



# DISTRICT OF WEST KELOWNA

## COUNCIL POLICY MANUAL

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Approval Date: 2008-MAR-11

<b>SECTION: INFORMATION TECHNOLOGY</b> <b>SUBJECT: COUNCIL USE OF MICROSOFT OUTLOOK FOR SCHEDULING</b>
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### POLICY FOR USE OF ELECTRONIC CALENDARS FOR COUNCIL AND STAFF

1. A central calendar of Council activities, called Council Schedule, will be maintained on the system.
2. Mayor, Council and senior Staff will maintain their own personal calendars, ensuring that all appointments and personal commitments are recorded. Each will add their own planned activities to their personal calendars.
3. The Staff person responsible for organizing a Council meeting, or activity, will add the event through the Council Schedule and then invite the participants to attend through the “scheduling” component of the invite process.
4. Outside agencies that need to schedule Council activities will contact the appropriate Staff representative, who will then add the event through the Council Schedule and invite the participants.

### General Procedures:

1. The Council Schedule will be set up as a general calendar that shows all Council meetings, Committee/Commissions meetings and Council attendances.
2. To book a meeting, the Staff person will open the Council Schedule and select the date/time for the meeting. All participants (including those from outside the organization) will be invited to the meeting through the “scheduling” component of the invite process. If any outside participants do not have email, they will be contacted by telephone.
3. For Council attendances put on by outside agencies, the agency will contact the appropriate Staff representative, who will then book the meeting (as per above procedure).
4. If meetings are re-scheduled or cancelled, the Staff person who was responsible for booking the meeting will update the Council schedule calendar to reflect the changes.
5. If meetings are re-scheduled or cancelled with less than 24 hours notice, then Council will be notified by telephone, as well as receiving an email notification.
6. If a Council member is unable to access his or her calendar on-line for any reason, they may contact the Corporate Services Department to obtain their calendar details.

7. A standard (written) booking procedure will be prepared and distributed to all Staff that book Council meetings.

Council Responsibility:

1. All members of Council will be required to use their Outlook calendars to track meeting attendances and to reply to meeting invites (via e-mail), as meeting notices will be received as email messages.
2. Reply to email requests for meetings with either *accept* or *decline*. [Note: as this is a special group mailbox, you will need to contact the applicable Staff representative by phone or separate e-mail, if you have questions or comments as the Staff organizer will be unable to see any attached comments in your email reply.]
3. All personal time commitments need to be added to your personal calendar; otherwise, a Council activity may be booked at a time you are unavailable. [Note: this schedule will only show that they are booked at that time, not what the activity is.]
4. When requested by outside agencies to attend a Council related meeting, advise them to book the meeting through the Staff representative.
5. Regularly check the online Council Schedule for Council activities.

Staff Responsibility:

1. The Staff person requesting and booking the Council meeting will access the Council Schedule and *invite* Council, Staff and outside participants to the meeting.
2. The designated Staff person will be the contact for the meeting and will update the Council Schedule with any changes or cancellation and for the booking and meeting organization.
3. If meetings are re-scheduled or cancelled with less than 24 hours notice, then the applicable Staff person will notify Council by telephone, as well sending them an email notification.
4. A Staff representative will be appointed for each outside agency. This Staff person will be responsible for booking the meetings electronically.

Previous Revision/s: None