Flexible & Remote Options
for Winter 2022 Courses

TO WHOM IT MAY CONCERN,

The Waterloo Undergraduate Student Association (WUSA) serves as an advocate for undergraduate students to receive accessible, accountable, and high-quality educational experiences at the University of Waterloo.

Introduction

WUSA has received formal complaints and feedback that highlight the ableism involved in a "return to normal" that was insufficient prior to the pandemic and continues to fail to meet the access needs of learners. They have noted how *remote* options for learning have improved their ability to access and engage with courses. These students are now facing the removal of those enabling options, leaving a considerably smaller set of courses available to them. This presents the difficult choice between delaying their graduation or compromising their health.

We have a responsibility to advocate for consideration of the diversity of our undergraduate population. Students who are immunosuppressed, who live with medically vulnerable people, who provide services in high-risk settings, who have household members unable to be vaccinated, and who engage in caregiving roles, are all parts of our community. They have legitimate and serious needs that may not necessarily considered "disabilities" or accommodated by AccessAbility Services. They should not need to disclose personal details of their life or plead for compassionate circumstances to learn and study safely. These considerations are also not limited to undergraduates; some of our faculty, staff, and graduate students also fall into these and other vulnerable groups.

The pandemic is not over

Even with safe and effective vaccination, the impacts of the pandemic continue – many people have experienced significant financial precarity and negative impacts on their mental and physical wellbeing. These groups are ignored in policies that prioritize a "return to normal" over recognition of these highly abnormal and difficult circumstances. These changes have more significant impacts on students who are currently living outside Kitchener-Waterloo or have other ongoing commitments and constraints as a result of the pandemic. (As discussed in other WUSA reports, access to affordable housing remains a significant barrier.) Students need clear, consistent, and directly communicated plans provided well in advance.

It is also incumbent upon as members of the broader Kitchener-Waterloo community to minimize the creation of additional burdens upon our healthcare systems. It is incredibly important to ensure people do not feel pressure to come to campus when ill, or put off receiving COVID-19 testing and screening for fear of losing income or learning opportunities. **A return to pre-pandemic levels of in-person instruction without adequate consideration** of these students' needs puts our health and learning goals in tension with each other. It

is unfair and unjust to force our community to decide between managing their own COVID-19 exposure risks and risks of exposing others, or receiving full educational opportunities and employment.

Students need remote access

Beyond COVID-19 considerations, it is good practice to not require only face-to-face interaction to reduce the risk of people coming to class sick, infecting others or worsening their own health. Beyond only disabled students, international students and those who live or work with high-risk or medically vulnerable populations may not be able to attend in-person courses. Students who need remote and flexible options in order to complete their degrees on time should be enabled to do so at the University of Waterloo, rather than being forced to delay their progression or take courses from other institutions which may or may not transfer into credits at the University of Waterloo. **As per Policy 34, "the health and safety of individuals is of the utmost concern in every area of University operations." The central purpose of our proposed practices is to prioritize the health and safety of the entire University of Waterloo community.**

Improved options for remote learning increase access for many, though is not necessarily ideal for all. Students whose courses involve significant oral communication or sensorimotor engagement report feeling less prepared for later hands-on work, lab procedures, or face-to-face modes of demonstrating their learning. We also note that remote learning requires stable internet access and reliable devices on which to access a learning management system and course materials, which is not necessarily a given for all students.

Instructors need adequate support

These recommendations aim to be realistic about ongoing pandemic considerations and the time and energy continued adaptation requires of people in instructional and support roles. Only with sufficient awareness and involvement from across the University can we create inclusive and just policies and practices. Instructors require clear expectations regarding their responsibilities, and the tasks required of them to meet those responsibilities. This document should provide clear expectations and relatively simple means for instructors to meet said expectations; however, additional responsibilities cannot be added to someone's role without taking away something of similar effort. Instructors, especially tenure-track faculty, are under significant pressure to "return to normal" levels of productivity. The pandemic is ongoing, and thus so are associated stresses, responsibilities, vulnerabilities, and mental loads.

Please don't abandon your investments into accessibility

Due to the pandemic, many courses now have well-prepared materials and resources for online offerings. The Centre for Teaching Excellence and the Keep Learning team have developed hundreds of tipsheets, self-guided courses, workshops, and other resources to

strengthen the uptake of educational innovations in remote course offerings. The University of Waterloo has been a leader in these innovations and investments in accommodating for the circumstances of the ongoing pandemic, and as a result has vastly improved the accessibility of course offerings for disabled students and other underserved populations. A "return to normal" should not be a return to inaccessibility, discarding all those gains and investments and once again sidelining the needs of disabled, international, remote, and other students who benefit from remote access options.

We look forward to discussing these recommendations and other concerns raised by undergraduate students regarding a shift in the availability of remote learning for the upcoming Winter 2022 term. Please feel free to reach out to continue this discussion as we collaborate to prioritize issues of health, equity, and learning for our University of Waterloo community.

Warmest regards,

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INTRODUCTORY REMARKS

This document has been created with primary leadership and input from disabled students at the University of Waterloo, including WUSA's Committee on Access & Disability, aligned with the disability justice motto of "Nothing about us without us." Throughout this process, we have additionally consulted with and integrated the feedback of diverse stakeholders, including the Keep Learning team, the Faculty Association, and the Equity Office. In this document and our advocacy, we seek to balance the needs of students and the limitations faced by those in instructional and support roles. No single solution will provide universal accessibility and meet the needs of every person in a given space; however, these are designed to maximize accessibility and retain the gains of remote learning as we continue into the Winter 2022 term.

This document's recommendations constitute neither accommodations nor accessibility features, both of which imply some degree of intentionality on the part of the instructors/designers. They are aimed primarily at the *modalities* involved in flexible and remote course delivery, not the specific *pedagogical orientations* instructors may use. These can be considered natural *affordances* that lead (disabled and other) learners and instructors to interact with courses and their features in ways that make space for a diversity of learners and their capabilities (including, but not limited to, disability).

Requiring disabled people to disclose vulnerabilities in an attempt to have their access needs met will undoubtedly result in many students' needs going unmet, especially as we recognize the many ways in which people are experiencing precarity in these times. Over **40% of undergraduate students** at the University of Waterloo in 2019 identified disabilities that impact their academic or social functioning on a day-to-day basis. AccessAbility Services serves around 2,000 students, **or about 5% of the student population.** [Students remain unregistered for many reasons](), including process barriers, healthcare biases, diagnosis costs, and stigma regarding disability. There is a very significant set of students whose needs are not met by individual or ad-hoc solutions. They need their potential access needs foregrounded, not considered only as an afterthought. None of the recommendations included here interfere with accommodations provided by AccessAbility Services but rather expand some of their benefits to all students.

GLOSSARY/KEY TERMS

For the purposes of this document, we wish to use terms as precisely as possible to avoid ambiguity, uncertainty, or vagueness. The below terms may refer to an entire course, but more frequently, specific elements of that course.

Instructor
> Refers to the person(s) listed as Instructor as per the Schedule of Classes, and does not denote any particular rank. May include, but is not limited to, adjunct or sessional lecturers, graduate students, faculty members, visiting professors, and support staff.

Learning Management System (LMS), also known as Content or Course Management System (CMS)
> An online platform through which a syllabus, readings, assignment directions, and other course materials are distributed. The University of Waterloo uses Learn as our LMS. A LMS often also includes features like discussion boards for posts, threads, and replies; dropboxes to upload and submit assignments, and quiz features to administer multiple choice and other forms of assessment. Usually, the primary hub for instructors and students to connect around a course.

Engagement
> Rather than considering solely (synchronous) attendance and participation, we instead refer to engagement when attempting to capture learner involvement in various aspects of a course, such as asking questions, building on peers' contributions, and making connections between course content and outside learning/experiences.

Mode(s) of delivery/instruction
> The following terms refer to the mode of a course. When and where in time and space is a course offering situated? How do learners and instructors engage with it? It should be noted that a course's mode does not necessarily imply or restrict any form of pedagogical approach to teaching and learning.

Synchronous
> Components of a course are synchronous if they are experienced at the same time for all learners (and instructors). Single-section face-to-face or livestreamed courses are usually synchronous, as are most oral presentations and timed final exams.

Asynchronous

Components of a course are asynchronous if they are not necessarily experienced at the same time for all learners (and instructors). Students usually complete readings asynchronously, on their own schedules, along with most written submissions.

In-person modes, also known as face-to-face (F2F) modes

A mode of course delivery, instruction, or engagement where learners and instructors come together in the same physical space.

Online modes

A mode of course delivery, instruction, or engagement that occurs through online-mediated modalities. Online usually refers to courses that were intentionally designed for online modalities; compare remote below.

Remote:

A term used to describe courses using online modalities by necessity rather than courses that are intentionally designed for online modalities (online). Remote also refers to modes of access or delivery that are not in-person.

Blended

A course is blended when the instructor (or designer) chooses before-the-fact what learning activities will occur in-person and what will occur online. Attendance at in-person and online sessions (usually consecutively) is required for the full learning experience – neither substitutes for the other.

Flexible

A flexible course is one in which learners have the option to choose in-person or online modes of engagement, and change their choice class-by-class (or similarly) with no penalties or deficits in their learning, achievement, or outcomes.

CONTENTS

OVERARCHING PRINCIPLES

The following principles, while not exhaustive, provide guidelines on the needs of learners regarding access to and within learning experiences.

EQUITABLE EXPERIENCES

In-person and online modes of learning are not expected to be precisely equivalent. However, learners must not be denied opportunities based on their selected mode of learning. **No information should be exclusive** to one mode of delivery. **There should be reasonable equivalents for modality-specific learning activities and assessments.** Where reasonable equivalents are not immediately clear (e.g., working with specialized equipment in labs, site visits), consult with your Department or Faculty regarding what alternatives might be available that conform with accreditation and other degree requirements. If essential course requirements include in-person experiences, make that known at the beginning of the course so affected students have adequate time to choose another course. Where possible, provide multiple dates for in-person, synchronous appointments, and allow students to sign up for the timeslots that work for them.

For example, if a course component includes in-class quizzes, those quizzes must also be made available in the online mode. It is acceptable to vary the questions between in-person and online modes of delivery to avoid sharing of content or answers, so long as one is not made intentionally easier or harder than another.

FLEXIBLE DELIVERY

Students should be able to access the content of each class remotely and in a timely fashion without making specific or advance requests for access. Students with disabilities make up over 40% of the undergraduate population at the University of Waterloo, yet only about 5% are registered with AccessAbility Services. Amid the pandemic, there are even greater reasons to be concerned about equitable remote access; students may need to miss class due to illness, a positive COVID-19 test, family crises, disability flare-ups, urgent caretaking responsibilities, or many other reasons. The role of an instructor is not to adjudicate the validity of these circumstances, it is to provide environments in which all students can learn effectively regardless of their circumstances.

Just as we don't want students showing up sick and recognize that they have other life constraints, the same principle applies for instructional roles. Instructors also require reasonable accommodations for their needs that may include different forms of course delivery. If instructors experience immediate needs for remote delivery options (e.g., a positive COVID-19 test result), they should be provided with the means to postpone classes or deliver them remotely as they are able. Instructors should not be required to disclose the particular circumstances resulting in their needs to their direct peers or supervisors; verification can be conducted by Occupational Health and Wellness or HREI, as appropriate.

Flexibility in course access and delivery also improves students' adaptability to various technologies they may encounter in their careers and professional development, providing opportunities to build

highly desirable "soft skills". Access should be provided to all as a matter of course, minimizing the need for individuals to disclose personal information or the University to assess piles of highly time-sensitive documentation.

LEARNER MOTIVATION AND AGENCY

Learners do best when they are motivated to succeed, regardless of the mode through which they access learning experiences. At the start of the course, invite learners to express what they value from the course, what they hope to achieve, and their motivations, aspirations, hesitations, or trepidations. Take an interest in their interests – are there topics they're looking forward to? Connections they're beginning to draw between course material and their lives? These kinds of questions enable you to better engage students. See CTE's Early Engagement Quick Tips for more information.

When providing "Getting to know you" sharing opportunities, ensure you separate critical information and camaraderie-building. Critical personal information should be provided to the instructor via private channels (e.g., surveys in Learn). Learner-to-learner connections should be via more open channels (e.g., check-in questions, intro posts in discussion boards). Use both sets of information to tweak how you present various topics, integrate real-world examples, and show how students' learning activities will prepare them for their aspirations!

Giving learners autonomy, such as in choosing topics, presenting cases/applications, or teaching their peers, can greatly increase their buy-in. You might find it easier to find out your students' goals and explicitly state how each class will help them reach those goals. Consider soliciting mid-term feedback, even in a form as simple as start/stop/continue. While you might not take their suggestions outright, responding to overall trends can help them feel heard, included, and improve engagement and receptivity on both sides.

PERCEPTIBLE INFORMATION

COURSE MATERIALS AND USE OF LMS

Briefly, we recommend the following:
- All content on the LMS (Learning Management System, e.g., Learn) should abide by accessible document guidelines.
- All syllabi, assignment directions, and course readings must be available in **accessible formats** at the beginning of the course and updated if changes occur.
- Any lecture notes, slide decks, handouts, or other in-class materials should be posted in accessible formats as soon in advance of a class as they are ready.
- Provide alternatives to any content that exceeds 200MB in size; consider removing images or lowering quality to decrease file sizes.
- Recordings of in-person content should be provided on the LMS as promptly as possible; ideally, within 24 hours of the class time.
- The University should consider hiring for educational technology support roles such as the previous Online Learning Assistants (OLAs) and Course and Technology Support Assistants

(CTSAs) in line with other post-secondary institutions, such as Queen's University's Student EdTech and Captioning Teams.

CLEARLY COMMUNICATED EXPECTATIONS

All learners benefit from clear expectations available in a central location in their most authoritative form, but this is especially important where communication may be split over time. **Information regarding assignments, grading, deadlines, engagement, and other guidelines of key importance must be centrally available and well-organized within the syllabus**, or linked to in another document from the syllabus. Such information should be available **within the first week of classes**. If changes or updates are made, they should be updated in the authoritative centralized copy and students should be informed via email in addition to any announcements on the Learning Management System or in class. **Courses should inform students the extent to which flexibility will be made available at the start of class**; only providing that information later into the term disadvantages students who may have benefitted from that access but dropped out before it was made available.

For example, a student looking to determine when the first essay assignment is due and how to hand it in should find the most up-to-date information about deadlines and percent of final grade within the syllabus. The assignment directions may be linked as a separate document if clearly indicated. If any changes have been made, learners should also receive an email with that information, but the most recent copy in the LMS should be updated to reflect that.

DOCUMENT ACCESSIBILITY

Learners differ in what modes of information are accessible to them. Ensuring all information is *perceptible* does not simply mean critical information is uploaded to the LMS in screen reader friendly formats, though this is a necessary baseline standard: see CTE's tipsheets on accessible Word and PowerPoint files, and WebAIM on web content. Any information should be represented in multiple forms in a **timely** manner, such that those who require access in forms different from the original are not left behind. Consider using a screen reader to test basic accessibility, such as NVDA (Windows), TalkBack (Android), or VoiceOver (Mac or iOS). Preview content on both landscape computer screens and smaller mobile screens to ensure readability and clear indication of important content in all modes.

AUDITORY INFORMATION, TRANSCRIPTS

Audio can be an engaging and humanizing tool for instruction, particularly where face-to-face interaction is limited; however, it can produce barriers for learners who are deaf, hard of hearing, or experience functional limitations around continually processing auditory information. If used, audio files should permit users to pause, reverse, and fast-forward as desired, and should come out of both the left and right tracks. **Enable captioning** for any synchronous content and **make transcripts available** in plain text formats (.txt) on the LMS as soon as possible (and immediately when posting pre-recorded audio content). Many podcasts, TED Talks, and scholarly audio sources also provide transcripts – reach out to creators if you're having difficulty finding them.

Automatic captioning and transcription services are a useful tool; however, they can frequently be inaccurate, especially when jargon or academic terms are used. Microsoft Teams offers automatic captioning to all users, while Zoom requires the host to enable transcription each session. Automated may be used as a first pass, particularly if already calibrated to an instructor's voice, but we strongly recommend **manual edits and review of auto-generated transcripts.** For further details, see this UW resource regarding automatic captioning services, and this CTE resource regarding best practices in transcription.

VISUAL INFORMATION, ALT TEXT

Visual content (including what is shown on blackboards/whiteboards during class) should be written out and included with class-specific materials (likely within the transcript). **If it is not possible to write out in plain text** (e.g., diagrams, specific notation), **include a photograph with appropriate alt text describing its content.** The following tipsheet provides guidelines for alt text of visual content in various contexts: https://accessibility.huit.harvard.edu/describe-content-images

Especially for **diagram- or equation-heavy courses,** if instructors already have their notes prepared, scan these notes at high resolution and share them online in advance of the class, as would be appropriate with slide decks. This not only aids students taking remote options and your support staff, but also students in-class who may be partially sighted/have low vision, experience functional limitations regarding orthography/manual dexterity, or are physically distanced from peers and further from the board than ideal.

Video recordings are *optional* but not required *unless* there is significant information communicated only through visual mediums **that cannot be replicated otherwise.** Note that video recordings involve **much higher file sizes,** making them less accessible to people without unlimited or consistent internet access. Recording tools must be able to **resolve the relevant visual information with appropriate clarity.** It is far more difficult to magnify images captured on video – carefully consider whether still photos or transcription would better meet student needs.

FILE SIZES

It is important to note that students may experience slow or unreliable access to internet or technologies compatible with the LMS. Recordings should be made available to be directly downloaded in a small file size. **Split large files into smaller ones, considering the** principle of chunking or segmenting **to make each section meaningful.**

Generally, audio should be uploaded to the LMS in the .mp3 file format. If you embed audio files into your presentations, such as PowerPoint files, also provide versions of the audio track and PowerPoint visuals separately. Large files can take a long period of time to download, and for those with unstable internet, they may have to repeat the entire download multiple times for it to be completed successfully.

CLASSES

FLEXIBLE ACCESS

There are numerous reasons a student may not be able to attend a given in-person class, including illness (COVID-19 or otherwise), transportation difficulties, childcare arrangements, and more. Many limitations may occur without significant notice. **Learners must be able to access the course content with** *flexibility*, **meaning they are not required to disclose the nature of their barriers or difficulties at all nor provide notice in advance of a class.** Students should be able to access any session of the course remotely in a timely manner. This also means activities that are designed to be run synchronously consider redundancies for a smaller set of synchronously engaged students.

<u>For example</u>, if student discussion is a key component of learning experiences in a course, opportunity for discussion should be available both in face-to-face modes and online modes. Students must not be penalized for non-**attendance**.

CLASS CONTENT

Particularly important is the issue of direct lecture content. Some instructors prepare comprehensive slide decks and notes in advance of classes; others may use whiteboards and direct their instruction based on synchronous learner feedback; still others may integrate varied activities. **Any and all information communicated during in-person classes should be made available in appropriate formats within 24 hours of the class time.** Communicate with your assigned group of support staff to ensure this standard can be met.

ASSESSMENTS

PRESENTATION-BASED ASSESSMENTS

Notes regarding assessments wherein a major graded component is regarding skilled delivery, engagement with audience, and/or ready responses to unexpected questions. Before requiring in-person presentation-based assessments, consider the original goals of these assessments: connecting students with their peers? Receiving in-the-moment feedback? Professional oral communication?

If sharing information other learners is more important than the mode of delivery, allow creative, unexpected, and less-polished means of presenting information, including asynchronous ones (e.g., poster displays, podcasts, interactive text-based games). Make clear in your assignment directions, rubrics, and feedback guidelines the extent to which the **quality of communication** or visual display is factored into their grade. Unless a course's learning outcomes include professional or creative communication, avoid making this a large portion of the grade to minimize additional grading burdens and misalignment between activities, assessment, and grading.

If real-time feedback from peers is most important, make part of the grade for all students partially dependent upon providing sufficient feedback to a few presenters. **Assign each student their target presenters** so that each presenter receives relatively similar amounts of feedback. It is often easiest to

grade the quality of feedback on a check/plus/minus basis to save yourself a grading load of each student times 3 or 5. A simple way to handle such information is a check-system, as described in "Multiple Submissions"; a "check-plus" or "check-minus" may correspond to gaining or docking 5-10 percentage points from a student's submission. Assessments may build on the feedback received, such as through a "Revise & Resubmit" process and accompanying letter that indicates how the students have responded to their peers' feedback and improved their original submission.

If articulate communication and responses on-the-fly are central to the assessment, presentations should likely remain synchronous. Note that remote, synchronous modes of presentation are certainly possible (as examples, see the many Zoom Defenses and PhDs granted since 2020, as well as conference practices in your field). Ask students their preferred means of presenting, make remote options available, and provide opportunities for students to practice using any necessary technology in advance of their presentation date and time.

LARGE ASSESSMENTS
Scaffolding for large projects, especially those with immovable deadlines
Recall that most undergraduate students do not have the expertise, past experiences, or task management skills to effectively structure large projects over long periods of time. (The obvious exception would be design and project-based courses, where project management skills are a key learning objective.) A final project without *scaffolding* (supports and checkpoints that structure the process of its creation) may result in assessing someone's ability to predict the scope of a project, manage outside obligations, or produce clean-looking documents after an all-nighter, rather than providing opportunities to demonstrate and deepen their learning in a particular area of interest. It is important to check in with all students about their progress through large projects.

Splitting large submissions into smaller process pieces provides more opportunities for feedback, avoids someone thinking through, researching, and writing all at once (and usually not editing), and allows grading to be very precise about elements such as relevance to course content, use of scholarly sources, organizing ideas/structuring arguments, and professional communication styles. In addition, inconsistent project pieces, such as different topics or writing styles across a research question, source annotations, and draft submissions, may flag potential academic integrity violations.

For large projects, especially those with "hard" deadlines (e.g., due to a peer feedback process), suggested checkpoints include proposals, annotated bibliographies, outlines, rough or polished first drafts, and final drafts. Specific instructions regarding the processes involved at each stage, the expected number/provenance of reference materials, and strong proposal examples can all assist in these processes. Students may benefit from other opportunities to practice elements of a project; e.g., generating research questions, writing smaller lab reports, or critiquing published articles.

OPEN-BOOK, TIME-UNLIMITED TESTING
As a replacement to proctored, closed-book, time-limited testing
Time-limited testing primarily assesses *performance on tests*, not actual learning. Make your assessments align with your learning activities! **Tests should be considered time-unlimited and**

open-book by default. Every security or proctoring system has flaws and ways around it, both low-tech and high-tech. It is important to assess parts of Bloom's Taxonomy other than recognition and recall; or, put another way, **what could be answered with an online search** or "Find" command in course materials. For specific advice, see the Centre for Teaching Excellence's tip sheets for transitioning to Online Exams and Take-Home Exams.

If your assessments rely on existing question banks (such as those provided by textbook publishers) or re-use questions across years, **try pasting your questions into a search engine** and see what results appear. It may be worthwhile to check Course Hero, alongside Quizlet and alternatives such as [your course code] "test bank". If you find your assessments available online and do not have the time to change them entirely, change the wording of the question where possible to make them less easily searchable.

If your assessments involve solving equations, ensure that students are **required to do some interpretation** of the question and/or results. It should not be possible for someone with very little knowledge of the course to enter questions into Desmos or Wolfram Alpha, copy-paste the answer in, and receive a correct answer. (Try this yourself!)

If you are using multiple choice questions, ensure your pool of questions is larger than the number of questions any assessment will include, randomize the sets of questions (and, where possible, the answer order), and vary the structure and wording of questions to minimize the likelihood of students being able to share answers. Even if an entire assessment can be marked automatically, ensure you do not release marks until everyone has completed their assessment.

TIME-LIMITED ASSESSMENTS

The Undergraduate Calendar stipulates that tests other than final examinations must be held during the Formal Lecture Period of 8:30AM to 10PM Waterloo time, Monday through Friday, with few exceptions as approved by the appropriate Associate Dean. The date and time of any time-limited assessment must be included in the syllabus or course outline and provided within the first week of classes. These dates cannot subsequently be changed without **unanimous** consent from students. Instructors are responsible for providing mutually agreeable times for students to engage in time-limited assessments.

When an assessment **must** take place during a limited period of time, such as for midterm tests, ensure the window for taking the test extends over **at least 48 consecutive hours.** Students may have fluctuating or unpredictable responsibilities, such as employment or care work, or be located somewhere other than the EST/EDT time zone.

Students may have unstable or limited internet connections. Ensure your test **minimizes use of content with large file sizes**, such as video or high-resolution images. Consider breaking up your test across multiple "pages" to decrease the internet and memory load required. Accessible document requirements apply to assessments alongside other course materials.

COLLABORATION

Fostering good collaboration is difficult even in the easiest of circumstances! Poorly-managed collaborations can easily result in unbalanced work distributions, destructive conflicts, and unmet learning objectives.

Where collaborations are required, ensure **students begin with developing norms and expectations within their groups**, clarifying their modes of communication and expected timelines, and have opportunities to provide feedback and reflect on their own and their peers' performance. Request frequent individual and group check-ins regarding not just progress on deliverables but group dynamics and members' varying levels of contributions. Provide clear methods for dispute resolution within your syllabus and accompanying materials. Consider your intended course of action if problems are persistent or conflict between students becomes intractable, or if some group members are judged to have contributed far less or far more than others – alternate activities may be called for. If you intend to offer an option of unequally distributing grades across group members, make that explicit before the beginning of the group work.

For additional and specific tips regarding collaborations, see the linked paper, Turning Student Groups into Effective Teams, Oakley et al., 2004.

COURSE POLICIES

COMPASSIONATE POLICIES

In recognition of the many additional stresses, commitments, and needs for flexibility, we strongly endorse compassionate policies that provide basic understanding and tolerance for students who, for whatever reason, are unable to complete every assignment to the best of their ability within the predetermined schedule.

It should be understood by instructors, staff, and students that **compassionate policies such as the ones listed here do not provide "unfair advantages" or reduce the rigor of a course**; instead, they level the playing field between those who have consistent schedules and those who do not and improve the ability of all students to demonstrate the full scope of their learning, not merely how well they can perform under time-limited conditions. So-called "compassionate policies" are also useful in decreasing the likelihood of cheating or other academic integrity violations by making space and opportunities for struggling students to seek support. Applying such policies universally removes the need for students to disclose their particular circumstances and removes the instructor from a gatekeeping role wherein they must assess the believability of each claim.

The following policies and approaches may not be perfectly suitable to your course – consider their key principles and adapt as is useful.

ENGAGEMENT

Marks for perfect attendance incentivise students to come to class while sick, punish those who are unable or unwilling to meet those standards, and do not necessarily improve actual engagement with peers, instructors, or advance discussion on the content of a course.

Traditional in-class participation favours those who are ready to raise their hand or interject and pushes out students who may require more time to think, formulate their thoughts, and communicate with others, which may or may not be due to disability. It also disadvantages equity-deserving students who may have experienced being alienated, ignored, or made to feel unsafe in classrooms.

Engagement policies should provide clear expectations for appropriate contributions in-person and online, synchronously and asynchronously. Beyond asking questions and responding to prompts, aim to facilitate open and respectful conversations – link to current events or other interests of students, as appropriate. **Also consider inviting forms of engagement beyond discussions**, such as collaborative notetaking, sharing study materials, and providing peer feedback.

Depending on the importance of engagement to students' overall performance in a class, it may be worthwhile to request **students self-evaluate their engagement around halfway through the course** to provide a check-in and opportunity to correct assumptions. Clear expectations and rubrics are especially valuable in such circumstances. Consider whether students have expressed surprise or disappointment at their marks for engagement in the past, or if you've noticed lesser engagement in later weeks of your course.

LATE POLICIES

Punitive late policies, such as taking 5 percentage points off the final mark for each 24-hour period an assignment is late, do not result in better time management but instead punish students who cannot, for whatever reason, submit their assignment on time.

We suggest a policy of **grace days**: students may apply up to (for example) 5 grace days to push back the deadlines for large projects, without penalty and without requesting permission. Unused grace days do not result in any benefit to their mark. Students do not need to inform the instructor before using grace days – application should be automatic. If a student has exhausted their grace days, it may be appropriate to reach out and start a conversation with them regarding plans for future assessments and any ways to support – see Scaffolding Projects.

MULTIPLE SUBMISSIONS

There is great value in pre- or post-class engagement opportunities such as check-in/check-out questions, reading quizzes, and reflections. However, it may be unfeasible for some students to consistently complete such opportunities to the best of their ability each week. **Policies that permit**

multiple submissions or provide more opportunities than grades can reduce the stress students may feel to perform perfectly on each submission.

Where multiple submissions are in use, a check-based system for grading may be expedient and reduce the grading load. Rather than providing detailed feedback on each submission, grades may be assigned per the following: check: meeting expectations, check-plus: exceeding expectations, check-minus: slightly lacking, x: significantly lacking or misunderstood assignment, and 0: absent. This policy can be made consistent with a requirement to *complete and submit* each assignment, even if the achievement level is not particularly high for all of them, to ensure students have at least attempted each part of the course.

For example, if you require a reflection on at least one reading each week, consider including syllabus language about grading such as "your top 8 best scores will be counted towards your grade." Wording these policies as keeping the *top* scores, rather than dropping the bottom scores, helps frame this as an opportunity for improvement rather than a way to "get away with" skipping or not putting work into various assessments. Various grade book software, Excel, and LMS platforms provide automated ways of updating an overall mark.

WEIGHTING GRADED ITEMS

Everyone has bad days, and this is especially true as the pandemic and its many impacts continue. Shorter and more frequent assessments throughout the duration of the course, as opposed to very few cumulative assessments, provide greater opportunities for students to demonstrate learning, instructors to provide specific feedback that learners can benefit from, and can more precisely target sets of skills or learning outcomes. As much as possible, standalone assessments should not have a grade weight of over 30%. Around 10%-25% per assignment reduces student stress and provides a more accurate picture of a student's learning overall, rather than in a few specific instances. When determining the weight of various course components, consider how large a factor you intend the activities of that component to be in the overall learning process.

TIMING DEADLINES

When setting the time component of deadlines, consider when you expect your students to be doing their best work. If your students are primarily taking courses online, you may want to consider the time zones where they live. There's no harm in asking students for their preferences! Regardless, ensure as often as possible that the *timing* of deadlines is consistent across assignments (i.e., all assignments should be due at the same *time* on their various dates, not one at 2PM, another at 8AM, another at 9:30PM). Avoid making deadlines "12:00" (AM or PM); there will always be some students confused about the timing. If aiming for midnight deadlines, use 11:55PM (with a few minutes' grace period) instead.

PRINCIPLES FOR INSTRUCTOR NEEDS

EQUITY CONSIDERATIONS

We recognize that changing to online modes of instruction involves increased labour. This disproportionately impacts adjunct and precarious workers in academia, scholars of colour, and otherwise marginalized people in instructional and support roles. Of these groups, many are not provided significant notice regarding their teaching commitments, are less empowered to push back against unfair or unsafe situations, and are more dependent upon contract renewals. Treating those in instructional roles as fungible is not beneficial for instructors, support staff, or students. Through these recommendations, we aim to provide solutions that meet access needs without placing significant burdens upon those most proximal to courses. We hope these strategies will minimize additional effort and investment of time, energy, and expertise; instead distributing the work across additional support roles.

WORKLOAD SUPPORTS

Pausing the "tenure clock" is great, and should be provided universally without need for disclosure of particular circumstances. However, this is not sufficient. The circumstances of an ongoing pandemic increase everyone's background anxiety and cognitive load. These effects are especially significant for people in charge of household management, childcare, and caregiving responsibilities. They are also especially significant for marginalized folks, who often are made de facto responsible for being "the equity voice" in meetings, providing additional mentorship to marginalized students, and lack the same kind of community and understanding that their colleagues may have. These considerations exist alongside the proliferation of equity and anti-racism working groups, committees, and hiring panels that – while incredibly important – have often added to the responsibilities of equity-deserving staff and faculty members.

Many of the recommendations in here are beyond the scope of awareness or job descriptions for many people who take on instructional roles. It is thus even more important that this document and associated supports meet instructors where they are and bolster their capacities to make crucial changes.

TECHNOLOGY SUPPORTS

Significant technological skills, familiarity, and specific training are required to effectively use given tools and make courses available remotely. Especially during a pandemic, instructors cannot be expected to independently develop these skills. Resources like iReCoDE offered by CTE are available, but require time commitment to engage with.

Just as faculties hired co-op and part-time students to provide support in the emergency pivots to remote delivery in Winter and Spring 2020, the University of Waterloo should similarly invest in student support and assistant roles to ensure accessibility and flexibility of courses offered in Winter 2022 and beyond.

The centralized training of the OLAs and CTSAs was effective overall, and similar centrally-provided training regarding accessible course materials, audio recording and transcription, and technological support would be reasonable and beneficial for the preparation and usefulness of students in similar roles. Similar rates of compensation and expected hours are likely reasonable, though may vary depending on the current structure of different instructors' and departments' course offerings. These student roles are likely to be most effective in supporting ongoing tech and transcription requirements of various instructors.

PEDAGOGY AND INSTRUCTION SUPPORTS

Careful consideration of educational development spans a huge set of jobs; those in instructional roles cannot be expected to hold and apply all that expertise. This document provides significant support for adapting or reorienting various parts of course(s), but is not meant to replace the expertise and thorough processes of actual educational developers involved in course evaluation and redesign. This is not meant as an intervention regarding pedagogical orientation or active versus passive modes of engagement, but rather specific strategies for greater flexibility and access. Instructors seeking to reimagine their pedagogical approaches should refer to their Faculty Liaison, Teaching Fellows, and/or the Centre for Teaching Excellence directly.

PRINCIPLES FOR SUPPORT NEEDS

COMMUNICATING EXPECTATIONS

Those working in support roles require clear expectations and resources provided to them in a timely manner. They may also need guidance regarding specific subject matter in order to provide accurate transcription and description. Communicate regularly with those in support roles, and request additional support from your Department or Faculty if needed.

TECH SUPPORT

Perform an "orientation" or "pilot class" with your support staff to ensure your recording setup is functioning as understood. The training provided to OLAs and CTSAs was generally regarded as sufficient – this is our recommendation.

TRANSCRIPTION

Provide support roles audio recordings as soon as possible. For courses where students may be discussing personal/sensitive matters, decide whether student voices should be included in transcription/recording, anonymized in transcript, cut from recording, summarized, excluded. Communicate this clearly to both the transcriber and students. Consider the impact of this decision on how willing in-person students may be to share such personal details.

VISUAL CONTENT

Those in support roles need to be able to identify and accurately describe what is shown in images, diagrams, and other visual content. If that information is specialized or students of the class are known to misinterpret or be unsure about it, ensure instructors vet those key items for accuracy before posting.

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