Block 1 – 2014 – Calendar Solutions Team Block Project

Please find the report for the 2014 Block 1 Project: Campus Calendar Solutions.

Charge

The team's charge was to develop appropriate procedures and policies to accompany the campus events, calendar, and room reservation management software system to ensure effective implementation college-wide.

As we strive to support our mission of providing the finest liberal arts education in the country, our campus culture must be vibrant and collaborative. With the selection of a new software system to address events management on campus, it is relevant to note that even if integrated to its complete functionality, no computer product will make an impact if its not aligned with effective policies, procedures, and practices. Thus, this project team worked to develop recommendations on that front in order to provide guidelines for our campus community to use this software to its fullest potential to improve events on campus, boost attendance, and create opportunities for collaboration and dynamic interaction in event planning and management.

Additionally, with the implementation of a new calendar and events management software, the college has an ideal opportunity to look critically at the function of event management not only to improve the function from what has been done in the past, but also to explore the potential to do something completely different.

Overview

The committee first met Sept. 9, to develop outcome expectations and identify the information needed to best inform work to advance the team's charge. Prior to the start of the project, a larger group (though made up of many of the same individuals) completed a comprehensive research, demonstration, and interview process to identify the software system that would best meet CC's needs for events management. Once the software, Ungerboeck, was selected, the need was identified to establish policies, procedures, and best practices to accompany software implementation and develop a more effective and efficient events management function for campus. The team convened in the second week of Block 1 and throughout the next four weeks researched all college spaces and venues, compiling a list of venues and the individuals responsible for managing them, developed elements of a "job description" for campus venue managers, created specific categories for all events and considered appropriate approval processes associated with each, discussed how events affect various departments on campus, and explored how to establish effective practices for event planners and organizers.

After significant discussion on each of those issues, the team concluded with lengthy dialogue around how to best establish an approval process and guide management

of campus events, encouraging collaboration and building a foundation upon which to build successful events from start to finish, while also addressing needs for efficiency of process, effectiveness in planning, and coordination of all support services related to events on campus. Subsequently, research was conducted to determine best practices in event management to establish options for organization of the event management function and coordination of individuals and entities involved in that process. Out of that came three key components of this recommendation:

- Reimagining the campus's event management function
- Refining the role of venue manager
- Providing enhanced support for major campus events through an Events Summit team/process

Events Management – Office of College Events

In current practice, an inefficient distribution of offices and duties make up the event management and room reservation process. In fact, six different positions currently include some component of event management in the job description, and that does not include the registrar, the role that currently schedules academic spaces. Now is the opportune time to merge all of the people working on events, registrations and reservations in various components and capacities, allowing more efficient use of existing college resources.

One option would be to pull all of those individuals together into one office, enabling them to work as a team, to make decisions and to have the authority and responsibility to say no when appropriate, the management of college events could occur in a more effective and efficient manner. In the existing process, that capacity is not present.

In researching other institutions' organizational structure related to events, the terms Events Services and Office of Events Management were often used. While several examples are provided, there was not a hands-down model that meets all of our unique needs, but this is the chance for CC to create something even better. Here are several sites for reference:

Events and Engagement: http://supporting.colostate.edu/events/
Events Office: http://www.wellesley.edu/events/eventplanning
Office of Events and Summer Programs: http://www.bowdoin.edu/events/
Office of Special Events: https://www.saintmarys.edu/events
Office of Major Events: http://www.virginia.edu/majorevents/
Office of Events and Catering: http://www.conncoll.edu/events/office-of-events-and-catering/

It seems most appropriate that this office should grow from the current Director of

College Events position, but there is flexibility in the recommendation to strategically use existing resources more efficiently. Understandably, this would create a significant shift culturally and functionally related to events, space, and priorities on campus. A determination of whether specific spaces of designated priorities need be discussed. Venue managers could remain as consultants and experts related to specific space, but the Office of Events would make all final decisions. Regardless, an Office of College Events would need to be collaboration-minded in order to manage this significant change in culture and process. However, because this would be a significant change for the institution and may require some additional resources, some other aspects of the recommendation may be more feasible in the initial software implementation process. Regardless of the decision of leadership now, the group acknowledges the value of revisiting this option once the new software has been in effect for a few months. This would allow us to see what issues the software resolved, and what issues remain to be solved by more clear policy, process, and organizational changes.

Venue Manager

There is a need for better training on event planning in order to set up events to be successful, whether that is defined by attendance, impact on attendees and participants, influential with the target audience, or some other specific measure of success determined by the planner. That training and support should be part of the venue manager role, in which the individual serves as the expert on event planning, as well as on the event management software and its role in the planning process. Currently, the college has more than 40 designated 'venue managers.' (See attached Venues, Managers, and Use document.) This format as created proprietary culture of ownership around college space, a dynamic that inhibits collaboration and efficiency, and which fails to provide support, authority, or clear expectations for those managing the spaces. The team recommends revising this format to work more strategically with the Office of College Events, or the individuals managing events in their various roles on campus if the office has not been convened, and work as a cooperative team to oversee all college spaces, have the authority to make event planning and management decisions, have the expertise to guide and support event planners, and have knowledge about all college venues. Additionally, more localized or site-specific venue managers may also continue in a role to oversee scheduling in their space and maintain a first priority in booking of specific spaces, serving as a go-to contact for the lead venue managers in understanding space-specific requirements.

Lead venue managers would meet monthly to debrief past events, discuss how events are managed and disseminate information more broadly to event planners and local space managers. They would work as a team to make decisions on approval of events and spaces, providing a more effective method of authority, as opposed to a single decision-maker.

The lead venue managers would also provide guidance as advisors in the event planning process, with the authority to approve or deny various steps in the process. They guide planners from start to finish in the process and provide contacts for venue-specific details and questions, delegating pieces of the process to the site-specific managers and connecting planners with additional support services when needed. To assist in the effective planning of events and delegation of resources and support, lead venue managers will also assist in guiding all event planners to assign each event into one of seven specific categories. (See attached document Policy Event Categories.)

A suggested make up for lead venue managers would be seven individuals representing: academic departments, athletics, performance spaces (dance/theater and/or music) Worner Campus Center, President's Office, conferences, and student/residential life. Additionally, a more detailed description of the role of lead venue manager was developed by the team to provide guidance and set expectations for those in that position. (See attached Venue Manager Role document)

Events Summit

This scenario would be most relevant should the college opt not to reorganize the entire events management function on campus. It could help restructure the current system to be more effective. The events summit would serve as a clearinghouse for all major college events. Its aim would be to promote collaboration across campus, encouraging, if not requiring, intentional thought and planning for events, and help facilitating a more efficient and effective planning process. It will also serve in assisting in the transition to an Office of College events, enabling greater participation and input into the process, potentially making the change more palatable for the campus community.

All events categorized as advanced or multi-day (see attached document Policy Event Categories) would be required to participate in the Events Summit. Not only would this serve as an approval process, but it would also enhance support for the major events on campus and allow key players in event management to better understand the big picture of events on campus and enable coordinated planning.

The events summit would be led by a representative from the Office of College Events, made up of all lead venue managers (or a contingent of the seven individuals), along with representatives from the student body, campus safety, facilities, and audio/visual areas of the college. Additionally, other event- or space-specific "experts" may be invited to join the regular meetings based on specific events being presented. This group would meet twice a month (initially, though may be adjusted to meet the need) to review events with event planners and provide a clear process for event planning and management. The members of the summit would also establish event priorities, i.e. certain campus traditions receiving

priority, other considerations for college-wide planning, etc. The initial recommendation is for this to be a campus committee, but an events management office is a best practice at other colleges and universities.

Planners would submit events for review at the summit one month in advance for faculty and staff events, two weeks in advance for student events. The events summit representatives will serve as experts to talk through the event step-by-step to ensure successful planning. The new software program will assist in getting many details inputted in the initial stages of planning, and the event summit members will provide a point of contact for event planners as they move through the process.

The project team recommends the events summit take on the task of drafting the following necessary components of the process:
- A specific rubric for event needs and campus expectations in determining what events receive priority in planning, to share college-wide to guide event planners
- A frequently asked question document for planning each level of event – a guide to make the process clear and less daunting
- An intentional mentoring process and/or event planning sessions for students and other key event planners

Conclusion

The Block Project Team recommends the initial implementation of these changes begin in alignment with the implementation of the events management/room reservation software. Additionally, an extensive communications and outreach campaign about these changes is necessary to inform all impacted stakeholders and address any conflicts, concerns, or challenges. The committee submits these for consideration and is happy to answer questions or help facilitate this transition process.

Submitted by Block Project Team Members:
Stormy Burns
Nick Calkins
Lynnette DiRaddo
Bethany Grubbs
Karin Henricksen
Don Herbst
Ted Lindeman
Barbara Mitchell
Andy Obringer
Brenda Soto
Karen To
John Wallace
Stephanie Wurtz

Brian Young
Rita Zook