

Consideration of a Fall Break at the University of Waterloo

Executive Summary

The upcoming (Fall 2014) undergraduate student referendum on the desirability of a Fall Break and recent adoption of a Fall Break on a three-year trial period by Wilfrid Laurier University have independently re-ignited the discussion at the University of Waterloo. Fourteen Ontario universities currently have a Fall Break, varying from 2-5 days in length. UW is among a small number of institutions within Ontario who do not currently have one.

The primary challenge to arranging a Fall Break is finding sufficient space to schedule: 60 teaching days, a minimum of 2 pre-exam study days, and a minimum of 12 exam days while finishing by December 22. This challenge seems relatively easy to accomplish most years but is complicated by the occasional late Labour Day holiday.

The most promising way forward is to start classes earlier by abbreviating or changing Orientation activities, so that classes commence on the Thursday following Labour Day. The fact that the English Language Proficiency Exam (ELPE) is no longer written during Orientation Week, and in recent years, the institution has been engaging undergraduate students prior to their arrival on campus via an effective communication and transition strategy, suggest a shortened Orientation week is a reasonable approach to finding space in the term to accommodate a Fall Break.

There are other mechanisms that could be adopted in order to find additional space in the term. They include: allowing Sunday exams, or ending the exam period a day later (December 23, instead of December 22). It would likely be necessary to use either of these options on the rare occasion (every seventh year) when Labour Day is comparatively late in the term. It is important to note that the level of challenge for scheduling will vary from year to year, depending on when Labour Day occurs.

The 6 key recommendations of this report are the following:

1) Settle on a terms of reference for a term break. This should apply to the existing Winter “Reading Week” and to any Fall Break that may be adopted in the future. This would serve to clarify the expectations and responsibilities of students (including graduate students) and instructors related to any mid-term break. Even if a Fall Break is not approved, these terms of reference should be considered for the Winter Break.

2) Consult openly and thoroughly with all stakeholder groups. The adoption of a Fall Break would impact much of the university community and hence broad consultation is paramount to the decision as to whether or not to proceed. Groups to be engaged include students, faculty, staff, administration and student services.

If a Fall Break is adopted, the following are recommended:

3) The break should be 2 days in length. Making the break 2 days in length will be easier to facilitate and adding it to the existing Thanksgiving break ensures an adequate duration (5 days). There are significant issues concerning Co-operative Education regarding this timing, however, and these issues require thorough examination.

A possibility that should be considered is varying the length of the Fall Break depending on when Labour Day falls. Thus, depending on the year, the Fall Break could be lengthened to take advantage of years when there is an earlier scheduling of Labour Day.

4) Consider changing the start date for classes. Orientation week can be modified in order to facilitate a break later in the term. Changes may include new or different activities but also timing of existing activities. A few key changes here could facilitate a break that could aid all students later in the term. This may be a worthwhile tradeoff from which the whole university community might benefit. Starting Fall classes on the Thursday of Orientation week vastly simplifies the scheduling of final examinations and allows the maintenance of pre-examination study days, no scheduled Sunday examinations, examination period ending on December 22, and 60 teaching days in the term.

5) Consider adopting a Fall Break on a trial basis for a period of 2 or 3 years. This may help with establishing a better understanding of emergent issues and challenges. We should be prepared to monitor and alter the break or return to the *status quo* if the benefits do not significantly outweigh the challenges or inconveniences.

6) Develop wellness education and awareness-building initiatives. This is to be done in conjunction with other wellness efforts on campus that inform students on how to maintain wellness, and how best to capitalize on a Fall Break.

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Introduction

This report was requested by the previous Vice-President, Academic and Provost, Geoff McBoyle, in response to the recently revitalized discussion of a Fall Break at the University of Waterloo in anticipation of a student referendum in the Fall 2014. Another important influence was Wilfrid Laurier University's recent adoption of a Fall Break, for a 3-year trial period.

Discussion on Fall Breaks at UW has occurred in the recent past. In 2009, there were conversations with some key stakeholders and in 2011, 12 focus groups with over 100 first and upper year undergraduate students were organized – reactions at the time regarding a Fall Break were mixed and no planning to install a Fall Break emerged.

The implementation of a Fall Break, along with other institutional interventions, together can have an overall positive impact on the campus culture around promoting and supporting wellness. Thoughtful consideration of a Fall Break at UW must be informed, however, from several key perspectives – faculty, staff and student groups, as well as administration. Structural issues, such as duration of the break, when it occurs, and adjustments to the academic schedule (including final exam period) all need to be considered to establish feasibility. Scheduling of a Fall Break needs to be considered in the context of priorities at the University of Waterloo – importantly, it should occur at an optimal time in the term for a break for the majority of our students.

The 2014/2015 academic calendar is already set, so the earliest possible Fall term that could be considered is 2015. This would require that consultations occur and approvals be received in a timely fashion this Fall.

Rationale for considering a Fall Break

Fourteen Ontario universities currently have a Fall Break, varying from 2-5 days in length, evidently scheduled without jeopardy to their academic programming. In light of this, UW is an anomaly within the province.

Promotion of sound mental health is widely claimed as the rationale for installing a Fall Break, although hard data to support this assertion is lacking. Students, counselors, instructors and academic advisors will, however, readily attest that the Fall term is widely seen as a “pressure cooker”, especially in regards to transitioning issues and looming midterm exams for new incoming students. The University of Waterloo, among numerous other Ontario institutions, is keenly aware of the need to provide conditions that promote the physical and mental well-being of our students. An institution whose actions promote mental health well-being will be well regarded by undergraduate and graduate students, prospective students and their parents.

The Fall Break Task Force – composition and mandate

A Fall Break Task Force (hereinafter referred to as the Task Force) was constituted to include wide stakeholder representation and charged to provide to the university community:

- an outline of all scheduling options considered for a fall break, with pros/cons for each option. The various trade-offs are to be explored and implications they might present anticipated.
- a recommended option, should one become clear to the group. Note the task force was not asked to determine or take a position on whether the university should adopt a Fall Break.
- any resources relevant to informing future discussions regarding the merits of adopting a Fall Break.

The Task Force met 4 times between June and August, 2014. Membership on the Task Force was as follows:

- Mario Coniglio, Associate Vice-President, Academic (Chair)
- Ron McCarville, Associate Dean for Undergraduate Studies, Applied Health Sciences
- Stephane Hamade, Vice-President, Education, Federation of Students
- Rebecca Little, Academic Affairs Commissioner, Federation of Students (representing Stephane Hamade)
- Allyson Francis, Undergraduate-student-at-large, Faculty of Engineering
- Robbie Henderson, Vice-President, Student Affairs, Graduate Students Association
- Coleen Even, Vice-President Communications and Events, Graduate Students Association (representing Robbie Henderson)
- Maya D'Alessio, Board of Directors, Graduate Students Association (representing Robbie Henderson)
- David Porreca, FAUW president
- Jasmin Habib, FAUW representative
- Lynn Judge, Graduate Studies Office
- Ray Darling, Registrar
- Pam Charbonneau, Director, Student Success Office
- Victoria Lehmann, Administrative Support, Associate Provost Students Office

Establishing the terms of reference for a Term Break

Mid-term breaks, regardless of the term in which they occur, should have the same terms of reference. Currently, the nature of the Winter “Reading” Week at Waterloo is not defined, although it involves the cancellation of all academic meetings (classes, labs, tutorials, seminars, exams, etc.) during the mid-February week following the statutory Family Day holiday (Monday). There are no formal guidelines as to whether academic work can be made due during this week. However, administrators have favoured delaying deadlines until the resumption of classes. Furthermore, graduate classes have been affected by this break unevenly - some instructors have cancelled classes, while others have not. Co-op interviews continue during the week and this is the only formally articulated statement related to the Winter Reading Week. Special activities, such as Pharmacy’s clinical rotations, also continue during the Winter Reading Week.

We suggest that the terms of reference below be applied to any mid-term break (including the existing Winter Reading Week and the currently-being-discussed Fall Break):

A mid-term break (e.g., Winter Reading Week) is intended to act as a pause for on-campus students to reflect upon and catch up on their term's work to date and, as necessary, prepare for any upcoming mid-term assignments and assessments.

During this pause, there are to be no scheduled meetings for students (e.g., classes, labs, tutorials, seminars, exams). While exceptions may exist (e.g., co-operative employment interviews, Pharmacy's clinical rotations, PhD comprehensive exams, graduate thesis defenses), the pause applies to meetings involving both undergraduate and graduate students.

Deadlines for student submissions should not be scheduled during the break. Student services, such as Health Services, Counselling Services, the library, residences, etc. are expected to continue working at full capacity.

Guiding principles, constraints and impacts

The following section examines the key factors to consider in furthering the discussion of a Fall Break, including relevant guidelines, organizational and scheduling issues, and stakeholder interests. Factors related to scheduling are emphasized. Although the Task Force has identified numerous concerns from various stakeholder groups, **there remains the need to consult formally with these groups** to ensure the full spectrum of concerns is brought to the discussion table. Scheduling concerns relate to the need to preserve a number of necessary (e.g., number of teaching days and exam days) and desirable (e.g., number of pre-exam study days, no Sunday exams) attributes of the Fall term.

It was the Task Force's collective sense that resistance to the Fall Break idea arises, not from the break itself, but rather concern over trade-offs made while arranging the break. In the following, we lay out various trade-offs and suggest the implications they might present.

Start of Fall academic term

Viewing orientation of new students as a process instead of a series of events during a particular time period is more reflective of current student development and transition philosophy and practice. Our current Fall undergraduate orientation program normally starts the Sunday evening before Labour Day and extends to the Saturday after Labour Day, with classes beginning the Monday of the following week.

Our existing institutional guidelines indicate that there are normally 60 teaching days each term. The current guidelines indicate that a clear rationale for having fewer than 60 days necessitates Senate approval. So while it is possible to have fewer than 60 teaching days, shortening the term does not appear to be in the best interests of our students nor our teaching mission.

As will become apparent in the following discussion, changes to the start of classes and to orientation are considered to be a feasible option to make space for a Fall Break.

Starting classes two-days earlier

A revamped Orientation Week could effectively include the start of classes on the Thursday and Friday of that first week. This early start would mitigate complications for the December exam schedule, particularly in years when Labour Day is late (e.g., September 5, 6 or 7).

However, some faculty members worry that upper year students might deliberately skip the scheduled Thursday and Friday classes in favour of starting to attend classes a few days later on the following

Monday. It is relevant to note that the majority of universities in Ontario start classes on Thursday or earlier in the week and they do not seem to have issues with students skipping classes. Perhaps more important is that an early start to classes would mean instructors and course-support staff would be required to begin their work earlier in the term.

Duration of Orientation Week

The duration of Orientation Week is potentially flexible, in part the result of developments concerning the English Language Proficiency Exam (ELPE) which, in past years, was written toward the end of Orientation Week. Furthermore, in recent years, the institution has been engaging undergraduate students prior to their arrival on campus via an effective communication and transition strategy, which could potentially also be utilized to further assist with Orientation. As well, there is value in considering extending Orientation-type activities judiciously into the first few weeks following the start of classes.

Scheduling of move-in days

The usual Orientation Week move-in days (Sunday and Labour Day Monday) could be scheduled earlier to be Saturday-Sunday move-in days, freeing up Monday (Labour Day) for Orientation activities. The possibility of scheduling some Orientation activities during evenings of Orientation Week, and perhaps even Sunday following Orientation Week could be considered as well.

Earlier move-in days are a feasible option. However, as with starting classes 2 days earlier, facilitating an earlier move-in period would require the availability of more paid staff and volunteers sooner into the Labour Day weekend, as well as residence staff prior to the weekend to prepare residences for the incoming class.

Scheduling Orientation Week before Labour Day weekend

Starting Orientation activities before Labour Day may be problematical on several fronts, the most important being the encroachment of limited holiday time availability for instructors, staff, grad students involved as TAs in courses during the Spring term; graduate student orientation, the early return to campus for Orientation leaders; and complications related to accommodation (leases for off campus accommodations typically start September 1). This option is not considered feasible.

December exam period

The Fall exam period should have no fewer than 12 days, a reflection of our current inventory of suitable exam venues. Due to the latest possible scheduling of Labour Day in the Fall 2015 term, an extra day will have to be found in the Fall term, even without adoption of a Fall Break. This could mean a Saturday teaching day perhaps in the last week of classes (as was previously done in 2009 when Labour Day was September 7), for example, or perhaps allowing exams to be scheduled on the first Sunday of the exam period. Either of these changes would allow for a 12-day exam period. Fall terms with earlier Labour Days will not have this problem. Issues concerning Sunday exams are elaborated further below.

Pre-exam period study days

Pre-exam study days ensure that students have the opportunity to prepare for their final assessment in all courses taken during the term. Our existing guidelines dictate that there be no fewer than 2 study days (excluding Saturday, Sunday and holidays) between the end of classes and the beginning of exams. A reduction in the number of study days would be seen to offset any benefit from a Fall Break, however, therefore reducing the number of pre-exam period study days should not be considered a feasible option.

End of exam period

The existing guidelines stipulate that no Fall term exams are to be scheduled later than December 22. Allowing scheduling of final exams to December 23 would allow one day to be gained, and appears to be feasible, although potential impacts to the university community relate to holiday travel plans; problematical exam scheduling for exams postponed due to emergency closure late in the exam schedule; less time for instructors and TAs to mark exams written late in the exam period; delaying the processing of Fall term grades in the new year; and significant impact on Waterloo and University College residences' ability to turn rooms over in time for new students moving in for the Winter term. This option is not as intractable as those that involve inflexible constraints, such as number of teaching days and number of exam days but is not a favoured approach to ensuring the minimum number of exam days.

Sunday exams

Allowing Sunday exams to be included in the normal exam schedule (when required¹) will generate up to 2 additional days that are available for the writing of exams. It is only in those years when Labour Day is late (e.g., September 7) when Sunday exams might be considered to obtain additional exam days during the exam schedule.

There was concern expressed by faculty over Sunday exams on the basis of work-life balance. We note that additional work-life balance opportunities offered by a Fall Break may offset this concern but we also acknowledge that this is likely to be a sensitive issue. As well, concerns over religious observance may emerge. However, we note that Sunday exams (and therefore attending to them by faculty and graduate student proctors) are already permitted under exam regulations. Sunday exams are not addressed in the Faculty Memorandum of Agreement but they are permitted if an exam must be rescheduled, as articulated in the institutional exam regulations (click here: [examination regulations](#)). When scheduled final exams cannot be written due to emergency closure, the date chosen for writing the postponed exam will be the next available day when exams have not been scheduled, which can include Sunday.

The Task Force did not learn of any strong opposition by undergraduate students to Sunday exams, although graduate students (through the Graduate Students Association Council) voiced their concern as they relate to their exam proctoring duties.

While we consider Sunday exams to be a feasible way forward to generate the required number of exam days during the exam period, it comes with significant risk, and therefore is not a preferred option. If Sunday examinations are allowed, scheduling of examinations due to emergency closure becomes problematical on several fronts. This could mean, for example, postponed exams are written early in the subsequent Winter term; delays in academic progression requirements; and TA responsibilities for graduate students are carried over to the new term and may conflict with their new responsibilities. However, having only one Sunday exam day, the first in the exam schedule, mitigates some of the risks associated with weather emergencies as the second Sunday is still available. A compressed exam schedule in which Sundays are used to schedule exams also is taxing on students writing the exams, as well as the faculty, staff and graduate student proctors who must then attend to them.

¹Including one Sunday exam day in the Fall 2015 exam period will allow the minimum 12 days for the exam period and the normal conclusion to the exam period (December 22). An alternative is using a Saturday later in the term as a teaching day.

Characteristics of a Fall Break

Length of a Fall Break

Fall Breaks at other institutions vary in duration, and also vary as to when they are scheduled. WLU scheduled their Fall Break to include the 4 days (Tuesday to Friday) immediately following the Thanksgiving Monday, effectively providing 9 sequential class-free days for most students. Their choice necessitated allowing Sunday exams during the Fall exam period, evidently eliminating the flexibility of using these days for postponed exams if a weather-related closure forced rescheduling.

The Task Force examined numerous scenarios for scheduling a Fall Break. Fixed references were a minimum of 12 exam days with exams ending on December 22. Variables included the number of days in the Fall Break (2 or 4), the number of study days between the end of classes and the beginning of exams (from none to 2), duration of Orientation Week (full vs. a 3-day Orientation week where classes commence on the Thursday of that week) and the possibility of Sunday exams. The task force did not consider a Fall Break of 3 or 5 days as it could readily delineate the key issues to be grappled with the 2 chosen scenarios.

For the 4-day scenarios considered for Fall 2015 (the most challenging year to schedule due to the latest possible Labour Day), there were no feasible solutions that balanced the need to have a minimum of 2 study days, no Sunday exams and ending the exam period on December 22. Even with scenarios having a shortened Orientation Week (i.e. classes start the Thursday of Orientation Week), ending the exam period on December 22 would require acquiring 2 final exam days from some combination of the 2 pre-exam study days or the 2 Sundays available in December during the exam period.

Feasible scenarios involving a 2-day Fall Break were comparatively easier to schedule. A 2-day Fall Break satisfies the need to “pause” in the term (especially if it is attached to the Thanksgiving weekend – discussed further below), while at the same time, allowing an acceptable exam period preceded by 2 study days. Moreover, an Orientation Week shortened by 2 days would mean the exam schedule would not need to be modified by having fewer pre-exam study days, Sunday exam writing, or extending the schedule to December 23. An exception is related to every seventh year when Labour Day is on September 7. As mentioned earlier, for Fall 2015 when Labour Day is September 7, it is likely that a Saturday teaching day in the last week of classes will be required to allow for 12-day exam period, or alternatively, the first Sunday in the exam schedule could be used. We reiterate - the Fall 2015 schedule is the most difficult to work with due to the late Labour Day. Subsequent years become progressively easier to schedule as Labour Day occurs earlier into September.

A possibility that should be considered is varying the length of the Fall Break depending on when Labour Day falls. Thus, depending on the year, the Fall Break could be lengthened to take advantage of years when there is an earlier scheduling of Labour Day.

Timing of a Fall Break

Extending forward from the 3 days of the Thanksgiving weekend provides the most advantage to students. If a 2-day break is adopted, that would provide 5 sequential days – a significant pause in the academic term that coincides with the timing of mid-term exams.

On the surface it seems convenient to schedule a Fall Break to coincide with WLU’s Fall Break, but the rationale for doing so weakens significantly if UW adopts a shorter break than the 4 days WLU decided upon or at another time in the term. Our understanding is that the scheduling of the Fall Break at WLU

was arrived at via compromise; the original preference of senior administration was a 2-day break later in the term.

It is important to note that Co-operative Education will be significantly impacted by a Fall Break, particularly if the break is scheduled to extend the Thanksgiving weekend. Their recruitment work during the Fall term is the most challenging of the year, because they are focused on securing co-op placements for the highest number of students scheduled out to work in the following term. An option that would have minimal impact for Co-operative Education would be to have the Fall Break occur in the last week of October, following the main round match. Clearly, Co-operative Education needs to be very much a consideration in the discussion of the timing of a Fall Break due to the impact on their schedule of activity.

Other impacts of a Fall Break

Graduate students

The potential impact of a Fall Break on UW graduate students is significant from several perspectives. As students taking courses, the rationale for a Fall Break should also apply to graduate students. In their role as TAs, their concerns would be aligned more closely to those of faculty and staff. Furthermore, a number of our graduate programs have collaborations with other institutions (e.g., history, geography, physics, chemistry), which may or may not have a Fall Break coincident with one adopted by UW.

Online courses

Discussion of the impact of a Fall Break on online courses requires consideration of how the offering of online courses should be changed (if at all) to realize the same benefits accrued to online students as for on-campus students during the Fall Break.

Course scheduling issues

The impact of a Fall Break needs to be considered in courses where there is special scheduling, for example, in Science laboratories that are scheduled in alternating weeks.

Recommendations

1) Settle on a terms of reference for a term break. This should apply to the existing Winter “Reading Week” and to any Fall Break that may be adopted in the future. This would serve to clarify the expectations and responsibilities of students (including graduate students) and instructors related to any mid-term break. Even if a Fall Break is not approved, these terms of reference should be considered for the Winter Break.

2) Consult openly and thoroughly with all stakeholder groups. The adoption of a Fall Break would impact much of the university community and hence broad consultation is paramount to the decision as to whether or not to proceed. Groups to be engaged include the following:

- Undergraduates Students – Orientation Steering Committee, Orientation leaders (FOC), Federation of Student Council, Undergraduate Student Relations Committee

- Graduate Students – Orientation Steering Committee, Graduate Orientation organizers (Student Success Office, Graduate Studies Office), Graduate Students Association Council, Graduate Student Relations Committee
- Faculty Association and Staff Association (to hear from professors and instructional staff such as lab instructors)
- Administrative Officers – undergraduate and graduate Associate Deans in Faculties, Associate Deans in AFIW, Department Chairs, School Directors
- Student support services – Registrar Office, GSO, Housing and Residences, CECA (Co-operative Education), Athletics, Food Services and others
- Other institutions with which we have partnerships
- Faculty Councils

If a Fall Break is adopted, the following are recommended:

3) The break should be 2 days in length. Making the break 2 days in length will be easier to facilitate and adding it to the existing Thanksgiving break ensures an adequate duration (5 days). There are significant issues concerning Co-operative Education regarding this timing, however, and these issues require thorough examination.

A possibility that should be considered, however, is varying the length of the Fall Break depending on when Labour Day falls. Thus, depending on the year, the Fall Break could be lengthened to take advantage of years when there is an earlier scheduling of Labour Day.

4) Consider changing the start date for classes. Orientation week can be modified in order to facilitate a break later in the term. Changes may include new or different activities but also timing of existing activities. A few key changes here could facilitate a break that could aid all students later in the term. This is a worthwhile tradeoff from which the whole university community might benefit. Starting Fall classes on the Thursday of Orientation week vastly simplifies the scheduling of final examinations and allows the maintenance of pre-examination study days, no scheduled Sunday examinations, examination period ending on December 22, and 60 teaching days in the term.

5) Consider adopting a Fall Break on a trial basis for a period of 2 or 3 years. This may help with establishing a better understanding of emergent issues and challenges. We should be prepared to monitor and alter the break or return to the *status quo* if the benefits do not significantly outweigh the challenges or inconveniences.

6) Develop wellness education and awareness-building initiatives. This is to be done in conjunction with other wellness efforts on campus that inform students on how to maintain wellness, and how best to capitalize on a Fall Break.