



February 2014

## SPACE RESERVATION SYSTEM WORK GROUP REPORT For the Campus Space Advisory Committee

A work group was appointed in September 2013 to make recommendations to the Space Advisory Committee regarding improvements that could be made involving the scheduling of rooms. The work group included broad representation from: the Schools, Special Events, Student Affairs, Business and Administrative Services, Information Technology, Library, Facilities Management, Academic Senate, Staff Assembly and others. The committee began meeting in October 2013. Most work was completed with the entire work group, although a sub-committee was formed around exploration of Office 360 specifically as a possible common application for room scheduling. Additionally consultation was provided by Information Technology technical staff and University Communications throughout the process.

### Charge

1. To identify and create an inventory of schedulable spaces that can be made available to the campus, along with instructions for use. This information should be made easily available to the campus for bookings;
2. To identify and document how bookable spaces, such as conference rooms and hotel spaces are scheduled. Determine if system consolidation or simplification is possible from the stand point of the administrator and the user (“one stop shopping”);
3. To identify and include special conditions, priority use, or other restrictions on spaces to include as part of a room reservation system;
4. To explore methods for tracking room utilization and for preventing double-booking and unused scheduled rooms;
5. To make recommendations to the campus Space Advisory Committee, including resource requirements and procedures in support of an improved room reservation system for the campus community; and
6. To complete the workgroup’s work within 90 days of the initial meeting.

### Work Product

The work group identified over 150 rooms in 17 buildings (including on and off-campus) that can be scheduled or could be scheduled. A list of key fields for each room was developed, such as:

- Building Name
- Room Name
- Room Type
- Room Area (square feet)
- Room Capacity
- Department Location

- Reservation Process (such as e-mail, web, or other mechanism)
- Contact Person
- System (such as Ad Astra or Outlook 360)
- Hours Available
- Restrictions of special characteristics, such as fees, or limited use

### Observations

It is difficult to locate a comprehensive list of rooms available to reserve. Access can be uneven, or unknown to many. There are a myriad of different room contacts who assist with room scheduling. In some cases, it is unclear why more rooms are not available for use. There are approximately six different major room scheduling systems operating on campus each one with specific business requirements, for example: the Ad Astra system is used for instructional use; Outlook 360 is used mainly for administrative use; the Library operates its own Campus Reservation System; there is a dedicated Dining/Housing Reservation System and a dedicated Recreation Center room and resource management system. Many rooms on campus are tightly controlled and have restrictions. The result is a highly decentralized, and somewhat opaque set of requirements. There are multiple gate keepers, and most people on campus cannot readily find and use rooms. It can be difficult to identify room schedulers/approvers. There is no overarching campus use policy regarding conference rooms.

A consolidated room list as handed-off by the work group to Information Technology for creation of a web-based room list database with the goal to launch it for campus use. It is acknowledged that the database is not be a true room scheduling system (“one-stop” scheduling”). It is a consolidation of existing information and resources available for room scheduling. For business reasons, it is currently not practical to adopt a single room reservation system as there are different needs for some units. The database is a helpful resource nonetheless.

### Recommendations

- Create a database with a comprehensive list of available rooms that can be scheduled and make that information easily available, such as a campus web page.
- Provide instructions for using the list or data base
- Provide links to existing room scheduling systems
- Provide instructions or specifics for room scheduling if there are restrictions or special requirements.
- Determine if the current number of systems could be reduced in the future, such as an expansion of Outlook 360
- May want to further investigate what proprietary systems exist for increased benefits or functionality (software)
- May want to identification a single room coordinator, or dedicated team to help steward the process going forward and to assist with continuous improvement.
- Formation of campus policies around (shared) room access and control are essential.

Currently, there are unique business requirements that make it difficult to use any single room scheduling system on campus as a single system for the entire campus. There are multiple room scheduling applications and it is hoped that some units will be to integrate or consolidate as a result of this work groups’ effort and though education about the issue.

While there is a strong desire to track room utilization, prevent double-booking and prevent unused or underutilized rooms, there are no systems specifically in place. There was discussion of leverage existing data sources, such as logs, cat card, and Facilities Management room control data as potential indicators. This issue requires further examination.

For this review, the work group focused on what could be most readily identified in terms of existing room information. The work group believes that the creation of a web-based database for existing scheduling systems will be a significant improvement to the current condition. Consideration of new room use policies could increase room access and room utilization. Consideration should be given to the creation of a web page known as “rooms.ucmerced.edu” to access the proposed database. Mandatory changes in room nomenclature (how rooms are named in the current scheduling systems) could make finding rooms significantly easier. Establishing room naming conventions is recommended.

It is recommended that best practices at other Universities continue to be analyzed and considered. The work group identified many best practices for room scheduling at the University of Washington and UC San Diego, for example.

Decisions regarding whether the current decentralized room scheduling systems versus a centralized and resources system should continue to be examined by the campus. Procedures for updating the room list created by the work group should be developed.

## **Appendix A**

### Work Group Membership

- Assistant Vice Chancellor – Capital Development (John White), Co-Chair
- Campus Ombuds (De Acker), Co-Chair
- Academic Dean’s representatives:
  - SNS representative (Esmeralda Martinez)
  - SSHA representative (Rhonda Pate, Hannah White, Janet Hansen)
  - SOE representative (TBD)
- Academic Senate Office (Mayra Chavez)
- C.I.O. Office (Faust Gorham and Todd Van Zandt)
- Facilities Management (Ariel Amado)
- Off Campus representative (Katie Unruh, Jason Martin)
- Staff Assembly Representative (TBD)
- Registrar’s Office (Kelly Van Zandt, Laurie Herbrand)
- Special Events (Kim Garner)
- Student Affairs (David Dunham)
- University Library (Eric Scott)
- Staff Assembly (Solomon Ameen)

## **Appendix B**

### A. Suggested Inventory Data Fields

#### **Inventory Data Fields**

*Information that should be provided and/or considered in finalizing the space inventory/catalog*

#### General

Suggested or Typical Use (intended type of use; e.g. conference, instruction, etc.)

Room Type

Room size

Seating Capacity

Space Images

Location

Room fees

#### Managing Information

Department Responsible

Access - how is that handled and by whom. Type of access available should be noted i.e. stairs only or elevator, etc.

#### Space Configurations

Room layout including furniture, trash cans, etc. and possible configurations

Furniture (should indicate if permanent)

Furniture moving and setup - who handles

Facilities Management Setup (auto adds X time to beginning/end of reservation)

Technology / Equipment

Technology / Equipment in Room  
AV capabilities and who handles  
Equipment Available for reservation

Food

Catering Setup (auto adds X time to beginning/end of reservation)  
Kitchen or prep area location

Other

Closest parking available including loading zones and handicap parking  
Signage guidelines  
Other guidelines including use of candles, music, red wine, etc.

**Appendix C**

Going forward, it is recommended that a campus space reservation system include the following system data fields. The information is intended to operate as part of an I.T. managed database with a public face, such as a new web site that would be created and known as: rooms.ucmerced.com

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**System Consolidation Data Fields**

*Information Requested by user to make Reservation*

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- Provide User Instructions
- Enter Request Date (with day of the week noted)

Contact Information

Requestor Name  
Requestor Phone Number  
Requestor Email  
Department or affiliation  
Club advisors name

Reservation Information

Event Name  
Reservation Date  
Reservation Start Time  
Reservation End Time  
Repeating / Recurring  
Number of Attendees

Space Information

Type of event (meeting, practice, special event)  
Preferred building/room/floor location  
Room selection (from drop down list of rooms available w/in RAD facilities)  
Room Type  
Room size  
Seating Capacity  
Suggested or Typical Use (intended type of use; e.g. conference, instruction, etc.)

### Reservation Needs

Technology / Equipment Needs

Any Audio/Visual needs

Catering Setup (auto adds X time to beginning/end of reservation)

Facilities Management Setup (auto adds X time to beginning/end of reservation)

### Cost

FAU

Budget Number (for non-tenants and after-hours meetings)

### Coordination

Additional departments involved - i.e. Catering, Facilities - Events, Grounds, Central Plant or outside contractor

### Reservation at a Glance

Pending Status('s)

Approval Date [this could have sub-fields]

## Appendix D

The following is suggested as specifications for a campus room scheduling system for system administrators.

### **System Managers Data Fields**

*Specifications needed by those managing spaces on campus*

#### System Abilities

- User Instructions
- Ability to notify administrator regarding double booked rooms (i.e. reports)
- Ability to import/export data from Banner (Student Information System)
- Same system for scheduling course sections (classes) and events
- Ability to send confirmation e-mails from a generic account (i.e. regroomrequest@ucmerced.edu) and for each department to have its own e-mail account for requests and correspondence
- Ability to have different URLs so each department in charge of certain blocks of rooms/buildings/room types could have its own site for customers to use to make requests (i.e. For example, Office of the Registrar is presently using:
  - <http://rrr.ucmerced.edu/AstraProd/Portal/GuestPortal.aspx>
  - Library
  - <http://lib.ucmerced.edu/AstraProd/Portal/GuestPortal.aspx>
  - Office of Student Life
  - <http://osl.ucmerced.edu/AstraProd/Portal/GuestPortal.aspx>)
- Availability of Single Sign On
- Availability of APIs for interfacing into other applications and mobile platforms
- Availability of customizable e-mail templates (*preferred, not required*)

### Viewer Options

- Calendar view so that users may see current availability
- Customizable event request templates

### Requestor Information

- Requestor Status (faculty, staff, student)

### Restrictions

- Option to Lock reservations to prevent modification (or not lock)
- Ability to set available times (e.g. 8am-5pm), automatic bouncing to manual approval process for requests outside these times.
- Ability to limit individuals to a # reservations per day, per week, etc.
- Ability to limit total hours of reservations per day, per week, etc.
- Ability to blackout spaces
- Ability to set facility availability hours based upon facility type and room
- Maximum reservation lead time (e.g. no more than six months out)
- Ability to reserve and track equipment reservations (tables, chairs, A/V, vehicles)
- Ability to display availability of all rooms on web page
- Priority / Override parameters
- Minimum reservation lead time (ability / flexibility to program)
- Ability to put parameters on re-occurring reservation requests (#days, #of hours)
- Minimum / Maximum reservation periods (single meetings & repeating meetings)

### Rates

- Integrated rental rates and contracts automatically generated
- Ability to assign different rental rates based upon client type (Dept., non-University)
- Ability to add equipment and set up requirements to reservation contract along with rates

### Approval

- Manual Approval Process for all spaces

### Policies

- Links to policies / procedures / contacts / contracts / etc. (in reservation system, not just in auto-notification emails)
- Agree to adhere to policies (button, check-box, etc.)

### System Replies

- Response from reservation system (immediate reply preferred)
- Automatic replies/responses (fully customizable)

### Confirmation

- Ability to send confirmation e-mails from a generic account (i.e. regroomrequest@ucmerced.edu) and for each department to have its own e-mail account for requests and correspondence
- Confirmation including contact information for day of event

### Cancellation

- Cancellation option (easy to use, fully automated)
- No end user automated cancellation process. Manual cancellation