The purpose of this policy is to establish guidelines and best practices for efficiently managing calendars and schedules within Barko. This policy will ensure optimal collaboration and communication across departments.

Barko Calendar Management Policy (v1)

Version 1.0
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1. Purpose and Scope

The purpose of this policy is to establish guidelines and best practices for efficiently managing calendars and schedules within Barko.

Effective calendar management is essential for maintaining productivity, optimising time management, collaboration, and effective communication among employees.

1.1. Scope

This policy applies to all employees and departments within Barko, where calendar management is relevant to their job responsibilities, including all employees who have a Microsoft Outlook account.

The following positions are excluded from this policy:

- Employees who work on a centralised Microsoft Outlook account and mailbox such as Branch Managers, Loan Consultants and Cash Tellers.
- Field staff who do not work on Microsoft Office and do not have Barko accounts including, for example, Maintenance Technicians and Cleaners.

2. Responsibilities

2.1. Employees

Employees are responsible for:

- Maintaining their calendars and schedules accurately.
- Prioritising appointments and meetings to ensure efficiency.
- Communicating and resolving any schedule conflicts promptly.
- Familiarising oneself with the calendar management tools and best practices.
- Adhering to the Barko's approved calendar management tools and procedures.
- Respecting other employees' time, priorities and meetings as captured in their calendar.

2.2. Managers

In addition to the above, managers are responsible for:

- Training employees on calendar management tools and procedures.
- Using calendars to effectively manage and direct employee efficiency and priorities.

3. Calendar Tools

Employees should use the approved calendar management tools and software provided by Barko. These tools are used due to:

- Ensuring optimal compliance with security, data protection and other legal requirements.
- Data management and storage for sustainability.
- Best practice as these tools are integrated and support scheduling, meeting invitations, and calendar sharing between colleagues across Barko.

Using the approved tools is vital for compliance with security, data protection and other legal requirements to ensure the sustainability of the business.

The following tools are approved:

1. Microsoft Outlook
2. Microsoft Teams

4. Access and Permissions

In Barko, calendar sharing is a fundamental aspect of efficient communication and collaboration. To ensure a structured and secure approach to calendar sharing, different levels of access and permissions are defined for various roles within the company.

Access levels are set to balance the need for transparency, collaboration, and privacy. Levels are assigned based on the "need to know" principle, allowing individuals permission to view calendars (for example meeting titles) for effective collaboration, such as scheduling meetings and determining priorities.

This approach aims to safeguard sensitive information, maintain productivity, and foster a culture of respectful and efficient communication throughout the organisation.

4.1. Permission Levels

Different permission levels are provided for sharing calendar information including:

- None
- Can view when I'm busy.
- Can view titles and locations.
- Can view all details (title, location, attendees)
- Can edit.

4.2. Management Access

The following permission levels apply for managers:

- Direct managers should have full access to direct reports' calendars.
  - *Can view all details (title, location, attendees)*
- Managers on the same level (Chief, Head, Team Leader) should have access to each other's calendars.
  - *Can view titles and locations.*
- All members in department
  - *Can view titles and locations.*
- All other employees in Barko
  - *Can view when I'm busy.*
- Upon discretion of the employee, one can share additional permissions to other departments or employees.

4.3. Department Access

The following permission levels apply for all employees:

4.3.1 Direct Managers should have full access to direct reports' calendars *Can view all details (title, location, attendees)*

4.3.2 All members in one's department should have access to ensure collaboration and communication
Can view titles and locations.

4.3.3 Upon discretion of the employee, one can share additional permissions to other departments or employees.

5. Privacy and Confidentiality

Even though work time is public and needs to be public to work effectively in flexible times and locations, some privacy and confidentiality principles apply:

1. Making meetings private (direct managers should be made aware of private meetings in work time such as doctor's appointments).
2. Exclude confidential details in the title or body text of the meeting (such as performance discussions). Use generic words such as "Discussion" or "Check-in" and send a separate email with the detail to the individual if needed.

6. Basic Calendar Functions

6.1. Blocking Time for Work

Outlook Calendar is a useful tool for blocking time or using colour coding for specific tasks and projects to manage priorities and tasks efficiently.

Blocking time can be used to:

- Inform others that you are unavailable for a meeting.
- Support planning a week in advance to ensure tasks are prioritised and not only doing urgent unimportant tasks as they arise.
- Determine a realistic timeline for how long a task will take when planning priorities.
- Better control of your to-do list to ensure priorities are attended to and not spending time on urgent, unimportant tasks that arise daily.
- More time for deep work (not multi-tasking).
- Avoid procrastination.

6.2. Create, Edit, and Delete Calendar Events and Appointments

All meetings and events should be scheduled on MS Outlook. This ensures:

- Everyone is aligned on purpose and expectations to prioritise accordingly.
- The right people are in the room to make decisions and be effective.
- Availability of all intended members.

The following should be included in all meetings and events:

- Clear title indicating the purpose.
- Agenda and purpose of the meeting
- Attendees (Required and Optional)
- Time duration
- Expectations of invitees (if preparation is required)
- Location (Booking a boardroom, an employee's office, MS Teams Online)

6.3. Meeting and Event Scheduling Best Practices

Effective meeting and event scheduling is crucial to maintaining productivity, collaboration, and time management within Barko.

The following guidelines will ensure scheduling processes are efficient and effective.

6.3.1. Define Meeting Objectives

Clearly articulate the purpose and objectives of the meeting or event. Ask the following questions:

- What is the primary goal of this meeting or event?
- What outcomes are expected?
- Is a meeting the most effective way to achieve these goals?

6.3.2. Consider Alternatives to Meetings

Evaluate whether a meeting is necessary. Can the objectives be achieved through emails, reports, or other communication tools? If a meeting is essential, keep it as brief and focused as possible.

6.3.3. Prioritise Attendees (Get the right people in the room)

Invite only those individuals who are crucial to the meeting's or event's success. Avoid unnecessary participants, as they can waste time and dilute the focus.

6.3.4. Schedule with Consideration

When scheduling meetings and events, consider the following factors:

- **Appropriate meeting times:** Schedule meetings during standard working hours, avoiding lunch breaks whenever possible.
- **Duration:** Keep meetings concise. Define the expected duration (i.e., 30 minutes, 1 hour) and adhere to it.
- **Avoid back-to-back meetings:** Allow for transition time between meetings (schedule 15 min break buffer time if someone is booked back-to-back).
- **Buffer times**: Incorporate buffer times between appointments to accommodate preparation and travel.

6.3.5. Share Agendas and Preparation Resources in Advance

Distribute meeting agendas, documents, and preparation materials well in advance. This allows attendees to prepare, ensuring a more productive meeting.

6.3.6. Use Scheduling Assistant

Using the Microsoft Scheduling Assistant reduces the amount of time spent to schedule a meeting by eliminating back and forth emails, rescheduling and individually confirming availability.

The Scheduling Assistant automatically shows availability of boardrooms and attendees for a specific timeslot.

For more information and support on using the Scheduling Assistant Tool, refer to the *Calendar Management Guide.*

6.3.7. Confirm Attendees

Send out reminders or confirmations to attendees a day or two before the scheduled meeting and ask for questions. This helps reduce no-shows and late arrivals and allows for an opportunity to reschedule if needed.

6.3.8. Avoid Multitasking

During meetings or events, attendees are encouraged to be fully present and avoid multitasking on other devices or tasks. This is a sign of respect and teamwork.

6.3.9. Record and Distribute Meeting Minutes

Designate someone to record minutes and action items during meetings. Distribute these minutes promptly after the meeting, ensuring that everyone is clear on their responsibilities and the decisions made.

6.3.10. Review and Follow Up

After the meeting or event, evaluate its effectiveness. Were the objectives met? Follow up on action items and ensure that they are completed within the agreed time frame.

6.3.11. Consider Online and Hybrid Meetings

Consider whether an online or hybrid meeting could enable more cost-effective, accessible, and frequent meetings on short notice. For example, employees traveling 2 hours to a destination and 2 hours back for a 30 minute or 1 hour meeting.

The nature of the meeting is vital to consider. For performance feedback, relationship and team building, the value of the meeting outweighs the cost. However, for short progress updates or factual information, online meetings can be utilised effectively.

When doing hybrid meetings, ensure that online participants have access to the same information and opportunities for participation as in-person attendees.

6.3.12. Respect Others' Time

Adhere to schedules and start and end meetings on time. Punctuality demonstrates respect for colleagues' time and commitments.

6.3.13. Limit Recurring Meetings

Regularly evaluate recurring meetings to determine their necessity. If they no longer serve their intended purpose, consider cancelling or modifying them.

6.4. Meeting and Event Management

6.4.1. Responding to invites (accept, decline, propose new time, tentative)

Employees are required to respond to invites within 48 hours (if not on leave). Refer to the automatic reply section for information on what to do when on leave.

6.5. Booking Board Rooms at Head Quarters

Employees are prohibited from using boardrooms as personal offices and workstations. Boardrooms are designated for meetings and collaborative activities.

6.5.1. Booking Procedure

Employees are responsible for scheduling meeting rooms based on their needs, using the calendar management system to check availability.

No specific individual is designated for booking meeting rooms; instead, all employees have the capability to reserve boardrooms through the Outlook calendar management software.

While executive assistants will continue to approve boardroom bookings, it is important to note that they are not accountable for the actual booking process. Individual employees remain responsible for ensuring their meeting room needs align with organisational guidelines.

Refer to the *Calendar Management Guide* for more information on the "Room Finder."

6.5.2. Advance Booking

To ensure availability, employees are encouraged to book board rooms well in advance, particularly for important meetings, presentations, or events where external stakeholders are attending.

Booking of board rooms are on a first come, first served basis taking priority into consideration.

6.5.3. Priority Bookings

- **Priority for External Clients:** Bookings involving external clients will be given priority to accommodate the importance of client interactions and business relationships.
- **Consideration of Board Room Size:** When booking a meeting room, please consider the number of attendees and the capacity of each board room. Meetings with more attendees will be prioritised over those with fewer attendees.
- **Executive Board Room Booking:** The Executive Board Room may be booked when members of the Chief Suite are included in the meeting. This room is reserved for high-level discussions involving executive leadership.

6.5.4. Meeting Details

When booking a board room, employees must provide essential details, including the purpose of the meeting, expected duration, and the number of attendees.

6.5.5. Timely Cancellations

If a scheduled meeting is cancelled or rescheduled, employees must promptly update the reservation to make the board room available for others.

6.5.6. Respect for Others' Bookings

Employees should respect existing board room reservations and seek alternative options if the desired room is already booked. Kindly review the board room availability on MS Outlook before occupying a board room that is vacant.

If an employee schedules a meeting in a board room without making a booking and a prior booking was made, the attendees will politely be asked to vacate. This policy ensures fair and equitable access to meeting spaces, respecting the rights of those who have made prior reservations.

6.6. Collaboration and Availability

6.6.1. "Show As"

The "Show As" functionality in Microsoft Outlook exists to provide a quick and visual way for users to communicate their current availability status, helping streamline scheduling and enhance communication.

Employees are prohibited from putting off the "Show As" function as this hinders collaboration and communication.

Employees are required to indicate "busy" and "out of office" as a minimum and are encouraged to make use of the additional options to increase collaboration across the company.

Different options include:

- *Free* (useful for reminders or placeholders)
- *Working Elsewhere* (useful for remote working, working at different branches than at the office, working from home and attending training)
- *Tentative* (useful for rescheduling or prioritising)
- *Busy* (useful for focus time and other meetings to indicate unavailability for a discussion or potential meeting)
- *Out of Office* (avoid no response frustrations. Integrated into MS Teams for pro-active communication).

This functionality is beneficial for:

- **Enhanced Time Management:** Helps employees manage schedules efficiently by indicating one's availability status, making it easier to plan meetings and appointments.
- **Improved Communication**: Allows colleagues to know immediately whether one is busy, free, or tentative, out of office and thereby reducing the need for unnecessary emails or call inquiries about one's availability.
- **Increased Productivity:** Helps prevent scheduling conflicts, ensuring that one can allocate one's time effectively and minimise disruptions to reschedule.
- **Professionalism:** Demonstrates professionalism and consideration for others by providing a clear indication of one's availability, which is especially important when working in a team or client-facing role.
- **Saves Time:** Streamlines the scheduling process, making it quicker and easier to coordinate meetings and events, resulting in time savings for all participants.

6.6.2. Out of Office and Automatic Replies

Employees are required to indicate when they are out of office to maintain professionalism, ensure effective communication, and manage expectations when employees are temporarily unavailable.

Employees are required to activate "automatic replies" when they will be away from the office and therefore unable to respond for more than 1 day (e.g., vacation, business trips, attending trainings, conferences, or sick leave). Out-of-office messages should be activated through Microsoft Office Outlook Emails and Calendar.

As a minimum, the following information should be included:

- That you are unavailable and the reason why (i.e., attending training, leave).

- When you will be back and can attend to emails and inquiries.
- A contact person's contact number and email address, which will be able to assist in case of emergency.

Example:

"Good day,

Please note that I will be on leave from 01 January 2023, and will be back in the office on 15 January 2023. Kindly expect a delay in my response.

For immediate assistance, please contact Adele Coutts on 123 4567 8910 or email hr@barko.co.za.

Regards

Sally

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7. Training and Support

For any support regarding your MS Calendar, please log a ticket and one of the IT technicians will assist you.

7.1. How to Guide

For more information and step-by-step instructions on the calendar tools and functions mentioned in this policy, refer to the MS Outlook Calendar Management Guide.

8. Implementation

By adhering to this calendar management policy, employees in Barko can optimise their schedules, improve productivity, and contribute to the overall success of the organisation.

This calendar management policy will be effective as of the date of approval, 26 January 2024.

9. Consequences of Not Adhering to the Policy

This is a formal company policy on calendar management in the workplace, and all employees are expected to always comply with this policy. Failure to do so may result in disciplinary action, up to and including termination of employment. The company reserves the right to investigate any alleged violations of company policies and take appropriate action in response. Such action may include, but is not limited to, counselling, reprimand, suspension, and termination of employment. The company will ensure that all disciplinary action taken is fair, consistent, and in accordance with applicable laws and regulations.

10. Review and Amendment

- The company will review this policy on a regular basis to ensure that it remains effective and relevant.

- Any necessary updates to the policy will be made in consultation with senior management and communicated to all employees in a timely manner.
- Employees are responsible for reviewing and understanding any updates to the policy and complying with the revised guidelines.
- Failure to comply with updated policies may result in disciplinary action.
- Any questions or concerns regarding the policy or its updates should be directed to the HR department at hr@barko.co.za.

11. Acknowledgement and Agreement

By accepting employment with Barko, employees acknowledge that they read and understood this policy and agree to comply with its guidelines.

If you have any questions pertaining to this policy, kindly contact hr@barko.co.za.