Cornell University

Use of Central Scheduling Tools

Approved by the Academic & Event Scheduling System Executive Sponsor Committee; January 15, 2020
Approved by the Space Use Advisory Committee; January 22, 2020

INTENTION AND SUMMARY

This policy statement is intended to promote the use of centrally supported space and event scheduling tools to provide a consistent end user experience, enhance operational efficiencies and technical support, and gain further understanding of space utilization.

This policy addresses the tool by which a space is scheduled. It is not the intent of this policy to address parameters related to scheduling workflows, especially in terms of unit roles or approvals of space use.

This policy is being revised in conjunction with a project to implement 25Live® as the institutional system of engagement for class and event scheduling. 25Live® is the root system in a project otherwise identified and to be known as Scheduling@Cornell that includes a web site, event registration and approval workflow, and related standardization of practice and policies.

During project implementation, an Executive Steering Committee will govern and decide issues of system configuration, including system security and workflow, that advance implementation of this policy. Beyond the project, a Scheduling@Cornell System Steering Committee will continue to guide decisions regarding policy interpretation and implementation and system configuration.

Appendix A presents a framework for implementing this policy over a period of three years. During implementation of Scheduling@Cornell the Executive Steering Committee for the project may revise the framework objectives and the timeline based on the experience and advice of the Project Team. Once Scheduling@Cornell is in production, the annual review process for the policy will evaluate progress toward full achievement of this framework and will consider stakeholder input and governance objectives in developing an annual revision, as needed.

Appendix A establishes sequencing of rooms into Scheduling@Cornell. It is the intention of the Executive Steering Committee to achieve inclusion of all instructional and event spaces (defined below) in Scheduling@Cornell within a period of three years. The ramp-up period is to allow units and central staff time to adjust to new processes and expectations. Units are encouraged to begin scheduling rooms in Scheduling@Cornell more quickly than the schedule currently requires.

GIVENS

- University Policy 2.7, Reporting the Use of Facilities, defines room types by name and by room type code. The room types follow from the Postsecondary Education Facilities Inventory and Classification Manual (FICM) (May 2006) and are consistent across higher education in the United States.

- Policy 2.7 assigns the responsibility for an accurate physical space inventory to the units occupying the space.

- The physical space inventory is recorded in the Facilities Inventory System (FIS) maintained by Facilities and Campus Services.

- The University provides and maintains central scheduling tools:
  - Scheduling@Cornell for classes and events, and
  - Microsoft® Outlook for meetings. Simply defined, meetings are events with an invited list of known attendees. Meetings often occur in conference rooms.

EXPECTATIONS

Spaces Included in Scheduling@Cornell

The following spaces, collectively identified as *instructional and event spaces*, shall be included in Scheduling@Cornell:

1. Main campus[1] institutional outdoor spaces on a list vetted by institutional risk, security and event staff as appropriate venues for events.

2. Main campus rooms that meet the Policy 2.7 definition for:
   - Classroom facilities (room type code 110),
   - Instructional laboratories (room type codes 210, 212, 220),
   - Assembly (room type code 610), or
   - Meeting room[2] (room type code 680).

   Locations identified in categories 1 and 2 above will be fully scheduled in Scheduling@Cornell and loaded into the system over the course of three phases, as described in Appendix A.

   Further, there should be an exact correspondence between FIS and Scheduling@Cornell[3] for these locations.

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[1] The main campus of Cornell University is in Ithaca, New York and includes Cornell owned and occupied land and buildings between Hanshaw Road to the north and Snyder Hill Road to the south and University Avenue to the west and Game Farm Road to the east. Facilities and land along Freese Road immediately south of Hanshaw Road are included within the main campus. In the Facilities Inventory System, this main campus is captured in Precinct 29.

[2] Meeting rooms are often confused with conference rooms. Although a meeting room may be assigned to a specific organizational unit, it is more available and open to various groups and generally functions in more configurations than a conference room. Meeting rooms are also used more frequently for events with both invited and public attendees. More often than not, the events held in conference rooms include known lists of invitees. Meeting rooms may be configured like classrooms (i.e., with participant focus to the front of the room) and may be equipped with a variety of furniture types. Department seminars are often held in meeting rooms.

[3] The correspondence between FIS and Scheduling@Cornell takes into consideration special circumstances of the differences between the systems, especially: 1) some spaces exist as one more than one room in the inventory (e.g., a space with a balcony will be two rooms) but is typically one room for purposes of scheduling, and 2) some adjacent rooms with movable walls can be combined into larger spaces for purposes of scheduling, so that two or three rooms in the inventory might exist as three to six scheduling space options.

3. Event venues: Spaces not otherwise identified by 1 and 2 above at any Cornell site that host events that require registration based on risk analysis. At go-live, Scheduling@Cornell will include any space not otherwise included in items 1 and 2 above that has required event registration in the last three years.

   Use of event venues for registered events must be recorded in Scheduling@Cornell. All other uses of event venues are optionally scheduled in Scheduling@Cornell.

Viewing Availability

All system users will be able to see the list of instructional and event spaces as well as availability (hours of use, but not details) for all locations in categories 1 and 2 and partial availability for locations in category 3. However, the public search process, through which most general users will be directed, will only return institutional outdoor spaces, institutional meeting rooms, classrooms, and assembly spaces. Institutional meeting rooms are those with a primary intended function to serve the meeting needs of the campus community rather than a single department or unit.

Spaces Optionally Scheduled in Scheduling@Cornell

Conference rooms (room type code 350), defined as those rooms serving an office complex (i.e., considered by organization (a department or unit) or by physical grouping (a group of related office workspaces)) and used primarily for meetings and unit activities that are not directly related to instruction and with known attendees, are not required to be scheduled in Scheduling@Cornell. Conference rooms are typically scheduled in Microsoft® Outlook, the University's calendaring tool.   Conference rooms can be scheduled through Scheduling@Cornell if that is the stewarding unit's preference.

Units may choose to schedule rooms other than instructional and event spaces and conference rooms with Scheduling@Cornell, Outlook®, or by other means suitable to the unit.

RESPONSIBILITIES

Units are responsible for:

- Recording an accurate and complete room inventory, in accordance with Policy 2.7;
- Coordinating with the Office of the University Registrar and the Office of Conference and Event Services to include all instructional and event spaces in Scheduling@Cornell;
- Identifying system users, in accordance with the system roles, and
- Providing sustained leadership in implementing this policy, triaging and resolving exception requests, and facilitating communications between the project team and the unit stakeholders (during project implementation) and after the system is operational.

The Office of the University Registrar and the Office of Conference and Event Services are responsible for:

- Establishing and maintaining Scheduling@Cornell security, including roles within the system, in accordance with direction from the Executive Steering Committee during project implementation, and the Scheduling@Cornell System Steering Committee once the project is complete.
- Supporting the senior executives and the Scheduling@Cornell System Steering Committee in:
  - developing and maintaining procedures to monitor compliance with this policy, and
  - developing and implementing procedures for units to petition for an exception to this policy.

The Director of Capital and Space Planning and the University Registrar will coordinate periodic reviews to verify that rooms supporting classes (including laboratory sections) are properly inventoried in the Facilities Inventory System.

During system implementation, the Executive Steering Committee is responsible for development, interpretation and enforcement of this policy as well as authorization of exceptions. The project team will review loading rooms, security, and other configuration issues with the Executive Steering Committee if there are any questions or concerns regarding alignment with the policy intent.

Once Scheduling@Cornell is implemented, the individuals with executive oversight for Conference and Event Services and the Office of the University Registrar are responsible for interpretation and enforcement of this policy as well as authorization of exceptions, in consultation with the Scheduling@Cornell System Steering Committee.

The Scheduling@Cornell System Steering Committee is responsible for full implementation of this policy.

The Office of the University Registrar, the Conference and Event Services, and Capital and Space Planning will lead the annual review of this policy. Suggested revisions that change the intention of this document in terms of space types or room types included in Scheduling@Cornell will be reviewed with the college associate deans. Both the Space Use Advisory Committee and the Scheduling@Cornell System Steering Committee will be asked to endorse policy changes.

RELATED POLICIES

University policies are published by the Policy Office and space and scheduling-related policies are published by the Division of Budget and Planning. Three policies of particular relevance to the *Use of Central Scheduling Tools* policy include the following:

- University Policy 2.7, *Reporting the Use of Facilities*, requires units to maintain accurate and complete inventories of unit space. This policy identifies room type codes and room type descriptions and provides detailed explanations of each room type.

- *Access to Space for Events* defines expectations and procedures for Cornell units and organizations to gain access to classroom and event space to support mission-driven activities of the institution.
- *Fees for Internal Users of Cornell Physical Space* establishes consistent procedures to determine and charge space rental fees to internal users and describes the circumstances under which a fee may be charged. An Interdepartmental Fee Committee approves the amount of space rental fees.

GLOSSARY

Scheduling@Cornell: A scheduling system that facilitates and manages the scheduling of classes and events, allowing authorized users to search for, request, and reserve times, venues and resources and complete workflow associated with event review and approval. The basis of the system is a vended product, 25Live®, one of several CollegeNet Series25 scheduling and space management products.

Class: An instance of a course offered for a specific period of time by a specific instructor. Some elements that define a class are determined at the course level, including subject, course number, grading option, credit hours, title, and component. The main elements that are specific to the class level are: term offered, instructor(s), meeting times, meeting days, room. Classes are listed in the Class Roster. A class is a subtype of an Event.

Event: An activity that occurs within a specific date and time range. An event may be an academic class, a class-related event, a non-academic campus event, or a community-sponsored event. Event attendees may include specific known individuals as well as the general public.

Facilities Inventory System (FIS): Web-based data management tool used to collect, manage and report physical space inventory and building characteristic inventory data in accordance with Policy 2.7. The Facilities Information Group in Facilities and Campus Services manages the FIS.

Meeting: A gathering of people at a specific date and time for some purpose. Meetings are characterized by required specific attendees. A meeting is a subtype of an Event.

CONTACTS

University Registrar: univreg@cornell.edu

Conference & Event Services: confserv@cornell.edu

Capital & Space Planning: spaceplanning@cornell.edu

Appendix A. Framework for implementing the Use of Central Scheduling Tools policy.

Sequencing Rooms into Scheduling@Cornell

<u>Objective, Go-Live</u>: At the point Scheduling@Cornell becomes operational for the first time (forecast: February 2020), the following spaces will be loaded into the system. All future reservations of these spaces will occur in Scheduling@Cornell.

- General-purpose classrooms (room type 110) and assembly spaces (room type 610) in the undergraduate schools and colleges. These rooms constitute the majority of spaces that support undergraduate class activity, in terms of number of students and number of class sections. These rooms are also most highly desirable as requestable spaces for non-class events.
- Institutional meeting rooms. Institutional meeting rooms will include G01 and G10 Biotechnology and rooms in the Community Centers on North Campus. Subsequent annual reviews may amend the list of institutional meeting rooms.
- Event venues. Any space not otherwise included above that has required event registration in the last three years.

Further additions to inclusion in Scheduling@Cornell will occur in subsequent academic years, as follows:

<u>Objective, Beginning of Year 2</u>:

- All institutional outdoor spaces and non-institutional meeting rooms (room type 680) in the undergraduate schools and colleges.

<u>Objective, Beginning of Year 3</u>:

- All instances of instructional laboratories (room types 210, 212, 220), and

- Classrooms (room type 110), assembly spaces (room type 610), and non-institutional meeting rooms (room type 680) in the professional schools.

Inclusion in Scheduling@Cornell is permitted for any space in advance of any objective, if so requested by the stewarding unit.

Objectives for Viewing, Requesting, and Approving Room Requests

Room requests will follow a detailed workflow process determined during the Scheduling@Cornell system implementation project. For this version of this Appendix to the policy, and until certain system configuration issues are better understood, the objectives are stated at a fairly high level. These statements will be confirmed or adjusted during implementation, and as a result of subsequent annual reviews of this policy.

At system go-live, all faculty, staff and students with a net ID (system requesters) will be able to view the existence of and request classrooms, assembly rooms, institutional meeting rooms, and event venues. All of these spaces will be listed in a master pick-list, but the results of the public search will only include classrooms, assembly rooms, and

institutional meeting rooms. System requesters will be able to then view availability of these spaces. Availability means hours reserved and hours available, not the details of reservations for all locations in categories 1 and 2 and event uses only of locations in category 3.

As spaces are added in subsequent years, those spaces will also appear in the master list but will not be findable through the public search.

<u>Objectives for Approving Room Requests</u>

To streamline configuration and workflow and allow for redundancy, the number of security roles in the system will be held to a minimum. Containing the number of roles will need to be balanced against the ability of the system to route approval workflow as appropriately and directly as possible.

Security roles will not be approved or established for individual rooms or room types within a department-level organization except under the most extenuating circumstances.

Full system implementation should encourage some requests to approve automatically, without staff intervention. Automatic reservations are required to implement walk-up booking and should be a reasonable outcome in other use cases.