

The Complete Guide to Event Management

With everything education institutions manage, events can often fall to the bottom of the list when it comes to improving processes. Proper event management, however, is highly beneficial to K-12 and Higher Education organizations alike. Though the two require some differences in approach, running successful events is cost-effective and reputation-building, no matter the institution.

For K-12 schools, facilities often lend themselves to being community centers outside of school operating hours. In schools that are public, community members may request to use school facilities for club meetings, fundraisers, athletic events, etc. When the event management process is organized and streamlined, this builds relationships between schools and their communities and offers an opportunity for schools to build their brand. Run poorly, this could be a recipe for a damaged facility, compliance issue or drain on school resources.

For colleges and universities, the motivation to host events differs a bit. At these institutions, student recruitment and retention play a large role. Competition for recruitment among colleges and universities is high, and these organizations are unique in that they have a certain level of duty to provide social activities for students and alumni. Social engagement is a big deciding factor for acquiring prospective students and retaining enrolled students. Another, more financially beneficial reason to host events is that, to be blunt, students who enjoy their college experience are more likely to become alumni who donate money back to their alma mater. Out of surveyed alumni, [48 percent](#) reported that clubs, chapters and reunions impact whether they engage post-graduation.

With the benefits there for all education institutions to host events, how does an organization do it safely, smoothly and efficiently? Here are key aspects to consider when structuring your event management process to make sure the events you host provide gain for all.



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Streamlining Your Event Management Process

Though hosting events is beneficial, no one said it would be easy. But it can be once you get your internal event process in order. Common issues education institutions face when attempting to host events include the flood of event requests that come in, coordination between vendors and internal departments, financial loss, facility damage, retrieval and storage of important documents, lack of staff to manage it all, and event calendars that don't function properly and result in double-booking or other confusion and frustration. There are a lot of moving parts to event management, but there's one word that can turn a struggling events team into a well-oiled machine: **automation**.

Having an event management system that allows your team to automate tasks is crucial to successful hosting. The right system will streamline your workflow, meaning no more scrambling to manage incoming requests or remembering to send out that invoice. Your system is only as good as your processes and procedures, though. Once you have those in place, the software can then help you execute those processes and procedures much more efficiently and effectively. An event management system gives you a single, organized place to store and manage all event tasks, and the automation element frees up staff to work on the things that really need their focus.

Workflow isn't the only thing that improves with a proper system, though. Getting a system with an online portal that allows event requesters to submit their requests is a huge time saver. Combine that with an effective, branded, centralized events calendar, and you'll greatly increase communication and transparency for both event requesters and attendees. With a centralized calendar, the public can see exactly which dates and times are available. No more double-booking. No more confusion.

The logistics of event hosting are also easier with a management system. A proper system will give you a place to digitize and manage important documents, like invoices, insurance paperwork, signed contracts and more. Instead of having stacks of paperwork across every surface in the office or file cabinets you have to rifle through every time you need something, all of your documents will be in one, secure place and easily accessible.

Engaging Your Community

Community engagement may look different for K-12 schools than it does for colleges and universities, but the end goals are often similar. While K-12 may lean more toward relationships and Higher Ed more toward recruitment, all institutions seek revenue. Viewing event hosting as financial gain isn't greedy; it's necessary for organizations to re-invest back into their operations to better serve their students and community. Having a high level of community engagement is a crucial ingredient for successful event hosting.

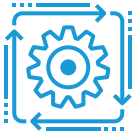
For K-12 organizations, community most likely refers to:

- › Students
- › Students' parents and guardians
- › Community organizations
- › Faculty and staff

Within Higher Ed, community includes:

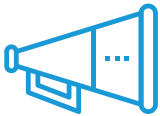
- › Students
- › Alumni
- › Prospective students
- › Student groups
- › Intramural sports
- › Fans
- › Faculty and staff

There are five pillars you can use to improve your community engagement.



1. INTERNAL STRATEGY AND PROCESSES.

Assess how easy and enjoyable you're making events for your community from the start. Review your organization's processes around rental agreements and requirements, submitting requests, making services available for renters, event approval, billing and invoicing, conflict avoidance (as with double booking), and risk and liability. Get buy-in from leadership regarding how any deficits in these processes are affecting your bottom line. Define together what success is for your program. Is it revenue? Attendance? Satisfaction? Something else?



2. PROMOTION.

No matter how well-planned your event is or how many facilities you have available to rent, there's no chance of being successful if no one attends or knows what you have to offer. You have to promote your events and facilities. To do that, get clear about who you want to attend. Consider the best platforms to reach those people on, and make sure to provide sufficient, easy-to-find information about your event. To promote your facilities, think about what questions you would have if you were the event requester. What information can you answer upfront? Can you provide photos or videos of the space? Make this information available before anyone has to ask for it, and engagement will undoubtedly increase.



3. COMMUNICATION.

This goes back to having a centralized calendar that's accessible and fitting to your organization's needs. Do you need sub-calendars or filtering by location and type of event? Can people subscribe to certain calendars based on their interests? Are there automated notifications for new events or changes to existing ones? Are events easily shareable on social media or over email?



4. INSIGHT.

Here's where an event management system can greatly help elevate your event programs. As with anything, it's important to track and analyze feedback about how you're doing. Your system not only helps you manage all event-related tasks; it also collects data about them that you can use to make improvements. This allows you to see which locations are being rented the most, which events were the most highly attended, etc. You can also collect data around utility usage during events to see where changes are needed, as well as gather feedback from event goers and renters to aim for continuous improvement.



5. IMPROVEMENT.

Having the insight isn't enough; you have to use it. Your events team and necessary stakeholders should meet regularly to assess how your event programs are running based on the data and feedback you've collected. Don't be intimidated if things aren't looking so great at first. Start small with what you have and work your way through improvements.

Collecting Funds to Reinvest into Your Organization

No matter your organization, you'll likely host a lot of events. Annual averages for the number of events per student range from .41 for the largest institutions in the US to 2.81 for the smallest, depending on enrollment size. That's quite a bit of work and time, so there better be a solid return on your investment. **Over 80 percent of organizations lose money on community facility use that likely could have been avoided.** No organization has money to burn. Without a plan to recover funds, events can quickly become a budget drainer. Facility usage creates wear and tear on your buildings and equipment, and increases the strain on support service teams (custodial, maintenance, IT, food service).

What is often overlooked in the facility use conversation is the financial impact all of these rentals have on an institution. Scheduling

events and coordinating support services can be a complicated process that involves many stakeholders. Between checking spaces for availability, routing requests for approval through multiple channels, notifying service providers and checking for proof of insurance, principals and site secretaries, the business office, department heads and teachers, as well as the food services, custodial, technology/AV, energy management and maintenance departments could all be all involved in a single rental request.

Taking into consideration all those moving parts and associating a cost with each one, it starts to add up quickly. **Dude Solutions estimates schools incur about \$70 per student per year due to facility use.** And while public K-12 schools are not a for-profit business, pressure from shrinking operations budgets forces schools to think about how to minimize the loss incurred from facility usage.

ENROLLMENT RANGE	AVG EVENTS TOTAL	AVERAGE EVENTS PER STUDENT
<1,000	1,644	2.81
1,000 - 2,499	2,208	1.32
2,500 - 4,999	3,475	0.95
5,000 - 14,999	5,886	0.69
15,000 - 24,999	9,270	0.47
25,000 - 49,999	16,516	0.46
> 50,000	36,503	0.41

That said, how many events are you hosting, and how much are they costing you? To get on the path of cost recovery, follow these steps:

1. **Distribute event management.** Decide what tasks to centralize and what to distribute. An automated, role-based, multi-user facility scheduling solution makes this easier to manage.
2. **Automate the process.** Automating event management not only reduces workload and increases communication by keeping everything running through one system, it also prevents errors and duplicate entries.
3. **Start small and gain buy-in.** When implementing an event management program, begin with only certain types of rooms or certain buildings. Gain support and buy-in from administrators and assistants, and then let those positively affected by the changes help sell the idea to the rest of the district or organization.
4. **Know where costs should be recovered.** Institutions should at least estimate costs for administration of events, custodial services, utility usage, supplies, and facility wear and tear.
5. **Develop tiered fee structures.** Most successful institutions establish a simple fee structure for the various types of community groups that use the school facilities. Groups are categorized to establish cost recovery fees based on the degree of connection with the students or the community. An example could be:

Category 1	school groups	no charge
Category 2	nonprofit groups	cost recovery fee, no rental charge
Category 3	community groups outside district boundaries	modified commercial rental fee, custodial fee, recovery fee
Category 4	commercial groups	market rate charge

6. **Improve invoice management.** A billing experience that is accurate from start to finish improves service to the school's customers and the community users, as well as increases the likelihood that the group will use those facilities in the future. In the most streamlined organizations, a quote is provided to set proper expectations. The final approved quote becomes the contract and the invoice, paid before the event occurs. If paid after the event, be pleasantly persistent with past-due notices. An invoice not collected is funding taken away from the students. Again, having automated tools to help you carry this out is key, particularly for situations like setting up invoices to be sent right upon event approval, having automated follow-ups if people haven't paid within a certain timeframe or having ways for your community renters to pay online.
7. **Establish presence at events.** One of the largest and most quantifiable costs from community use stem from custodial labor charges. However, this presence is important. Having a presence of some sort onsite during events reduces damage to property and equipment and protects the district.
8. **Collaborate with peers.** When reviewing the benefits of cost recovery and all that encompasses facility use, consider networking with peers to learn what others are doing and share best practices. User groups that meet on a regular basis, even if it's only once or twice a year, help build relationships that foster a cooperative learning environment.

Mitigating Risk and Hosting Safe Events

No matter what audience you're serving, there's no point in hosting events if you can't do it safely.

While event attendees are on your premises, you hold a certain level of responsibility for what happens to them while there. There are three key actions you can take to reduce risk and ensure your events are safe for all involved.

- 1. Track everything.** Keep a consistent, reliable log of everything event-related. Know who is in your facilities, why they're there, where they are and what they're doing. Track all students, faculty, staff, visitors and renters, not just during school hours, but after hours and weekends as well. Tracking is also important for insurance purposes. Maintain records of valid insurance certifications, signed contracts, invoices and contact information for those hosting the event.
- 2. Don't sell your facility short.** Risk doesn't just pertain to security – it's also about being able to maintain the integrity of your facility. When inviting people into your buildings, you run the risk of incurring damages. To ensure this doesn't become a drain on your resources, it's a good idea to collect a deposit to go toward total fees and damages. Don't be afraid to charge what your buildings are worth.
- 3. Consistently stick to your policies.** It only takes one slip up to pose a threat to your institution's security, liability or budget. By sticking to the two rules above consistently, you greatly reduce your risk of having an issue. That means not letting a single event requester slide by on following procedure, collecting all required information at the appropriate time and following through on fee collection according to your institution's pricing structure. Remember that when you compromise these things, you're compromising what you're able to provide for your students.

Becoming More Data-Driven

This ties into the Insight and Improvement aspects of community engagement. As with all the other operations of your institution, if you're not tracking and analyzing your efforts, you don't have much to go off to improve your offerings. Having accurate data enables your team to work more strategically. When you have feedback and are tracking data through your event management system, you can see what's working, what's not and what just needs a couple tweaks. Data helps you in all aspects of event management and allows you to provide better services to requesters and attendees. The better your events and service, the more engagement you'll have. The more engagement, the more revenue and recognition for your organization.

If you're not already tracking event-related data, consider a system that allows you to keep up with aspects like:

- › Number of events hosted
- › Hourly breakdown
- › Invoices sent versus paid
- › Usage by organization type
- › Associated costs
- › Utility usage

Also consider tracking KPIs (key performance indicators) around things like revenue, satisfaction and space utilization. To gauge satisfaction, an event management system that allows you to survey event requesters and attendees can make a big difference in what you offer. Your community may have a different impression of your processes and service than you do. That's something you want to know. But again, don't just track the data; use it. Meet with your team and stakeholders regularly to unpack your data, learn from it and make improvements accordingly. **Data leads to insights that create actions.**

Getting Started

It's easy to be intimidated by a program overhaul, but having a streamlined, effective event management process doesn't happen overnight. While there is a lot to consider and strive for, start small and take it step by step. If you only make one improvement this year, that's one improvement enhancing your event offerings over last year. Work your way through these best practices, keeping in mind that if you take the time to approach event management smartly, you'll have:

- › More funds to invest in your facilities, students, employees and technology
- › More engagement from your students and community, leading to better relationships and increased retention
- › More repeat renters, which fuels funds and engagement
- › More communication and less hassle among your team, stakeholders and community
- › More compliance and safety

You don't have to achieve it all at once. The important thing is that you simply start somewhere. And the best way to start is with an [effective event management system](#) that automates, stores, organizes and tracks your event procedures. Consider investing in an event management system that can optimize your team, improve your events, and better serve your students and community.

Best Practices for Event Management

- › **Streamline Your Event Management Process**
- › **Engage Your Community**
- › **Collect Funds to Reinvest into Your Organization**
- › **Mitigate Risk and Host Safe Events**
- › **Become More Data-Driven**

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