Timetabling Policy
(January 2017)
Document History

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Version History

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Overview</th>
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<tr>
<td>0.1</td>
<td>15 August 2016</td>
<td>Draft policy for EAG feedback</td>
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<tr>
<td>0.2</td>
<td>6 September 2016</td>
<td>Draft policy for consultation</td>
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<td>0.3</td>
<td>25 October 2016</td>
<td>Draft policy including accepted comments following consultation period</td>
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<td>0.4</td>
<td>24 November 2016</td>
<td>Final draft of policy endorsed by the Timetabling Project Board</td>
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1. **Principles**

The delivery of an effective, accurate and timely academic timetable is vital to the smooth operation of the University’s teaching activity, and is integral to supporting the University as a teaching body (enshrined in the statutes of the University).

Through the implementation of this policy, the construction and delivery of the academic timetable will aim to support many of the key goals of the University’s Strategy 2026.

Therefore, this policy will be underpinned by the following principles:

1.1 The timetable will aim to facilitate the delivery of stimulating teaching in the most appropriate environments, taking account of the varied teaching and learning methods used within and across programmes and modules;

1.2 The timetable will also aim to support the University’s research aims, through assisting staff to plan their time effectively;

1.3 The construction and delivery of the timetable will be planned in order to positively support the student journey and enhance their academic experience;

1.4 Strong partnership working will be promoted between key stakeholders of this policy to ensure the timetable is built and maintained using high quality processes and accurate data.

2. **Scope of Policy**

This policy covers the planning, scheduling, adjustment and maintenance of all teaching activities on University programmes of study (undergraduate and postgraduate taught) on the main Liverpool campus, the London campus and Leahurst campus.

It does not cover any scheduled activities on distance learning programmes, or the use of University teaching space for other activities. It also does not include the scheduling of University Examinations within the designated central examination weeks.

3. **Purpose**

The purpose of this policy is to provide the framework within which an efficient and effective timetabling process can operate. This process would support staff to engage in and promote a range of teaching and learning styles, and would aim to make the best use of University systems, estates and facilities.
4. **Roles and Responsibilities**

The principle of sustained and successful partnership working will be integral to the successful delivery of the academic timetable.

It will rely on key groups understanding their roles within the timetabling process, and to fulfil the responsibilities outlined below.

The responsibilities defined in this policy are not exhaustive, and it is expected that additional responsibilities will be apparent at operational level. Refer to Appendix 2 for further details on the process and responsibilities for timetabling.

4.1 **The Timetabling Team: a centrally functioning team based within Student Administration and Support Division.**

4.1.1 Plan and co-ordinate the construction, production and maintenance of the University teaching timetable in collaboration with nominated School Timetable Contact and other faculty based colleagues; Facilities, Residential and Commercial Services (FRCS); the Disability Support Team (DST) and Computing Services Department (CSD).

4.1.2 Produce and communicate an annual timetabling plan to stakeholders of key milestones that display data collection, deadline and publishing of timetabling information for the forthcoming academic year (see appendix 2).

4.1.3 Provide user support to all timetabling contacts in the University, and to refer certain technical issues to CSD or software providers, as appropriate.

4.1.4 Maintain positive relationships with faculty based staff and to visit schools on a regular basis, as appropriate through the timetabling cycle.

4.1.5 Work closely with colleagues in FRCS and CSD to ensure the smooth operational delivery of the timetable and ensure the Online Room Catalogue is maintained.

4.1.6 Ensure timetabling reference data is up-to-date and maintained to a high quality.

4.1.7 Ensure the University estate is utilised as efficiently as possible within other timetabling constraints.

4.1.8 Provide regular management reports against key performance indicators to facilitate a culture of continuous improvement.

4.1.9 Provide an annual service level agreement to faculty based colleagues for timetabling services.
4.2 Timetable Contact(s): nominated point of contact for the Timetabling Team based in Schools.

4.2.1 Liaise with academic staff in the School to collate required timetabling data to agreed deadlines.
4.2.2 Check timetabling data, and the timetable itself throughout the year to maximise accuracy and data integrity.
4.2.3 Work closely with the Timetabling Team and Strategic Planning to manage predicted module numbers to help minimise timetable changes and to ensure optimum estate utilisation.
4.2.4 Ensure all changes to the timetable are submitted in a timely manner for the Timetabling Team to process and ensure staff and students are informed of changes to the timetable, especially during term time.

4.3 Facilities, Residential and Commercial Services Department

4.3.1 To ensure the Timetabling Team have up to date and clear information regarding the rooms, room accessibility and facilities available for teaching.
4.3.2 To work with the Timetabling Team to co-ordinate any planned works to shared teaching rooms, in order to minimise the impact on the timetable.
4.3.3 To ensure any reported faults with rooms and facilities are dealt with and resolved expeditiously.
4.3.4 To lead the Learning and Teaching Space Steering Group, which will identify areas where the estate is not sufficient to deliver a high quality timetable in order to seek continuous improvements.

4.4 Computing Service Department

4.4.1 Have responsibility for providing technical support of the timetabling software and related tools in partnership with the Timetabling Team and software providers.
4.4.2 To ensure the Timetabling Team have up to date information regarding the IT facilities available for teaching.
4.4.3 To ensure any reported faults with equipment are dealt with and resolved expeditiously.
4.4.4 To work with the Timetabling Team on modifications to improve timetabling related information and systems.

4.5 Academic teaching staff

4.5.1 Meet requests for timetabling programme and module delivery data in a timely and accurate manner, according to AQSD guidelines for module and programme approvals.
4.5.2 Staff availability must be at a level which enables the fulfilment of their teaching obligations and therefore all staff availability and constraints must be approved by the Head of School (see section 8).

Academic Staff are required to:

4.5.3 Provide information on any constraints on their availability to teach to the Head of School for consideration, as soon as they are able to (see section 8).

4.5.4 Read and check timetables as they are released, also where appropriate, consulting with externals who are responsible for delivering activities, and contact the nominated School Timetable Contact as soon as possible regarding any changes required.

4.5.5 Adhere to the latest version of the published timetable.

4.5.6 Ensure that teaching starts and finishes in a timely manner according to the agreed start and finish times.

4.5.7 Report any room or equipment problems to FRCS Helpdesk or CSD, as appropriate.

4.5.8 Help to ensure teaching spaces are returned to their standard configuration and left in a tidy condition.

4.6 Students

Students are advised to:

4.6.1 Read and regularly check their published timetable and contact their School Office in the event of:
  • A clash between teaching activities;
  • Requirement to change seminar or tutorial groups;
  • A request to consider any other specific arrangements (see section 5).

4.6.2 Adhere to the latest version of the published timetable.

4.6.3 Regularly check communication outlets (includes but not limited to: Liverpool Life, the Timetabling website, VITAL and their University email) for updates and changes.

4.6.4 Help to ensure teaching spaces are returned to their standard configuration and left in a tidy condition.

5. Equality and Diversity

The University of Liverpool is committed to promoting an environment which recognises and values people’s differences, capitalises on the strengths of those differences and supports all staff and students in maximising their potential to succeed.

In particular, the Timetabling Policy works to ensure the needs of disabled staff and students are considered as part of the timetabling process. The Head of Student
**Academic Services** is responsible for ensuring that appropriate inclusive approaches and anticipatory and individual reasonable adjustments are available to ensure that staff and students’ timetables are constructed in a manner which takes account of individual access needs. Students or staff requiring particular arrangements should be invited to make their needs known before the main scheduling period (see section 15), wherever possible, to ensure that any arrangements can be accommodated therefore minimising post-publication changes to the timetable.

In addition to the protected characteristics as defined by the Equality Act, it is recognised that those with caring responsibilities may have constraints meaning they are unable to attend activities at certain times of the day. The Timetabling Team will receive data on constraints on staff time, as approved by the Head of School.

Staff can make requests under the Flexible Working Policy (see section 8) and students can make requests via their School Office. The Timetabling Team will endeavour to find a reasonable solution to accommodate any individual requirements, before liaising with schools to find an alternative solution if needed.

**6. Teaching Weeks**

Teaching activities typically adhere to the standard teaching weeks, namely the first twelve weeks of each semester (there are exceptions to this standard delivery such as Veterinary Sciences and Medicine). The thirteenth, fourteenth and fifteenth weeks are defined as the Assessment Period. Typically the thirteenth week is designated as the first week of the Assessment Period but teaching could also be timetabled at the discretion of the Module Leader. The fourteenth and fifteenth weeks of the semester are reserved for assessment and examinations so would be used for teaching only in exceptional circumstances.

It is understood that, increasingly, some programmes follow non-standard delivery patterns. For example, some courses are block taught (i.e. all day Monday to Friday over intermittent weeks). Where possible (within the limitations of space availability), appropriate spaces will be allocated for the delivery of block teaching (single week) separate from space for activities with ‘long, thin’ week patterns (multiple weeks).

Scheduling these two ‘incompatible’ modes of delivery (‘modal incompatibility’) into the same teaching spaces necessarily produces inefficiencies in terms of room availability and utilisation. By ring-fencing portions of space for different delivery modes, it is envisaged that the constraints of teaching estate can be met more effectively.

**7. The Teaching Day**

Teaching is generally scheduled to take place between Monday and Friday 9am and 5pm, with the exception of Wednesday which is 9am to 1pm only (see section 10). Activities may be arranged for 5pm – 6pm by agreement with the organising department.
Staff and students will normally have no more than 8 hours of teaching inclusive of lunch constraints in a given day. The timetable is constructed with the aim of allowing all staff and students one hour free of teaching commitments for lunch each day, wherever possible between 12noon and 2pm, although this cannot always be guaranteed. Where teaching events are scheduled to run for several hours including across lunchtime, e.g. 9am to 4pm, staff and students must agree an appropriate opportunity for a lunch break.

Occasionally, some activities may be scheduled outside the normal teaching day (e.g. after 5pm, before 9am) in order to accommodate them within a very constrained estate and curriculum. However, this would always be done in consultation with the School or Department in question, and endeavours would be made to keep occurrences to a minimum.

Teaching activities should start on the hour and finish at ten minutes to the hour, so that students and staff have enough time to move from one activity to the next.

8. Academic Availability and Constraints

Staff members’ teaching timetables will be scheduled with the aim of providing an appropriate spread of activity over the week to allow and encourage excellent teaching and facilitate research.

The following guidelines (8a to 8g) have been developed in conjunction with the Human Resources department to ensure staff availability and constraints are approved by Heads of School in the most equitable way, and to allow teaching activities to be scheduled by the Timetabling Team efficiently.

It is expected that full-time staff are available Monday to Friday between the hours of 9am to 5pm, with one scholarship and research day per week, unless there is a formal flexible working agreement or agreed disability reasonable adjustment in place to vary this. In addition, there may be some programmes that require core teaching to take place outside of these hours. Part-time staff should follow the same principles outlined here, within their contracted working hours.

In addition, the timetabling process will aim to automatically provide the following for staff:

a. One day that is completely free from teaching per week referred to as a ‘scholarship and research day’ (this will typically be one full day but could be split over two days if preferred; staff will not be assigned a specific day unless this is approved by the Head of School)
b. One hour for a lunch break between 12 and 2pm
c. No more than four consecutive hours of teaching (except where requested)
d. No early starts (i.e. before 10am) if there is a late finish on the same day (after 5pm)
The following ‘constraints’ should be approved by Heads of Schools:

e. **Contractual hours**: if a staff member is contracted to work on a part-time basis, their working pattern should be formally agreed with Head of School. Their hours of availability should be factored into the timetabling process at the data collection stage.

f. **Approved flexible working agreements**: if a staff member has an existing flexible working agreement in place; or if they wish to change the number of hours they work, or change the time when they are required to be physically available at work (which for timetabling purposes is 9am-5pm, Monday-Friday) the member of staff should consult the Flexible Working policy. Heads of School should consider applications for flexible working in line with the University’s Flexible Working Policy. If flexible working is approved by the Head of School, the staff member’s hours of availability should be factored into the timetabling process at the data collection stage. It may be appropriate to agree such changes for a fixed duration only and that working pattern changes beyond the time limit become subject to a further application.

g. **Other requests for unavailability**: Heads of School should not typically approve requests for unavailability due to the following reasons:

   i. Distance of travel to work
   ii. Travel costs
   iii. Consultancy commitments
   iv. Time management preferences
   v. Social plans and engagements
   vi. Commitments to students at other universities

9. **Scholarship and Research time**

Staff must organise their research requirements annually with their Head of School in March so that the Timetabling Team can enter constraints prior to the scheduling process beginning.

The agreed research time (and any specified days) must be signed off by the Head of School along with other availability constraints (see section 8).

10. **Wednesday Afternoons**

Wednesday afternoons (here defined as from 1pm onwards) should normally be kept free of undergraduate and postgraduate teaching to allow for other extra-curricular activities, with the exception of teaching activities that are repeated at another time in the week.
It is recognised that some students involved in elite sport (as defined in the Policy on Flexible Arrangements for Learning and Assessment for Students with a Recognised Sporting Talent) may be unable to attend teaching prior to 1pm on Wednesdays when they are traveling long distances for away fixtures. The Timetabling Team will work with school contacts to ensure that students can fully participate in elite sport and access teaching material(s).

11. Home Clusters and Travel time between teaching activities

Teaching activities should start on the hour and finish at ten minutes to the hour, so that students and staff have enough time to move from one activity to the next.

Buildings that are in reasonable proximity to one another and the Department will be identified by the Department as a ‘Home Cluster’. Every reasonable effort will be then made to schedule activities in ‘Home Clusters’ to help reduce travel time across campus. However, it is recognised that this will not always be possible, depending on the current estate configuration (e.g. there are a limited number of lecture theatres that can accommodate activities with more than 250 students).

Where a location within the ‘Home Cluster’ is paramount and location suitability is restricted, double teaching or other alternative solutions will be suggested as appropriate.

12. Timetable Structure

The Timetabling Team will work with Schools to ensure that, wherever possible, there is an equitable timetable for staff and students depending on programme requirements.

Constraint profiles will be used to ensure that both students and staff have no more than four consecutive hours of teaching activity without a break, and are provided with an hour's lunch break, where possible.

It is understood that different cohorts of students have different expectations and preferences as to the spread of activity over the week and this should be apparent at an operational level. Every reasonable effort will be made to accommodate appropriate structure and sequencing patterns alongside the other constraints on the timetable.

13. Timetabling Methodology: order of scheduling activities

It is essential that teaching activities are analysed and prioritised for the order of scheduling to ensure the efficient and timely construction of the timetable.

University teaching activities will normally be prioritised over other types of activity for the use of shared teaching space.
Key activity properties will be analysed by the Timetabling Team, assigned relative scores and aggregated to produce a ‘complexity group’ allocation. General factors include, but are not limited to:

- Size
- Type (e.g. lecture, lab)
- Duration
- Number of weeks (see section 6)
- Single versus multi-group activities (i.e. how many alternative activities could theoretically be attended by a given student)

It is anticipated that other factors may arise and be taken into account as part of ongoing collaboration and data collection work with the Schools.

The Timetabling Team will work closely with lab managers and technicians to ensure that activities in labs are captured first, prior to the scheduling of other activities occurring.

14. Timetabling Methodology: clash management and problem resolution

In order to support the University’s rich curriculum and students’ module choices, the construction of the timetable will be based on the available module choices within agreed pathways identified prior to scheduling. Particularly complex offerings for new entry students may be constructed based on UCAS application data.

Following the publication of the draft timetable, students will be able to opt for module choices within agreed pathways which are possible based on the existing draft timetable.

Wherever possible, problems should be identified during the construction of the teaching timetable and resolved by negotiation between the affected departments with the involvement of the central Timetabling Team. Problems which cannot be resolved in this way may be referred to the Head of Student Academic Services.

15. Accessibility and supporting disabled staff and students

Activities where a student or member of staff has a disability necessitating particular arrangements and / or reasonable adjustments take priority over other scheduled activities (see section 5).

Students requiring particular arrangements should inform the Disability Support Team as soon as possible to identify any reasonable adjustments that could be made. Staff should contact their Head of Department to identify any reasonable adjustments that could be made. Information regarding building and room accessibility will be provided to students and staff via the Online Room Catalogue.
The Timetabling Team will work closely with the Disability Support Team, Health and Safety contacts, Faculty colleagues and also Facilities, Residential and Commercial Services and Computing Services Department to seek continuous improvements to operational processes to support and meet the needs of disabled staff and students within teaching and learning environments.

16. Room Utilisation

The teaching timetable is a key tool which assists in the efficient use of the University estate. 70% utilisation (HEFCE standard) should be used as a guiding principle for constructing the timetable but not to the detriment of teaching activity. It is understood that this is not always possible within estate limitations (e.g. demand on large lecture space exceeding supply).

17. Publication

The draft timetable will be available in mid-July for staff to review prior to publication to students. The ability to produce the draft timetable at this point is dependent upon data collection deadlines being met by Schools.

Timetables will then be published in advance of the start of the academic year. For the majority of programmes this will be in early September.

Rooms allocated to activities may change due to changes in student numbers, especially during the adjustment period (see appendix 2). Staff and students will receive advance notification of room changes.

Timetables for both staff and students will be made digitally available through secure University platforms. Based on student feedback and ongoing improvements, efforts will made to continue to enhance digital publication platforms, as well as other related timetable information.

Paper timetables should be avoided unless a digital timetable is unavailable.

18. Changes to the Timetable

It is recognised that multiple changes to the published timetable are often detrimental to the student experience and staff ability to teach most effectively. In principle, many changes can be avoided by the construction of a timetable based on timely and accurate data.

It is expected that a significant proportion of changes ought to be minimised through focusing on continuously improving data integrity.
However, it is also recognised that the many data sources (e.g. planned module sizes, staff availability, module approvals based on feedback, refurbishment works) upon which the construction of the timetable is reliant, are in a state of flux throughout the construction and delivery phases of the timetable.

Deadlines and processes for module approvals and evaluations should ensure adequate provision is made to capture changes in delivery patterns as early on in the planning and construction of the timetable as possible. The Timetabling Team will work with Faculties and AQSD to help ensure the necessary operational processes are in place to support this.

Changes to the timetable ought to be considered carefully, and all changes to the post draft timetable should be submitted to the Timetabling Team via the nominated School Timetable Contact through the completion of the online Timetable Change Request form. Changes should also be requested in a timely manner, to ensure staff and students affected are provided with ample notice (see Appendix 2).

19. Monitoring and Review

Key Performance Indicators have been devised, and subsequently approved by the Timetabling Project Board. These measures aim to inform continuous improvements to the timetable build processes, as well as modelling future scenarios and influencing change through management reporting. Timetabling KPIs will be reported upon and made available on an annual basis.

External benchmarking will continue to be undertaken where appropriate through involvement in national forums such as the Academic Registrars Council (ARC) Timetabling Practitioner Group, the Association of University Administrators (AUA), the Association of University Directors of Estates (AUDE), or through projects run by HEFCE, JISC or other agencies.

Appendices

1. Key Performance Indicators for Timetabling
2. Annual cycle for Timetabling
# Key Performance Indicators for Timetabling

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<tr>
<th>KPI Category</th>
<th>KPI title</th>
<th>KPI description</th>
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<tr>
<td>Convenient</td>
<td>Timely publication</td>
<td>Was the timetable delivered on time? Were key publication milestones met by all parties?</td>
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<td></td>
<td>Last minute changes / cancellations minimised</td>
<td>How many changes to the Timetable were received, what were the nature of the changes and why did the changes occur (pre &amp; post publication)?</td>
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<tr>
<td></td>
<td>Clashes resolved at key milestones</td>
<td>How many student / staff / location clashes were unresolved at key points in TT construction / publication / delivery?</td>
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<td>Proportion of activities in home cluster</td>
<td>How many activities were located within the home cluster of the department that they belong to?</td>
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<tr>
<td>Efficient</td>
<td>Room utilisation by building / activity type</td>
<td>Are the rooms for certain activity types (e.g. Lectures) and for different buildings being used efficiently?</td>
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<td>Observed versus planned frequency</td>
<td>Are rooms in active use when they are booked? I.e. does the timetable correlate with reality?</td>
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<td>Time taken to build the timetable</td>
<td>How long does it take to create the timetable each year?</td>
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<td>Balanced</td>
<td>'No hanging around'</td>
<td>How many staff / students have long free periods between morning and afternoon activities</td>
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<td>Time free of teaching for research and scholarship (staff only)</td>
<td>How many staff have protected time free of teaching each week</td>
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<td></td>
<td>'Make it worthwhile'</td>
<td>How many staff / students have to come in for just one activity each day</td>
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<td>Rest breaks</td>
<td>How many staff / students have a rest break each day</td>
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### Timetabling Team: Annual Cycle

#### Maintenance of active year’s Timetable

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<th>Planning</th>
<th>Scheduling</th>
<th>Adjustment</th>
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<td>September</td>
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#### Key Deadlines

- **Phase 1:** Review
  - Data Collection and Preparation: All data received from all schools
  - Construction: Activities and constraints built
  - Data Validation & Scheduling: Timetable scheduling complete

- **Phase 2:** Key Deadlines
  - Submission of all TT adjustments (Sem 1) via online form
  - Construction deadline: activities and constraints built
  - Data Validation & Scheduling: Timetable scheduling complete

- **Phase 3:** Key Deadlines
  - Submission of all TT adjustments (Sem 2) via online form
  - Construction deadline: activities and constraints built
  - Data Validation & Scheduling: Timetable scheduling complete

#### Review

**Objectives:**
- TT to meet with schools and other key stakeholders to review TT successes and identify process improvements for future phases
- TT to conduct thorough data analysis to produce and publish KPIs report for previous academic year
- TT to conduct thorough data analysis to produce interim KPI report for active academic year in order to target improvements proactively
- TT to meet with other key stakeholders such as FRCS and CSD to identify improvements to systems, processes and data exchanges for future phases

#### Data Collection and Preparation

**Objectives:**
- Schools to collate and submit accurate core data to TT
  - 2 Staff availability (HoS approved)
  - 2 Module Delivery proformas (inc module sizes & allocation rules)
  - 3 Home Cluster information
  - 4 Predicted programme pathways
  - Any changes to departmental teaching rooms
  - TT to meet with Lab teams to obtain central labs timetable for input
  - TT to liaise with Schools re: any non-teaching activities to appear on TT
  - The activities central to this phase would be supported by regular face to face visits / meetings between Schools and TT
  - TT liaise with CSD re: database rollover

#### Construction

**Objectives:**
- TT to use collected data to:
  - 1 Input module requirements and build teaching activities in TT system
  - 2 Update TT system reference data (locations, equipment, suitabilities)
  - 3 Build, validate and apply constraints (staff availability)
  - Schools to update and verify programme structures in SPIDER
  - Schools to update module data screens in SPIDER
  - TT to obtain Module size predictions from strategic planning for comparison with predictions from School
  - TT to liaise with School re: any non-teaching activities to appear on TT
  - TT liaise with CSD re: any discrepancies with School
  - TT liaise with CSD re: any SPIDER to Sploshed integration improvements
  - CSD to test any changes

#### Data Validation & Scheduling

**Objectives:**
- TT to allocate continuing students and Y1 pathways to activities
- TT to use UCAS application data to generate Honours Select cluster grid
- TT to run data validation checks and query any anomalies with Schools
- TT to prioritise and resolve clashes
- TT to schedule activities, starting with large lectures
- Schools to provide Welcome Week timetable requirements to TT
- TT to publish draft timetable to Schools

#### Adjustment & Clearing

**Objectives:**
- TT to review and modify KPIs for future phases
- TT to meet with schools and other key stakeholders to review TT successes and identify process improvements for future phases
- TT to process ongoing requests for ad hoc bookings, out of hours bookings, non-personalised academic timetables
- TT to continue to update communication outlets (e.g. website) within agreed parameters
- TT to maintain online room catalogue and timetable reference data in collaboration with stakeholders
- TT to continue to update communication outlets (e.g. website) with latest advice and guidance
- Schools to triage any initial staff or student timetabling enquiry, escalating to TT where appropriate

#### Key:
- **TT:** Timetabling Team
- **SC:** Schools
- **CSD:** Computer Services Department
- **FRCS:** Facilities, Residences and Commercial Services