

Simplifying Facility and Event Scheduling: Saving Time and Money

The current economic slump and the associated fiscal belt-tightening mean that school administrators are learning how to do more with less. School districts already have a limited number of facilities in which to hold classes, meetings, and extracurricular activities, and finite resources to support those school events.

Now, administrators are also under pressure to add community events to the mix! Never has there been a greater need for effective organization.

The Manual Method

In the early 1980s, before the proliferation of personal computers, school facilities management required lots of paper shuffling: request forms, a calendar or reservation book, function sheets, and a variety of daily reports. A surprising number of school systems continue to use this paper-and-pencil process, which goes something like this: Customers complete reservation request forms and submit them to the facilities office. A scheduling coordinator checks the reservation book to verify availability (a tedious task for recurring events), blocks out time in an appropriate room, and fills out a detailed multi-part function sheet. Copies of the function sheet are distributed to everyone involved in servicing the meeting or event (custodial or operations, audiovisual, foodservice, etc.). Then, each day, someone gathers and sorts all the function sheets for the following day and types up a work sheet for the custodians, work orders for service providers, and an overall event schedule.



That process sounds relatively easy until you throw the proverbial wrench into the works. In event scheduling, that “wrench” comes in the form of changes: changes to the date or time of events, changes to the number of attendees, changes in location, changes to resource requirements, such as audiovisual equipment, foodservice, and so forth.

As you might expect, this type of manual, labor-intensive, paper-based system often results in “challenges” that require even more labor to resolve: double-booked rooms, miscommunication with custodians and service providers, scheduling conflicts with other schools in the district, and frustrated people who cannot get the event information they need quickly and efficiently.

The complex task of scheduling events and resources, and communicating event information throughout a school district, seems like the perfect candidate for computer automation.

The Technology Solution

Great examples of how to simplify event and resource scheduling come from student centers on university campuses. These facilities host a wide variety of meetings and events each day, including student organization meetings, faculty and staff functions, and other special events. The Lory Student Center, where I worked while attending Colorado State University, is a case in point.

In the early 1980s, this 30-room, multipurpose facility hosted between 50 and 75 meetings and events daily, which meant that each room was used two to three times a day. Often, I was the per-

By Kevin Raasch

son who spent the evening manually generating the stack of reports that would be needed to coordinate the next day's events.

Well aware of the inefficiency of their manual scheduling process, the event planning staff at the Lory Student Center began looking for a software program to help them with facility scheduling. After an exhaustive search, they decided to hire Dean Evans and Associates, Inc. (DEA), a software development and consulting firm, to develop a custom program for them. Using input from the Lory staff, DEA created a system that was designed to

- Provide a quick means of answering customer inquiries for space availability,
- Eliminate the double-booking of rooms,
- Track event details (setup requirements, audiovisual needs, catering, etc.), and
- Produce daily operational reports.

DEA delivered a product they called the Event Management System (EMS), and the Lory staff began the monumental task of transferring paper records into the system. After everything had been entered into the computer, the old reservation books were locked in a storage bin, and the Lory Center reopened with its new computerized reservation system.

EMS had potential as a commercial application. It developed from the Wang minicomputer platform to the Windows-based EMS Professional, which used advances in computing power and database sophistication to provide faster, more secure, and more reliable data access. Then came EMS Enterprise, which uses Microsoft's powerful SQL Server technology to accommodate districtwide scheduling.

In addition, Virtual EMS allows users to access an organization's web site and view a list of scheduled events or search for available space in real time. With some versions of Virtual EMS, users can also submit space requests or actually create a reservation within the EMS database.

Northshore School District and Columbia University are two organizations that have harnessed the power of technology to manage facility use.

Northshore Schools: Bringing the District On-Line

Like college student unions, schools and districts face the challenges of coordinating facilities use and managing events. With the call to build more small, neighborhood schools, facility coordinators who schedule a handful of buildings today may well be juggling dozens in the near future.

Sara Land faces that challenge today as the facilities and field use specialist for the Northshore School District, located near Seattle, Washington. Northshore is the 10th largest school district in the state. Events are held at 30 schools across a 60-mile radius. Even at a nominal rental fee, use of the district's conference rooms, gymnasiums, athletic fields, and other spaces generates income to support Northshore's education objectives.

For years, Land used a software program that was slow at best and regularly yielded unreliable data and incomplete reports. Double-bookings, frustrated customers, lost revenue opportunities, and late nights were common for Land and her team. Deciding it was time for Northshore to invest in its scheduling "business," she developed a list of requirements for an event management software program and began her search. After a thorough evaluation process, the district purchased EMS Enterprise.

"It's easy, it's accurate and it's fast," Land says. "When a room or facility is booked, the software sends relevant booking information via e-mail to the custodians, building managers, and school administrators affected by the event. Since they have plenty of time to plan their responsibilities around that event, they're more efficient in their work."

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Columbia University: Campuswide Scheduling

Situated in the southwestern corner of the Columbia University campus in New York City, Lerner Hall is the center of campus activity. The building contains a variety of meeting and event spaces, including computer labs, lounges, music rehearsal and art exhibition spaces, an auditorium, and various student service offices.

As Columbia prepared to open Lerner Hall in 1999, the staff there needed a sophisticated software system that would centralize and standardize their facility's event management operations. Previously, Dara Falco, Lerner Hall's associate director for event management and scheduling, had tried using a program designed for classroom scheduling, but found that it could not handle the task of scheduling events for over 900 customers.

Like Sara Land at Northshore, Falco started her search for a better system and ultimately settled on EMS Professional. Lerner Hall decided to upgrade to EMS Enterprise and brought a number of other campus entities (Faculty House, the School of Journalism, and the Law School, to name a few) on-line with them. And now, with the implementation of the Virtual EMS web-based viewing and requesting tool, Columbia has a campuswide, one-source scheduling operation.

Selecting a Management System

So, how can you make the most of the facilities and resources you have? Fortunately, advances in software technology—especially related to the Internet—have given school

administrators a variety of tools from which to choose. However, the combination of limitless options and, typically, a limited budget makes it imperative that administrators conduct a thorough evaluation and selection process. This process includes (a) delineating your requirements and preliminary decision criteria, (b) researching the available options, (c) comparing features and functions in a detailed evaluation, and (d) conducting hands-on evaluations to scrutinize the finalists. Although each school administrator faces a unique set of circumstances when considering a scheduling system, these steps will give decision makers a good foundation for their software evaluation.

DELINEATING REQUIREMENTS

The first step in considering an event management system is to delineate your requirements—deciding exactly what you need and establishing your preliminary decision criteria. List the minimum features that an event management system must offer to be eligible for consideration, then add functions that would be nice to have but are not critical. For example, Northshore School District used the list of requirements in Table 1.

RESEARCHING OPTIONS

Literally dozens of event management software packages are on the market. Some organizations attempt to use simple spreadsheets to track room and resource availability. Although this is a low-cost option, it is not generally *cost-effective*.

True event management software packages include a wide range of features and functions. Some of the more advanced systems offer 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. The most sophisticated systems can provide capabilities, such as invoicing, inventory control, and group-specific pricing schemes.

You can research the available systems through a number of sources, including the Internet, association resource guides, and colleagues. Once you have identified potential

List of Requirements	Importance
Handles meeting and event scheduling requirements	Must Have
Manages services and resource inventory	Must Have
Handles pricing and billing for rentals	Must Have
Eliminates double-booking of rooms and resources	Must Have
Provides comprehensive reporting	Must Have
Easy-to-use, flexible, and scalable architecture	Must Have
Web interface for general public and requesters	Nice to Have
Reliable company with reputation for service	Nice to Have
Vendor offers training and other professional services	Nice to Have

event management software vendors, gather as much information as possible from their web sites and call to request sales materials. With information in hand, you should be able to compare each product against your preliminary decision criteria. You can do this by creating a preliminary criteria grid (See Table 2) that shows the systems to be evaluated, the desired criteria, and the product's ability to meet each criterion. This process of elimination should move the two or three systems that most closely meet your needs to the top of the list and identify several products that come up short in key areas.

COMPARING FEATURES AND FUNCTIONS

You can now conduct a detailed evaluation in which you compare the features and functions of each. Do this by creating a features and functions grid (See Table 3) that lists software attributes that support your preliminary criteria.

	Product A	Product B	Product C	Product D	Product E
Handles meeting and event scheduling requirements	Yes	Yes	Yes	No	Yes
Manages services and resource inventory	Yes	Yes	Yes	Limited	Limited
Handles pricing and billing for rentals	Yes	Limited	Yes	Yes	No
Eliminates double-booking of rooms and resources	Yes	Yes	Yes	Limited	Limited
Provides comprehensive reporting	Yes	Yes	Limited	Yes	Limited
Easy-to-use, flexible, and scalable architecture	Yes	Yes	Limited	No	Yes
Web interface for general public and requesters	Yes	Limited	No	Limited	No
Reliable company with reputation for service	Yes	Yes	No	No	Yes
Vendor offers training and other professional services	Yes	Yes	Yes	Limited	Yes

Table 3. Features and Functions Grid

	Product A	Product B	Product C
Handles meeting and event scheduling requirements			
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 reentry	10	10	8
Audits critical booking changes and warns 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 work flow (quote, wait list, hold, confirmed, etc.)	10	5	7
Ability to search for existing reservations using any known piece of data	10	10	8
Suggests alternate rooms when same room isn't available every day of a pattern	9	9	5
Manages services and resource inventory			
Offers definable service categories (e.g., food, A/V, vendor, labor, security)	10	8	5
Supports time-specific services within a reservation	10	9	7
Produces departmental reports (e.g., service orders, work sheets, resource schedules)	10	10	8
Handles pricing and billing for rentals			
Supports multiple rate plans for different customer types (i.e., internal, external, etc.)	10	9	8
Tracks charges for every type of detail	10	10	8
Handles discounting and other calculations (e.g., taxes and gratuities)	10	8	7
Generates detailed quotes, confirmations, and invoices	10	10	8
Tracks deposits, payments, and adjustments	9	8	7
Manages accounts receivable	10	5	5
Eliminates 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 overbooking of resource, like A/V equipment	10	7	9
Offers ability to review inventory levels for any date and time	8	8	10
Provides comprehensive reporting			
Generates detailed customer confirmations	10	9	7
Includes 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
Easy-to-use, flexible, and scalable architecture			
Windows-based software with a user-friendly interface	10	10	8
Database accessible with off-the-shelf report-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 districtwide use	10	8	5
Supports multiple buildings with centralized or decentralized scheduling	9	9	9
Web interface for general public and requesters			
Provides view only access to browse/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 customers ability to submit requests for space	9	9	7
Optionally, and with authorization, allow self-service booking via the Web	10	7	0
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 on-line help	9	9	9
Offers service agreement, including regular product updates	10	10	5
Total Score →	456	393	325

In the features and functions grid, assign a numerical rating to each entry and calculate a total score at the bottom of a column. To acknowledge the relative importance of one feature vis-à-vis another, you could create a “weighted” grid by applying multiples to certain items (e.g., multiplying the 1–10 score for “Manages accounts receivable” by 1.5). Notice that the vendor companies and their services are rated as well. A product is only as good as the company behind it.

As the basis for your rating, you can scan the materials you gathered, ask questions of each vendor, and view any available demonstrations. Typical results are illustrated in Table 3, where detailed features and functions of three hypothetical products are listed and ranked. This step in the process should help you narrow the field of choices even further before you scrutinize the finalists by conducting hands-on evaluations.

SCRUTINIZING FINALISTS

It is time to take an even closer look at the capabilities of each remaining system. Ideally, the hands-on portion of your evaluation should consist of two parts: a vendor-guided review of the product followed by a self-guided tour. The vendor representative can help you quickly understand how the program works and its capabilities. However, that person also knows the product’s weaknesses and is skilled at steering you away from them! That is why it is important to take some time to evaluate the product as if you were using it, unaided by an expert, in your work environment. You may then want to return to your features and functions grid and rescore some of your criteria based on your firsthand experience.

Additional steps in the decision-making process may include reading third-party reviews of the software and interviewing people who are actually using the system. Even the most detailed evaluation of a program cannot uncover all of the “gotchas” that are encountered by someone who uses the product regularly.

To properly review event management systems and select the right one for your organization, you must commit a significant amount of time and effort to the project. However, the results—increased efficiency, better customer service, and a positive impact on your bottom line—make it time and effort well spent. ■

Kevin Raasch is executive vice president of Dean Evans & Associates, which develops, markets, and supports software products for facility scheduling and event management. He has been involved in software design, programming, training, and installation.

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