

Campus Calendaring and Collaboration Policy

Effective Date: January 1, 2017

Last Update: August 1, 2016

Responsible SAC member: Vice President for Finance and Operations

Policy Owner: Chief Information Officer in partnership with Technology @ Wheaton Governance

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Policy Statement

The College provides collaboration tools to staff and faculty to facilitate efficient and effective communication and collaboration. Outlook (email and calendaring), and Skype for Business/Lync are provided for this purpose. Google Apps (my.wheaton.edu) is provided for students. Consistent use of these tools across campus will improve scheduling efficiencies and ensure that institutional data is accessible to administrators, as needed.

To fully capture the efficiencies these tools provide, the Administrative Application Advisory Committee (AAAC), the CIO and SAC strongly encourage staff and faculty to exclusively use these tools for institutional calendaring, email, and instant messaging. Staff and faculty interaction should occur within Outlook and Skype for Business/Lync. Faculty and staff who interact with student calendars can use Google Apps (my.wheaton.edu) and synchronize those calendars with the primary Wheaton Outlook calendar.

This strategy aligns with the Wheaton College Technology Guidelines (see Supplemental Material) that were adopted in 2016.

Reason for Policy

Academic and Institutional Technology (AIT) provides best of breed software and services to facilitate institutional collaboration and communication. These services are highly reliable and easily accessible via mobile devices. In addition, AIT provides extensive training on how to use these tools through ThunderCloud Training powered by Lynda.com.

Despite the availability of these resources, the campus community has been slow to consistently embrace use of these tools, instead opting to: print meeting schedules on paper for distribution; use doodle.com or other software polls to determine availability; send numerous emails to determine meeting availability; and forward institutional email to off-campus email service providers. A significant number of hours are wasted as people inefficiently work to communicate and collaborate outside of the institutional standard.

Challenges and their Remediation

It is acknowledged that some faculty have minimal interaction with administration; in certain cases, it may not make sense to adjust those business practices. In addition, those who use machines with the Apple operating system may experience challenges when working with Microsoft and other enterprise systems. This issue is not unique to Wheaton College and should not be considered a barrier to adopting this recommendation. In addition, AIT is increasingly encouraging staff and faculty to utilize Windows machines to reduce possible disruption.

Procedures

AIT will coordinate training sessions for all on campus. This will include training for administrative personnel who manage another person's calendar, those who interface regularly with faculty, those who interface regularly with students, and all others, as needed.

Our goal for full compliance is January 1, 2017.

Appendices

Best Practices for Scheduling Your Day and Setting Appointments Using Outlook

Determine if you really need to meet in person. How many times have you attended a meeting and asked yourself, “Why am I here?” Extra travel time and expenses are involved when meeting in person, so avoid it unless dialogue and brainstorming are required. Set up phone or video conferences as an alternative.

Have meeting requests and responses go to your delegate, not to you. Under File, Account Settings, Delegate Access, select “Send meeting requests and responses only to my delegates, not to me.”

As a courtesy to your coworkers, send a meeting invitation instead of an email when you’d like to connect. Rather than emailing colleagues and asking, “What’s your schedule today? Can we get together for 30 minutes?” take a minute to schedule a meeting invitation. While in your Calendar select New Meeting and choose Scheduling Assistant. Add all attendees and check for availability on the calendar (the default setting shows “view free/busy” without meeting details). Find an open time (or select AutoPick to let Outlook find the next available date/time). Meeting details such as an agenda can be added in the Appointment screen. Send the meeting request. When invitees receive it, they can simply click Accept, and Outlook moves the appointment to their calendars for them. This saves the recipient time and also saves you from trying to coordinate multiple calendars manually.

Create a private calendar to post appointments you don’t want others to see. Did you know you can create a separate calendar and view it side-by-side with your default calendar? To create one, right-click on your default Calendar and select New Calendar. Give your new calendar a name such as “Direct Report Time off.” Checking the box next to both calendars displays them side-by-side and using the arrow at the upper right corner of the new calendar, overlays the calendars to see all appointments at once. For truly personal items use another calendaring tool such as Gmail or the calendar app on your mobile phone.

Or, check your appointments as Private when you don’t want others to read the text. Select the Lock (Private) button on the toolbar to mark an appointment as private. People who share your calendar will still see you’re unavailable, but will not see the details of your appointment.

Keep your calendar up to date. It's frustrating when your colleagues are trying to set up appointments, and it appears that you're open, so they send out a meeting request to a large group. You respond, "Sorry, I have a conflict on that day/time," to which they respond in frustration, asking, "Then WHY didn't you have it on your calendar?" Truly, if an organization is going to predictably use shared calendaring to coordinate meetings, you must keep yours current. It's fine to use a traditional paper method as well, but if you schedule something on your "other" calendar, make sure to update your Outlook calendar, too.

Send meeting request responses so that the sender knows whether or not you plan to attend. The meeting coordinator can view attendee responses by opening the meeting invitation and going to Meeting Occurrence, Scheduling Assistant.

Include travel time in a single appointment and put the actual meeting time in the subject. If your meeting starts at 11:30, but it's going to take you thirty minutes to drive there and fifteen minutes to get out of the building to your car, block out your calendar starting at 11:00 (so others can't schedule with you). Then write @11:30 in the subject line, so you know the actual meeting time.

Use the People Pane to Find History. Get into the habit of using the People Pane at the bottom of each appointment. Select a person and expand the people pane to find meetings, go to the address card, and view mail and attachments received from that contact.

Use Instant Search to find an upcoming meeting. Can't find an upcoming meeting with someone you know you scheduled? The search feature will do the trick. Located in the upper right, below the ribbon, enter the name of a participant or meeting owner. The view will change to a list view of all meetings, past, present and future involving that contact. Be sure to select All Calendar Items (upper left).

If someone does send an email wanting to meet, convert it into an appointment. If your colleagues don't understand the meeting feature and insist on sending emails for appointments, you can quickly turn an email into an appointment by selecting Meeting from the toolbar. A new appointment window automatically opens, containing your email and any attachments. Fill in the date, time, and details, and then Save and Close. The message is moved from the Inbox into the Calendar automatically. No more manual copying and pasting!

Block out time to work. Sometimes you might want to actually schedule an appointment to WORK. To protect your time from others, schedule a Task on your Calendar. Add the Task Pane to the Calendar view (not available when viewing a full

month), click on a Task, drag it to your calendar and release. An Appointment window will pop up, automatically inserting the task into the text portion of the appointment item. Fill in the time you want to work on the task on your calendar. Change the Show Time as field to Tentative, if desired. Save and close. The task will still be kept in your Task Pane, but now you've blocked out time on your calendar to work on it. NOTE: Do NOT put things you need to DO on your Calendar (that's what Tasks are for.)

Send lengthy reading materials at least 48 hours in advance. Participants express frustration with wasting time in meetings reviewing materials that were just handed out. They don't have adequate time to digest the information and formulate questions. They could have reviewed that document while walking on the treadmill yesterday. Don't waste everyone's time by forcing them to sit there and read together—their time is much too expensive.

If updating a meeting already scheduled, send an update to the existing appointment. If you have already set up a meeting and invited participants, sending an email about the meeting forces them to either copy and paste the additional information into the meeting or have two meeting blocks for the same event side by side on their calendars, forcing them to open two items to get complete information. If you need to add information, send out a meeting update. To contact meeting attendees with a reminder or other message, open the original meeting request, click the Actions menu, and select "New Message to Attendees."

Schedule time for preparation and action. Depending on your level of involvement in the meeting, you need time to get ready. You might need to start your preparation days before if you need to create a report or give a presentation. When you accept a meeting, immediately go into your calendar and block off at least 15 additional minutes separately for prep time, a bio break, refreshing beverages, and transfer time—and add more as necessary for mental preparation and review. Don't walk into the meeting "cold." In the same way, block out time at the conclusion of the meeting to review action items, activate them into your time management system if you can't complete them right then, and get organized.

Limit attendees to meetings. More is not merrier. Think through who really needs to be there. Don't worry about "hurting someone's feelings" if they aren't included. If you simply want to keep a stakeholder or player in the loop, select them as "optional," instead of "required." Think about how much money people are paid, and ask if your meeting is worth an hour of their pay PLUS what they otherwise could have been doing if they weren't stuck in your meeting. Only invite people if they have a direct contribution to make to the meeting objective, and the desired

decisions would not be able to be made without them. If their presence is only required for ten minutes, give them the first ten minutes, and then allow them to graciously depart. Keeping others who aren't invited informed can be done with a quick email summary or inclusion on the distribution list of any meeting notes or minutes.

Confirm everything. I've often shown up for a meeting and the other person "forgot." It can be a good idea to dash off a quick email or chat to check with the other person. "Looking forward to seeing you on (date) at (time) at (location). Let me know if something comes up." I don't make people confirm that things are correct; I ask them to let me know if there is a change. I look at my calendar for the next day before I leave work and make sure I'm ready to roll on everything. Confirm with attendees, too, when it's your meeting. Open the original meeting request, select Contact Attendees.

Always send or request an agenda and include it in the text portion of the appointment or as an attachment. A basic agenda should include a statement of purpose, any logistical considerations, the decisions to be made, a list of the topics to discuss (in priority order), who is responsible for that item, and how long you are allotting for each one. Ask participants if they have any changes to the agenda items to let you know in advance of the meeting, so you can make adjustments if necessary. Once you get into the meeting, follow the agenda diligently, so you can ensure all points are covered, decisions are made, and the objective is achieved.

Don't let Outlook pick the length of your meeting. The default is one hour, so that's how much time people normally schedule meetings! Instead, match the length of the meeting to the purpose. If you've done an agenda and you've determined you'll only need forty minutes, then schedule for that. Time will expand to fill the amount of time available. If you've promised folks you'll be out of there, people tend to work toward that goal. If there is slack time, more socializing will naturally take place and an hour will definitely get used. Some people try to build in "buffer" time—don't cave to this habit. I purposefully under-schedule and announce the goal at the beginning, so everyone is actively moving forward.

Strike a balance on when to schedule a meeting. If you schedule a meeting too far out, you'll get a bunch of cancellations and requests to reschedule as you get closer. If you wait to schedule a meeting until the last minute, it's hard to find a block of time when most people are readily available. So it's best to schedule around one to three weeks in advance. Anything sooner than that or further than that is fraught with scheduling challenges and conflicts.



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Let the meeting leader know as soon as you're aware of a conflict with a scheduled meeting. If you have a change in your calendar but don't want to "rock the boat," you inconvenience more people the longer you wait. It takes effort to work schedules around appointments, so as soon as you know, raise the flag. The chair can determine if they can make it without you or if the meeting should be moved.

Make it a productive day! (™)

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Guiding Principles

These guidelines are the road map that give direction to the choices we make about technology at Wheaton College.

Guiding principles are simple, direct statements that describe how an organization wants to behave in the long term. These principles establish a context for making operational decisions in areas that leverage technology across campus. They will provide a rubric to help the campus community (stakeholders) in interpreting operations and mission criteria. These principles in some cases are aspirational, something we will collectively work towards achieving in the coming months. These principles will be periodically revisited to ensure relevance.

1. Technology resources must be focused on efforts that directly support Wheaton's priorities in the academic arena. *Christ at the Core* outlines Wheaton's strategy for strengthening its position as one of the top liberal arts institutions of higher education focused on developing Christian world leaders. Technology services should be adequate to support administrative functions and avoid unnecessary overhead for faculty, staff and students. In order to optimize the use of limited resources, needs that are not directly identified as strategic priorities will be met with technology that is adequate but not necessarily leading edge or best in class.

2. College technology principles apply to all of Wheaton. We will seek to work together rather than to create or expand duplicate solutions. The idea behind developing principles at the college level is to ensure that all technology functions operate in the best interests of the entire user community. Wheaton's limited resources should be focused on areas directly related to its core functions. It is not an effective use of Wheaton's resources for multiple departments to be developing different systems that perform the same function. Therefore, departments may have to compromise at times and adopt an enterprise system that provides the necessary functionality and can be supported at a lower cost. Individual departments who knowingly duplicate one another's efforts will cause all of Wheaton to have fewer resources available to direct toward the college's strategic priorities. Failure to embrace this principle will result in the growth of haves and have nots and duplication of effort. We recognize that Wheaton currently has many duplicate systems and we will seek to simplify these wherever possible.

3. Academic and administrative users will strive to communicate their needs and goals as completely and clearly as possible to their technology partners.

Technology projects are collaborative efforts between technology users and technology providers. Users must take their time to articulate their needs and goals in order that the selected technology supports the desired functionality. Providers must take the time to understand the needs and goals of users, and the larger context for them, prior to creating or procuring solutions. Projects should never be just about technology. Rather, they should be about the application of technology as part of a larger effort to improve a process or service or to enable a particular teaching or research activity.

4. Technology service providers across campus will actively solicit input from users and each other on product and service requirements and will include their input in our technology decision-making process.

The user community must have a forum in which to articulate their needs in order for tools and services to have the greatest possible likelihood of meeting those needs and being accepted by the community. All required technology service providers must have an opportunity to ensure the existence of adequate resources to support the project.

5. We will work collaboratively as a community to evaluate and manage technology deployment projects utilizing project management best practices.

By leveraging project management best practices we will increase the delivery of technology projects, on time, and on budget. This collaborative approach will require that all stakeholders work together to accomplish work assignments as agreed upon.

6. We will employ open standards and best practices where feasible and define our college technology architecture (specifications and guidelines.)

We will favor technology options that embrace open standards and best practices rather than proprietary approaches. As a community, we will create a regularly updated technology architecture that will guide us in our decisions.

7. We will encourage exploration of technology innovation at Wheaton.

Innovation frequently occurs closest to local needs. We encourage faculty, staff and students to evaluate new technologies and to involve others in those efforts. We will create a formal process that defines how prototypes or pilots can be supported, evaluated, how they might be adopted as enterprise-wide services and how older services and technologies will be retired. We will be alert for potential opportunities created by 'disruptive technologies' and create pilots to evaluate their usefulness to Wheaton.

8. We will provide and support tools and applications that facilitate electronic collaboration of the faculty, staff and students over diverse locations, in line with college goals. Wheaton College's Strategic Priorities call for promoting liberal arts excellence and the globalization of a Wheaton education. We will support the teaching mission of the faculty by providing increased resources for curricular development and collaborative pedagogy. Wheaton's global aspirations necessitate that we facilitate the collaboration of scholars and provide learning opportunities beyond the campus.

9. The college should ensure that electronic information is readily available to those who need it to accomplish their jobs, regardless of either the physical location of the user or the information. College work often takes place off campus and technology should facilitate, to as great a degree as is financially reasonable, secure access to this information from anywhere in the world.

10. Institutional data should be well defined and accurate. Wherever feasible, information will be captured once, as close to the authoritative source as possible, electronically validated and shared with those who need access. The accuracy of institutional data is of great importance. To maximize data quality, several things need to occur. Institutional data needs to be assigned to an owner or custodian who is responsible for its definition and accuracy. For each data element, the system of record and general means of access should be defined. Avoiding the re-keying of data will maximize data integrity. Institutional data should be integrated rather than copied wherever feasible; however we should have robust and secure methods of sharing institutional data that can be useful in specialized systems at the local level.

11. We will promote an environment that provides protection from unauthorized or inadvertent access, sabotage or disasters and ensures the availability, integrity and confidentiality of information yet does not unduly hinder the college from conducting business as usual. The teaching, research and scholarship of the Wheaton community are the college's greatest assets. The technology community has a responsibility to ensure that this collective investment is appropriately safeguarded from loss. We also have a responsibility to community members to keep personal data appropriately protected. Finally, technology stakeholders must build business continuity into its service development plans in order that the most critical functions continue to be available in the event of a disaster.

12. As a college community, we will adopt an IT service lifecycle process that provides robust and cost effective enterprise services. We must focus our efforts; we cannot deploy every useful technology. In order to control costs, we will focus on deploying technology that is useful across the largest possible set of users, that can serve as the foundation and building blocks for more specialized services, and that is secure, stable, reliable, robust, well documented, and easily integrated. We must select technology tools that are cost-effective in both the short and the long-term and be rigorous about the processes by which we adopt, maintain and retire these tools.

13. Highly routine manual processes will be automated when real benefits can be achieved and documented. The purpose of information technology is to optimize people's talent and time; we will focus people talents on relationships and knowledge-based tasks. We cannot afford to have people doing manual work that technology can do more effectively. Unattended operation, cost-effective automation of routine tasks and automation of deployment and provisioning are top priorities in any technological design and decision.

14. We will consciously establish quality objectives for each technology service and measure performance against those objectives. We will proactively identify and efficiently resolve all issues associated with the quality of our services. Users should understand what they can expect in terms of service availability and responsiveness. Service levels will vary depending on the classification of a service - e.g. pilot or production. In some cases, we may consciously decide that perfection is not the level of quality necessary and may seek 'good enough'.

15. We will facilitate training for approved technology tools purchased by the college and will support those tools. To accomplish its teaching and research goals, the college requires technology tools. Faculty, staff and administrators who depend on these tools should be able to count on the availability of training and support. The level of central training and support will vary depending on the criticality of the function and the number of people that use the tool. In some cases where the numbers of users are extremely small, it will fall to the academic or administrative department to provide this training and support. We will have a regular process to retire the use of outdated or redundant tools and technology.

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