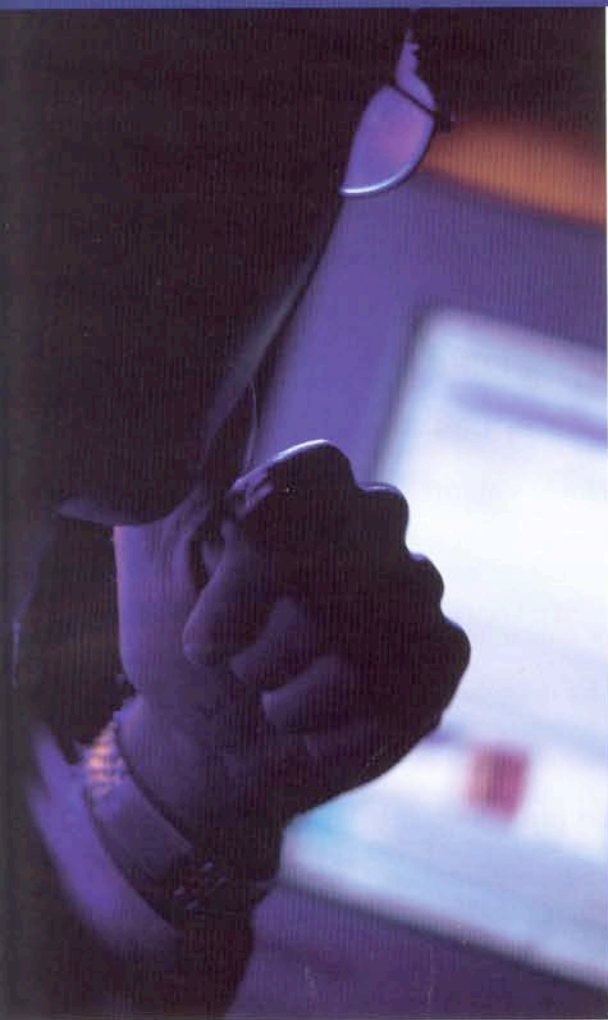


How to select an event management system



A guide to selecting the most effective resource management system for college union and student activities professionals

*By Scott Anderson and
Kevin Raasch*

With today's uncertain economic environment and shrinking academic budgets, college unions and student activities programs are again under pressure to cut costs, develop new business and operate as efficiently as possible. In short, many programs must find ways to get the most out of the resources they have. This means being able to identify, evaluate and compare the tools that will most effectively manage these resources.

Fortunately, advances in event management technology – including increasing use of the Internet – are giving college union professionals more tools than ever to track facilities and resources and are increasing productivity and organizational effectiveness. In turn, these advances have established the need for a step-by-step evaluation process to select the best event management software for an organization's needs.

A primary objective of college union professionals is

to maximize resource utilization. To that end, this article strives to provide an evaluation template for individuals charged with evaluating competitive event scheduling software. Furthermore, it can help college union staffs make an informed decision on whether to retain event management technology provided through an existing vendor or choose “best-of-breed” scheduling software.

In the college union environment, it is not the wizardry of the technology itself that is important, but what the technology can do to positively affect the interaction between college unions and their customers – and directly impact the bottom line of the college union or student activities program. Therefore, in selecting an event management system, college union professionals should be prepared to review and understand the newest advances available to their field.

Indeed, it is often the college union's use of innovative and efficient facilities and event management technology that drives the adoption of such technologies campuswide. Technology that proves its worth as a high-end, online event and meeting manager for student centers and their customers can grow to handle

complex, multilocation, events management for the entire campus.

College union resources that need to be managed and scheduled typically include event scheduling, room scheduling, reservation and setup, catering, event personnel and other campus services, external vendors, and equipment and services such as audio visual, computers and Internet access.

qualitative and quantitative ways. Qualitative measurements of effectiveness would include improved organizational communication, ease of integration with existing hardware and software and user-friendliness.

Quantitative effectiveness would include reduction or elimination of double-booking, reduction in the time spent scheduling, notifying, pricing, invoicing and handling events and activities, reduction in administra-

We gathered sales material, tested the packages and asked lots of questions.

We looked at vendor reputation, reliability, service agreements and training.

Most important, we extensively interviewed vendor references and learned about real-world, day-to-day challenges for student center reservation operations.

Clare Rahm

Associate director, Illini Union

An increase in the perceived value of college unions and their activities can lead to decreased chances of budget cuts – even the opportunity for increased funding based on the ability of the college union to maximize its return on investment – important considerations in any commercial business. In the campus environment, an integrated, efficient event management system can demonstrate value to the administration, the institution and the community.

Choices

Dozens of commercially available event management software packages and services are available. Some are as simple as a basic spreadsheet-type application for scheduling rooms, events, reservations and resources. These packages can grow in capability and complexity to fit the needs of a variety of campus organizations.

Some of the more sophisticated systems available today offer smooth integration with existing software programs and leverage the power of the Internet. Features may include Web-based reservation requests, detailed resource and personnel scheduling, various levels of user-defined customization and automatic e-mail notification. These more sophisticated systems include adjunct capabilities such as multiple rate plans, invoicing and inventory control.

Maximizing resource utilization means choosing the most effective resource management software package available for current and future needs. How effective such a scheduling system is can be measured in several

tive costs for the college union or student activities program, an increase in service quality and the number of students and customers served.

Selection process

College unions face a variety of circumstances when selecting an event management system. The Illini Union at the University of Illinois-Urbana, for example, already had a scheduling system in place and simply wanted to upgrade to a newer, Web-enabled version. However, an Illini Union associate director discovered that getting the current vendor's Web-enabled version would be essentially the same as purchasing an entirely new package. That is when the decision was made to go through a formal review process and evaluate all vendors.

The union listed primary selection criteria, performed a detailed evaluation to narrow the field of vendors, and then conducted a detailed comparison and cost-benefit analysis before making a final selection.

"We gathered sales material, tested the packages and asked lots of questions," said Clare Rahm. "We looked at vendor reputation, reliability, service agreements and training. Most important, we extensively interviewed vendor references and learned about real-world, day-to-day challenges for student center reservation operations."

At the University of California-Berkeley, the Martin Luther King Jr. Student Union faced a platform migration challenge. The union had an existing software system that would not work on the operating system they wanted to move to – Microsoft Windows

2000. The union's facilities services manager said the ability to convert data from the old system into a new one was very important. "It would have been a nightmare to re-enter all the data," said Richard Watson.

The union researched information about event management system vendors through the ACUI annual conference and exhibit hall. They developed a list of primary selection criteria – including ease-of-use and the ability to easily import old information into the new system – narrowed the field, conducted a detailed evaluation and then made their final selection.

While college unions will face a variety of challenges and special circumstances when changing or upgrading systems, the following steps will give most organizations a good starting point and process outline.

The three primary steps in selecting an event management system are: (1) itemize preliminary decision criteria, (2) perform a detailed evaluation of selected vendors that meet the preliminary criteria and (3) conduct hands-on demonstrations to scrutinize software features and functionality.

First, list the minimum features that an event management system must offer your evaluation team to be eligible for consideration. Then add requirements that would be nice to have but are not critical. These become the preliminary decision criteria.

Detailed evaluation

Once you have identified systems that meet most of these preliminary criteria, further evaluate those systems using the initial criteria. This is carried out by creating a short-list grid (See Evaluating event management software, Chart 1), noting the systems to be

Preliminary decision criteria

- Compatible with your operating system and network
- Powerful tools for making and editing reservations
- Ability to schedule services like catering or audio-visuals
- Prevention of double-booking of rooms and resources
- Detailed notes and reminders throughout system
- Billing features, from estimates to accounts receivable
- Significant number of clear, concise reports
- Extensive security options to mirror individual responsibilities
- Web interface for general public and requesters
- Open, flexible and scalable architecture
- Reliable company with reputation for service
- Vendor-offered training and other professional services

evaluated against their ability to perform the previously identified preliminary criteria.

This process of elimination should move the two or three most qualified vendors for your needs to the top of the list and identify several vendors or offerings that simply come up short in too many key criteria. The Illini Student Union, for example, narrowed the field to only two vendors and then created a detailed grid for a side-by-side comparison. The cost-benefit analysis performed on the competing vendors' products actually resulted in the more expensive solution being chosen.

Feature and functionality rating

At this point, it is logical to proceed to an even closer examination and demonstration of the capabilities of each remaining system. By conducting a walk-

Chart 1
Evaluating event management software

	Vendor A	Vendor B	Vendor C	Vendor D	Vendor E
Compatible with your operating system and network	Yes	Yes	Yes	No	Yes
Powerful tools for making/editing reservations	Yes	Yes	Yes	Limited	Limited
Ability to schedule services like catering or AV	Yes	Limited	Yes	Yes	No
Prevents double-booking of rooms and resources	Yes	Yes	Yes	Limited	Limited
Detailed notes and reminders throughout system	Yes	Limited	No	Yes	No
Billing features from estimates to accounts receivable	Yes	No	No	No	No
Significant number of clear concise reports	Yes	Yes	Limited	Yes	Limited
Extensive security options to mirror individual responsibilities	Yes	Yes	Limited	Yes	No
Web interface for general public and requesters	Yes	Limited	No	Limited	No
Open, flexible and scalable architecture	Yes	Yes	Limited	No	Yes
Reliable company with reputation for service	Yes	Yes	No	No	Yes

Chart 2

Hypothetical evaluation of detailed features and functions of top three vendors

	Vendor A	Vendor B	Vendor C
Powerful tools for making and editing reservations			
Provides various graphical views of room use/availability	10	10	8
System searches for available rooms using various criteria	10	8	9
Supports recurring events in one reservation	10	9	9
Supports complex events (multiple rooms, dates and times) in one reservation	9	9	8
Ability to change and move reservations without re-entry	10	10	8
Audits critical booking changes and warns the user when making these changes	10	7	5
Provides utility to copy entire reservations for repeat events (same as last year)	10	0	5
Offers definable statuses to manage workflow (quote, wait list, hold, confirmed, etc.)	10	5	7
Ability to search for existing reservations using any known piece of data	10	10	8
Supports building hours and holidays	10	8	5
Suggests alternate rooms when the same room isn't available every day of a pattern	9	9	5
Ability to schedule services like catering or audio-visual			
Offers definable service categories like food, internal audio-visual, vendor, labor, security, etc.	10	8	5
Supports multiple service times (i.e., catered breakfast, a.m. break service and lunch)	10	9	7
Produces departmental reports like Service Orders, BEOs, Resource Schedules	10	10	8
Prevents double-booking of rooms and resources			
System doesn't allow double-booking of rooms	10	10	8
Provides for automatic setup and teardown time to avoid turnover conflicts	10	10	7
System prevents the overbooking of resources like audio-visual equipment	10	7	9
Offers ability to review inventory levels for any date and time	8	8	10
Detailed notes and reminders throughout system			
Ability to attach notes to specific items (customer, reservation, booking, service order, etc.)	9	5	7
Distinguish between internal (staff) and external (customer) comments	10	8	0
Ability to attach date-sensitive reminders to specific items	10	9	9
Ability to reassign reminders to other staff members	8	8	0
Billing features from quotes to accounts receivable			
Supports multiple rate plans for different customer types (i.e., student, off-campus, etc.)	10	9	8
Tracks charges for every type of detail	10	10	8
Handles discounting and other calculations such as taxes and gratuities	10	8	7
Generates detailed quotes, confirmations and invoices	10	10	8
Tracks deposits, payments and adjustments	9	8	7
Allows for combined or separate billing by department	10	5	0
Manages accounts receivable	10	5	5
Significant number of clear, concise reports			
Generates detailed customer confirmations	10	9	7
Has significant number of operational, managerial, departmental, sales and statistical reports	9	8	7
Reports should allow for filtering by building, status and service category	10	9	7
Operational reports highlight last-minute changes	10	5	8
Offers ad-hoc reporting	7	8	5
Extensive security options to mirror individual responsibilities			
Provides security by room	10	5	8
Provides workflow security by status (i.e., student worker holds space, manager confirms)	10	8	7
Security by service category limits access by department / service provider	10	8	5
Users have access only to the menu items / options they need	9	9	7
View-only access can open but not modify reservations (no need to run reports)	10	0	7
Web interface for general public and requesters			
Provides view-only access to browse and search for events	10	10	8
Allows daily, weekly, monthly and calendar views	10	10	8
Private events and rooms can be hidden from the Web	9	5	8
Web interface can be branded and tailored with custom Web links	9	8	5
Allows for event-specific Web comments and instructions	10	8	6
Offers the ability for customers to submit requests for space	9	9	7
Optionally, and with authorization, allows self-service booking via the Web	10	7	0
Open, flexible and scalable architecture			
Windows-based software with a user-friendly interface	10	10	8
Database accessible with off-the-shelf reporting writing tools	10	10	0
Vendor offers a variety of products and options to suit your needs	10	8	7
Server-based application for scalability and wide-area network installations	10	8	6
Scales up to campuswide / campus calendar use	10	8	5
Supports multiple buildings with centralized or decentralized scheduling	9	9	9
Ability to import/interface with academic scheduling systems	9	5	9
Option to export data to video display systems	10	10	5
Reliable company with reputation for service			
Stable company with a history of serving the industry	10	10	7
Vendor has reputation for good service	10	7	9
Vendor provides plenty of good references	10	9	7
Offers training and other professional services	10	10	8
Provides quality documentation and online help	9	9	9
Offers service agreement including regular product updates	10	10	5
Total Score -->	581	481	394

through demonstration with vendor representatives, college union management professionals get a hands-on feel for each product and its capabilities.

Typical results are illustrated in Chart 2 where detailed features and functions of a hypothetical top three vendors' offerings are listed and then ranked on a scale of 0 to 10. A score of 0 indicates no level of capability or functionality; a score of 10 indicates complete capability or functionality. This gives a chance for the evaluators to delve into more detail. For example, they can see how the software handles multifacility environments, centralized calendars, imports legacy system information, real-time online viewing and booking capabilities, and 24-hour access as well as evaluate the degree of customization and detailed system requirements.

The UC Berkeley college union, for example, needed to evaluate systems in detail for the ability to handle everything from small meeting rooms to large, multipurpose buildings while maintaining clear, concise operational and billing reports.

Additional steps in the decision-making process may include contacting peer institutions, detailed vendor information, third party reviews and customer references.

The selection process certainly involves an up-front commitment of time but reflects the importance of choosing a flexible, functional event management system that can grow with the changing needs of student organizations and campus life. The resulting decision certainly has the capability to influence other departments within the college setting and even the campus as a whole.

College union professionals today are fortunate to have a number of very good event management system packages from which to choose. Key points to remember in the selection process include: gather as much information as possible about the vendors, interview vendor references, conduct a hands-on demonstration of the products and leverage ACUI membership resources and questions. With an integrated, efficient event management system in place, college union staffs can then focus on carrying out the activities and programs that make college unions such a vital part of campus life.

Reprinted from *The Bulletin* with permission of ACUI, 2002.