td>
</tr>
<tr>
<td>TOTAL RECURRING + SOFT</td>
</tr>
</tbody>
</table>

* committed to date
** estimate
Reduced reliance on supplemental instructional funding of instruction will help address the imbalance between the current expenditures for instruction and the current level of tuition revenue. Reduced reliance on supplemental instructional funding will also free up resources for other collegiate priorities. For this to happen, the first priority for recurring instructional dollars within departmental budgets must be the delivery of the essential curriculum. Any supplemental funding provided through course access and evening overload teaching should be used to meet additional and unanticipated student demand. With the addition of new incremental tenured and tenure-track faculty, the provision of new recurring dollars in departmental teaching assistant and unassigned instruction budgets, and faculty teaching as part of their regular teaching load courses that are the department’s highest curricular priorities and that respond to student demand, reliance on these supplemental funds should decrease.

Steps Already Taken

Action #1: Departments and the college are managing course enrollments to ensure that the actual enrollment in a course after the start of term more closely aligns with the enrollment target for the course. For example, some courses have set slightly higher enrollment limits in recognition of the attrition that normally occurs during the first two weeks of the course. In some cases, limits for a fall semester course are slightly higher than for spring, because there is more attrition in the fall.

Action #2: Departments and the college are managing enrollments to ensure that the appropriate number of sections for courses are opened so as to minimize the number of poorly enrolled sections. This strategy provides a better use of supplemental resources and guarantees an adequate number of students for a good educational experience in the sections.

Action #3: Departments and the college have worked together to improve the information available to identify opportunities for more effective course scheduling. The college and departments now have a more integrated picture of the entire curriculum that pulls together in a single database all courses—regardless of the time of day they are taught or the source of funds used to cover the instructional costs.

Additional Suggestions

Departments have an ongoing responsibility to ensure that they are using their instructional resources in a way that meets the essential components of their graduate and undergraduate curricula and that also serves students in their programs, in the college, and from across the University.

Recommendation #5: Departments focus their regular and affiliated faculty instructional efforts on priority courses. During the fall 2000 semester, departments should review their curriculum to identify the courses that constitute their highest curricular priorities. These courses should be staffed with regular or affiliated faculty as part of the faculty’s regular teaching load. Departments should also identify courses that should be offered less frequently, courses that can be dropped from the curriculum, and courses that should be staffed only if instructional resources are available to do so when student demand is sufficient.
Recommendation #6: During the fall 2000 semester, departments identify courses that experienced a drop in enrollments during the transition from quarters to semesters and develop strategies for either restoring the lost enrollments or adjusting the frequency with which these courses are offered.

Recommendation #7: During the fall 2000 semester, the college and the CI&A committee evaluate the number of writing intensive courses and the total number of "seats" that are available in the CLA curriculum to ensure that appropriate numbers are being offered. An excessive number of writing intensive courses may discourage students from aggressively sampling courses outside of their major and may also increase the cost of instruction beyond what is needed to serve our students well. It may also move teaching assistants away from being available to support high-demand introductory courses.

Recommendation #8: The college should continue to work with departments to help identify the times of the day and days of the week that would be optimal to schedule courses. CLA courses should meet at standard class hour meeting times. Departments should consider offering some of their graduate seminars in the evening, at times that do not conflict with undergraduate courses in which the graduate students assist and at times when there is a greater availability of seminar rooms.

Recommendation #9: The Executive Vice President and Provost should ensure that the remaining inadequacies of PeopleSoft and the related systems and processes are addressed so that the administrative tools and data are available so the college can monitor the curriculum, enrollments, and tuition revenue in a timely fashion.

Conclusions

We are reasonably confident that if these recommended steps are taken, the undesirable consequences of semester conversion will be corrected. Actions by departments, the college CI&A Committee, and the Assembly can reverse the drop in average undergraduate credit loads, shorten time to graduation, and boost four-year graduation rates. Actions by the Executive Vice President and Provost can reduce curricular duplication, and lower the barriers, opportunities, and disincentives that have discouraged students from exploring the great diversity of disciplines, ideas, and intellectual perspectives that exist across the University of Minnesota. Actions by CLA departments and college administration can help ensure that CLA's level of resources are used efficiently in a way that meets the academic priorities of the faculty and the needs of our students.

As we stated at the outset of this working paper, we look forward to a full and thoughtful discussion of these ideas and other ideas that will undoubtedly arise as the deliberations unfold. Whatever next steps are taken, they must be taken now, during fall 2000. Failure to act will not be in the best interest of our students and will force reductions in collegiate activities to absorb the recurring shortfall in resources.
Summary of Recommendations

Recommendations to CLA Faculty and Departments

- Recommendation #1: Faculty and departments identify courses in which adjustments need to be made to ensure that the number of credits is commensurate with student workload.
- Recommendation #2: Introductory language courses at the 1xxx level should be 5-credit courses.
- Recommendation #3: Departments focus their faculty instructional efforts on priority courses.
- Recommendation #4: During the fall 2000 semester, departments identify courses that experienced a drop in enrollments during the transition from quarters to semesters and develop strategies for either resuming the lost enrollments or adjusting the frequency with which those courses are offered.
- Recommendation #5: The college should work with departments to help identify the times of the day and days of the week that would be optimal to schedule courses.

Recommendations to the CLA C&I&A Committee and CLA Assembly

- Recommendation #6: Faculty and departments identify courses where adjustments need to be made to ensure that the number of credits is commensurate with student workload.
- Recommendation #7: Introductory language courses at the 1xxx level should be 5-credit courses.
- Recommendation #8: During the fall 2000 semester, the college and the C&I&A committee evaluate the number of writing intensive courses and the total number of "write" "semes" that are available in the CLA curriculum to ensure that appropriate numbers are being offered.

Recommendations to CLA Administration

- Recommendation #9: The college should work with departments to help identify the times of the day and days of the week that would be optimal to schedule courses.

Recommendation to Academic Advisors

- Recommendation #10: Academic advisors should encourage students to register for full course loads (at least 15 credits per semester) and to avail themselves of the ¾ price tuition that is charged for all credits above 12 in number.

Recommendations to the Executive Vice President and Provost

- Recommendation #11: The Executive Vice President and Provost should take the steps necessary to ensure that the compact curricular principles are put into practice.
- Recommendation #12: The Executive Vice President and Provost should ensure that the remaining inadequacies of PeopleSoft and related systems and processes are addressed.
Appendix A

Incentives for Managed Growth (IMG)

Under Incentives for Managed Growth (IMG), tuition revenues are distributed by formula: 75% to the college of the course designator, and 25% to the student’s “home” college. (For example, if a student’s tuition is $1,000 and the student is enrolled in college A, then $750 is attributed to College A. Of that student’s remaining 75% or $750, if the student is taking 5 credits in college A and 5 credits in college B, then $375 is attributed to college A and $375 to college B.) IMG distributes the risks and benefits to the colleges generating the tuition revenues. Each college is responsible for covering its own costs of instruction. If a college’s actual revenue is more than was anticipated for the year, the college retains the additional funds. If a college’s actual revenue is less than was anticipated, the college must absorb the loss. Under IMG, therefore, there is a direct connection between enrollments and revenues, as well as an incentive for colleges to administer instructional costs in a cost-effective way. For fiscal year 1999-00 59% ($60 million) of CLA’s $102 million in non-sponsored revenues came from tuition revenue. Most of these resources (83%) were (and continue to be) used for compensation (salaries and fringe) for faculty, graduate students, administrative staff, and for civil service and bargaining unit staff.
<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Title</th>
<th>Department/Field</th>
<th>Core</th>
<th>Theme</th>
<th>WJ</th>
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<tr>
<td>AGRO 1100</td>
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<td>Environment</td>
<td>Core</td>
<td>Environment: Citizenship and Public Ethics</td>
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<td>International Perspectives, Citizenship and Public Ethics</td>
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## Appendix C

### Impact of Semester Conversion on CLA Academic Year Tuition Revenue

(Updated September 25, 2000)

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
<th>Value</th>
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<tr>
<td>a</td>
<td>1998-99 academic year tuition revenue (actual)</td>
<td>$57,385,118</td>
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<td>b</td>
<td>Projected 1999-00 academic year tuition revenue if semester conversion had not occurred (a*1.03), which was a 3% tuition increase</td>
<td>$59,166,672</td>
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<td>Budgeted (planned for) loss in academic year tuition revenue due to semester conversion based on an anticipated .75 credit load drop for CLA students</td>
<td>($1,741,195)</td>
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<td>Budgeted 1999-00 academic year tuition revenue (b-c)</td>
<td>$57,645,477</td>
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<td>1999-00 academic year tuition revenue (actual)</td>
<td>$55,041,415</td>
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<td>f</td>
<td>Unanticipated tuition revenue shortfall (e-d)</td>
<td>($1,601,099)</td>
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<td>Total loss of academic year tuition revenue due to semester conversion (e-f)</td>
<td>($1,601,099)</td>
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<td>% loss of academic year tuition revenue due to semester conversion (g/a)</td>
<td>-6.4%</td>
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<td>i</td>
<td>Loss of tuition revenue due to .76 reduction in average student credit load for CLA students</td>
<td>($1,886,987)</td>
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<td>j</td>
<td>Loss of tuition revenue due to 2.9% decline in students from other colleges taking courses in CLA</td>
<td>($836,703)</td>
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<td>k</td>
<td>Loss of tuition revenue due to 1.9% decline in CLA students taking fewer of their courses in CLA</td>
<td>($841,175)</td>
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<td>l</td>
<td>Other factors</td>
<td>($1,230,324)</td>
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<td>m</td>
<td>Total loss of academic year tuition revenue due to semester conversion (i+j+k+l)</td>
<td>($3,763,237)</td>
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