

# TEMPLE UNIVERSITY

## POLICIES AND PROCEDURES MANUAL

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**Title:** University Scheduling and Space Management Policy  
**Policy Number:** 04.34.11  
**Effective Date:** July 11, 2005  
**Issuing Authority:** Office of the President

### **Scope of the Policy**

This policy consolidates all existing University policies governing class scheduling, space management, event scheduling and external group's access to University space, and adds a new requirement regarding the use of the University's central scheduling system.

The Scheduling and Space Management department (SSM) is established to oversee and coordinate all space management and scheduling activities of the University and is responsible for the recommendation of policies and procedures to provide for centralized inventory, control, and efficient scheduling of all university space for all campuses. Space targeted for management and scheduling includes all instructional, research, public service, academic support, student services, institutional support and operation and maintenance space.

### **Space Management**

This policy reinforces the fact that the University, through SSM, controls the allocation of all Temple University owned or leased space. Blocks of space are assigned for the use of University operational units but will be reviewed and monitored for efficient use by SSM. All needs for change in current space use and allocations must flow through the cognizant senior administrative officer as well as Facilities Management and SSM. Procedures are now in place to allow this to happen in a consistent way.

When the same space is requested by several groups or for various uses, SSM will give priority in the allocation of space in the following order: instructional activities for credit, non-credit instructional activities sponsored by the University, administrative functions, student organizations and activities, community groups and organizations, and other uses that do not fall under any of the above categories.

In instances in which space becomes vacant due to such events as moves to new space, elimination, reduction or change of an existing function, downsizing of staff, or any other reason, such space will be considered unassigned and revert to the control of the University through SSM. No budget unit or individual is authorized to occupy space simply because it is vacant.

Requests for space must be made to SSM on the official University Space Reservation Request Form. Use of this form will initiate SSM's review, in conjunction with appropriate administrators, to determine the allocation or disposition of space. This form is available from SSM in paper form or electronically on the SSM website.

Units that wish to add to, relocate from, change the function of, or reconfigure existing space will be required to submit written requests to justify the desired action. The justification on the University Space Reservation Request Form should include:

- Name of the unit requesting new or expanded space, as well as the type of work that the unit performs and whether that work is currently being performed or is new to the unit;
- Number of employees included in the unit, along with a breakdown of the employees by position;
- Description of the conditions of the unit's existing space that justify the need for the requested action;
- Particular description of the space required, including staff space, file/storage areas, conference rooms, etc.;
- In instances in which renovation or other facilities-related costs are involved, units are also required to complete and attach a Facilities Management Work Request form, showing the purpose(s) for which the space will be needed, identification of funding source(s) for any capital improvements that may be necessary, verification that sufficient funding is available to cover the costs of any increase in the employee headcount that results from facilities-related expenditures, and guidance that such funding is part of the approved University budget

Requests must be routed through the appropriate administrative channels. In the case of schools and colleges, the Dean submits all space requests on the official university form to the Provost, with a copy to SSM. In the case of an administrative unit, the unit manager submits the request on the official university form to the senior officer for the administrative unit, with a copy to SSM. In the case of a student group or organization, the principal officer of the student group submits the request on the official university form to the Office of the Vice President for Student Affairs, with a copy to SSM.

Once SSM and the responsible senior officer have completed their reviews, two actions can be taken:

1. The request is denied, whereupon SSM will notify the requesting unit, with copies to the responsible senior officer, including the reason for denial of the request.
2. The request is approved, whereupon, if necessary, SSM will develop with the assistance of Facilities Management a capital improvement program with cost estimates for any requested renovations or modifications. This cost estimate is then reviewed by the requesting and/or funding unit for feasibility. If the requesting/funding unit wishes to proceed based on the cost estimate, work moves forward through Facilities Management to complete the request, and a copy of the notification to proceed is sent to SSM for its records. If the requesting/funding unit

decides not to proceed, a notification of that decision is to be sent to SSM for its records.

### **Space Scheduling**

SSM will be responsible for ensuring that all space in the university is scheduled efficiently and effectively for both class and class-related scheduling as well as for events for both internal and external audiences. In this scheduling role, SSM will continue to assign certain space to schools and colleges for their specific class scheduling use and to coordinate with administrative offices for event scheduling.

### **Central Scheduling**

All space scheduling for all rooms and all purposes must be entered in the University's central scheduling system. For classroom scheduling, information must be reserved in the University's student information system, which automatically records scheduled events in the central scheduling system. For non-class event scheduling, information is entered directly into the University's central scheduling system.

Temple's Schools of Medicine, Law, Dentistry, Pharmacy and Podiatric Medicine are not currently required to use the central scheduling system for buildings assigned to their exclusive use, but the University reserves the right to review and change those exceptions in its discretion.

Scheduling of offices and the individuals assigned to those offices as well as conference room scheduling will generally be done by the units assigned blocks of space for their use. However, SSM will monitor the utilization of all space assigned in blocks to various units to ensure efficient utilization and will make changes to those block allocations if needed.

Each non-class event scheduled will automatically be assigned a Confirmation Number. University Physical Plant Work Requests related to any event scheduling must include the Confirmation Number.

### **Classroom Scheduling**

This policy establishes standard University procedures for class and classroom scheduling. To ensure the effective and efficient use of classrooms and to meet the needs of students and faculty to have adequate space within an efficient schedule to carry out the instructional functions of the University, a scheduling matrix (shown in Appendix A) has been developed for both daytime and night-time class scheduling for undergraduate classes on the main campus and on the Ambler Campus. Classes in the professional schools listed in the previous section of this policy are currently exempt from compliance with this matrix requirement, but a scheduling matrix may be developed at a later date for both professional schools and for Temple locations other than main campus or Ambler.

Except as set forth in the preceding paragraph, all classes must be scheduled pursuant to the class scheduling matrix according to the following guidelines:

Daytime classes must be scheduled in two formats: at an identical approved matrix time block on Monday, Wednesday and Friday; or at an identical approved matrix time block on Tuesday and Thursday. If necessary, associated recitation or laboratory sessions may be scheduled at additional times on the approved University matrix. Every effort to ensure the most efficient use of classroom space should be made when scheduling these sessions.

The following configurations will be considered consistent with the daytime matrix:

- Two (2) credit courses that meet during an identical approved matrix block on any two of the three Monday, Wednesday, Friday days or on Tuesday and Thursday;
- Four (4) credit courses in two contiguous, approved time periods on two of the three Monday, Wednesday, Friday days;
- Four (4) credit courses on Monday, Wednesday and Friday from 8:15 a.m. to 9:30 a.m. or from 3:40 p.m. to 4:55 p.m., or on Tuesday and Thursday from 8:10 a.m. to 10:00 a.m. or from 2:40 p.m. to 4:30 p.m.

Evening classes should be scheduled in two formats: at an identical approved matrix time block on Monday and Wednesday; or at an identical approved matrix time block on Tuesday and Thursday. In lieu of the 1 ½ hour, two night per week schedule, an option exists to schedule classes for a longer period of time one night per week; but use of this one-night-per-week option must be approved by SSM.

The following configurations will be considered consistent with the evening matrix:

- Courses that meet during an identical approved matrix time block on Monday and Wednesday; or at an identical approved matrix time block on Tuesday and Thursday.
- Courses that meet one night per week for a period of time longer than 1 ½ hours between the hours of 5:00 p.m. and 8:30 p.m.

Weekend classes should be scheduled within one of the approved matrix time blocks 9:00 a.m. to 1:00 p.m. and 1:00 p.m. to 4:00 p.m.

Any requests for exceptions must be sent to the Vice Provost for Undergraduate Studies and SSM and should be transmitted on the official Matrix Exception Request Form.

All requests for exceptions to the matrix will require the review and approval of the Vice Provost for Undergraduate Studies and the Executive Director of the Office of Planning and Policy Analysis. The Vice Provost for Undergraduate Studies and the Executive

Director of the Office of Planning and Policy Analysis will review the justifications offered for each exception and will notify the requesting unit of the approval or disapproval of the matrix exception. In addition, a list of approved exceptions will be included in the Space Utilization Report submitted to the President each Fall and Spring semester from the Office of Planning and Policy Analysis.

Matrix exceptions may be granted on either a one-time or recurring basis. SSM will establish and maintain a list of repeating, qualified off-matrix courses, and will provide copies to the Office of the Vice Provost for Undergraduate Studies.

In addition to scheduling on the approved University matrix, departments should seek to spread class schedules on all days of the week (Monday through Friday) and throughout the day in approximately equal proportions. Specifically, daytime sections should be scheduled as evenly as possible throughout the full matrix beginning at 8:40 a.m. and ending at 4:30 p.m., and an approximately equal number of a department's daytime sections must be scheduled both before and after 12:30 p.m. Additionally, an approximately equal number of sections should be scheduled on each day of the week from Monday through Friday. This means that schedulers should attempt to schedule as many sessions in Monday, Wednesday, Friday time blocks as they do on the Tuesday and Thursday time blocks.

All schedulers must reserve classroom space at the time that a course or course section is opened for enrollment. That is, courses should not be opened for enrollment unless space has been identified and scheduled for that course or course section. In addition, all course matrix exceptions must be submitted for consideration by SSM and the Provost's Office prior to the beginning of the scheduling process for the semester in which the matrix exception is requested to take effect.

Each semester the Office of Academic Records issues a master schedule calendar that establishes deadlines for course scheduling in order to complete the printed and electronic schedule of classes that will be available for student registration. All schools and colleges should submit their tentative schedules far enough in advance to allow time for SSM to review schools' and colleges' overall schedules prior to finalization of space assignments and the publication of this semester schedule of classes.

SSM may review and/or audit departmental scheduling practices for adherence to this policy at any time.

### **Summer Matrix**

To maximize the use of space during the summer, the following summer matrix has been developed to enable the University to schedule more classes in smart rooms, and to maximize the ability for students to take courses in different schools and colleges.

**The first class of the day must end by 10:35.** A 3-credit class could run Monday through Thursday, 9:00 - 10:30. A 4-credit class would be Monday through Friday from 9:00 - 10:35.

**The second class of the day must run from 10:45 through 12:45.** The 3-credit class would be Monday through Thursday from 10:45 to 12:15; the 4-credit, Monday through Friday from 10:45 to 12:20. The end time has been revised to accommodate CIS classes.

**The third class cannot start until 12:55.** The 3-credit class could be Monday through Thursday from 12:55 - 2:25; the 4-credit, Monday through Friday 12:55 - 2:30. The start time has been revised to accommodate CIS classes.

Undergraduate and graduate classes not on the above summer matrix will be scheduled last, and only when space is available. Assigning classes that are scheduled off the summer matrix to centrally scheduled computer labs or smart rooms may not be possible.

### **Event Scheduling**

#### **External Individuals and Groups**

Temple University makes its facilities available to appropriate external individuals and groups. However, because the University's highest priority must be the scheduling of classes, education-related activities, administrative functions, and student activities and events, the extent to which University facilities can be made available for use by external individuals and groups is limited and subject to those priority uses. Facilities on all University campuses (Main Campus, Health Sciences Campus, and Ambler Campus) as well as Temple locations at Center City, Harrisburg, and Fort Washington may be made available, including classrooms, conference rooms, auditoriums, dormitories, and sports fields.

Board of Trustees' policies provide in general that the University may make its facilities available to financially responsible not-for-profit entities, tax-exempt groups and community groups (Policy #04.34.01) and its job placement facilities available to certain employers (Policy #04.34.02). In addition, University facilities may be rented or leased to business entities for education-related activities.

Moreover, as to the appropriateness of a specific individual or group, the University reserves the right, in the due exercise of its discretion and judgment, to deny the use of its facilities when there is reasonable doubt regarding the safety of University personnel, persons or security of the immediate neighborhood attending the event.

Requests for the use of dormitory spaces for overnight accommodation will not be honored, unless it is established to the satisfaction of the appropriate administrator that such accommodations are necessary and incidental to a meeting or conference of an educational character being held on the premises.

Requests from external groups for the use of facilities on any of the Main Campus, Health Sciences Campus and Ambler Campus or at Temple locations in Center City, Harrisburg and Fort Washington must be referred to SSM, which will consult with appropriate University officers before approving space use. SSM may then, after proper execution of required forms, issue the appropriate certification of permission to use the given facility for the purpose designated. In addition, the University may delegate responsibility for scheduling of certain of its facilities to outside entities who schedule and specify the use of the facility, e.g., management of the Liacouras Center.

External users shall be required to indemnify the University from property damage and comprehensive liability relating to use of the facility documentation and to supply the University with evidence, in the form of a certificate of insurance or otherwise satisfactory to the University, of the user's financial responsibility for such indemnity obligation. In general, users of major public facilities, i.e. auditoria, sports fields, etc; specialized athletic or other activity facilities, i.e. gymnasias, swimming pools; and parking lots, whether or not admissions are charged, shall be required to provide evidence of insurance coverage as above. In addition, each external group (or individual) covered by this policy seeking to use University facilities must agree to pay for the University's costs related to the group's use of facilities such as, but not limited to, maid service, safety officers, set-up and clean-up, special equipment, and rental fees, as determined by the appropriate office of the University. These costs will be standardized in accordance with normal University charges, to the extent possible, in a listing or schedule prepared by the Office of Community Relations, which will be made available upon request either electronically or in paper form.

In connection with the process to grant permission for use of space to external groups, it is expected that SSM will designate appropriate administrative staff at the Ambler and Health Sciences campuses and the Temple locations at Center City, Fort Washington, and Harrisburg to act on behalf of SSM in the receipt and processing of requests for use of facilities, provided that on all campuses and at all locations SSM will make the final determination in all matters relating to the application or determination of the policy guidelines contained herein.

SSM will establish a University-wide coordination group whose purpose it will be to better coordinate the use of facilities by external groups for non-class related activities and events. This group, led by SSM, will review and, when necessary, establish, common procedures for the scheduling and use of university space among all campuses and locations including any vendor scheduled facilities.

### **Student Groups/Organizations**

A student group or organization shall be defined as any group of students (undergraduate, graduate, professional) that has been duly registered with the Office of Student Activities.

The Office of the Vice President for Student Affairs both requests space for student activities from SSM and schedules space directly for rooms and areas under its control. Presently, the Office of the Vice President for Student Affairs controls the following areas:

- Specified rooms in the Student Activity Center
- Specified rooms in Mitten Hall
- Specified rooms in Mitten Annex
- Certain outdoor areas:
  - The Bell Tower
  - Liacouras Walk
  - Founders Garden
  - Founders Circle

However, the space controlled by the Office of the Vice President for Student Affairs may be reassigned by the President or other appropriate University Officer if/when they shall deem such reassignment desirable.

### **Notes**

#### **1. Dates of official enactment and amendments:**

Approved by the President on July 11, 2005.

#### **2. History:**

This policy consolidates and/or revises the following Presidential Policies:

Presidential Policy #04.34.012, Classroom Scheduling Policy

Presidential Policy #04.34.11, Interim Space Management Policy

#### **3. Cross References**

Board of Trustees Policy #04.34.01, Facilities Use by External Groups

Board of Trustees Policy #04.34.02, Employers Access for Recruiting at Temple University



**Appendix A**

**UNIVERSITY MATRIX  
for  
Undergraduate Course Scheduling**

**DAYTIME MATRIX**

**Monday/Wednesday/Friday**

8:40 a.m. - 9:30 a.m.  
9:40 a.m. - 10:30 a.m.  
10:40 a.m. - 11:30 a.m.  
11:40 a.m. - 12:30 p.m.  
12:40 p.m. - 1:30 p.m.  
1:40 p.m. - 2:30 p.m.  
2:40 p.m. - 3:30 p.m.  
3:40 p.m. - 4:30 p.m.

**Tuesday/Thursday**

8:40 a.m. - 10:00 a.m.  
10:10 a.m. - 11:30 a.m.  
11:40 a.m. - 1:00 p.m.  
1:10 p.m. - 2:30 p.m.  
2:40 p.m. - 4:00 p.m.

**EVENING MATRIX –  
Two options available**

**I. Monday/Wednesday**

5:00 p.m. - 6:30 p.m.  
7:00 p.m. - 8:30 p.m.

**Tuesday/Thursday**

5:00 p.m. - 6:30 p.m.  
7:00 p.m. - 8:30 p.m.

**II.** In lieu of the 1½ hour, two-night per week schedule outlined in Option I above, an option for the evening matrix exists to schedule classes for a longer period of time one night per week between the hours of 5:00 p.m. and 8:30 p.m.

**WEEKEND MATRIX**

**Saturday**

9:00 a.m. - 1:00 p.m.  
1:00 p.m. - 4:00 p.m.