• 2015 Facility Use and Cost Recovery Study
• Cost Recovery Findings
• Cost Recovery Champion: A Case Study
• Cost Recovery Best Practices
• KPIs You Should Know
About SchoolDude

The world’s largest educational database

- 6,000 education institutions
- 1.5 million professionals
- Serving 37 million students

In 2015 alone

- 15.7 million work orders
- 2.8 million IT incidents
- 6.5 million events
- $1.5 billion utility expenses managed
Approximately **82%** of Districts Lose Money on Community Use

- How well are you recovering costs for community use of your campus?
  
  *(How you responded)*
  
  - **25%** Not scratching the surface
  - **57%** Recovering some of our costs
  - **15%** Recovering most to all of our costs
  - **3%** Recovering more than our costs, allowing us to fund other programs
South Carolina Schools Success with SchoolDude - Events

- # of Events: 33,902
- # of Hours: 14,323
- Weekend Hours: 2,254
- Tasks Generated from Events: 28,425
- Amount Invoiced: $766,724
- # of Invoices: 371
- # of Work Orders/Incidents Generated from Tasks: 5,608
- % Invoice Amount Collected: 67%
Analysis of 1,700+ education institutions
- 10 years of historical data
- 43 Million Events
- $400 Million recovered

Focused on how educational professionals are coping with
- Facility scheduling
- Demand for community use of schools
- Recovery of costs to support community use
43 Million events from 2004-2014 on the SchoolDude platform.
Community Use Objectives

What phrase best describes your district’s policies towards the scheduling of your facilities outside of normal educational needs?

- Our goal is to fully maximize the use of facilities to better serve the community
- We allow the facilities to be used for only a limited number of extracurricular uses
- We try not to use the facilities for anything other than the district’s education needs
Community Use Demand

At one event/student/year, do you know what the impact is on your facilities?
## Community Use by Enrollment Range

<table>
<thead>
<tr>
<th>ENROLLMENT RANGE</th>
<th>AVG TOTAL EVENTS 2014</th>
<th>AVG EVENTS/STUDENT/2014</th>
<th>TOP 20%</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;1,000</td>
<td>1,018</td>
<td>1.77</td>
<td>2.42</td>
</tr>
<tr>
<td>1,000-2,499</td>
<td>2,132</td>
<td>1.20</td>
<td>1.86</td>
</tr>
<tr>
<td>2,500-5,000</td>
<td>3,506</td>
<td>0.95</td>
<td>1.49</td>
</tr>
<tr>
<td>5,000-14,999</td>
<td>5,949</td>
<td>0.71</td>
<td>1.23</td>
</tr>
<tr>
<td>15,000-24,999</td>
<td>10,354</td>
<td>0.53</td>
<td>0.85</td>
</tr>
<tr>
<td>25,000-49,999</td>
<td>15,079</td>
<td>0.43</td>
<td>0.68</td>
</tr>
<tr>
<td>&gt;50,000</td>
<td>34,582</td>
<td>0.37</td>
<td>0.55</td>
</tr>
</tbody>
</table>
Let’s Total the Potential Costs

A district with 8,000 students and 8,000 events/year, invoicing an average of $15/student generates $120,000

To support those events, how much did you spend on:

- Staff time (scheduling, coordination, approvals and cost recovery)
- Wear/tear/repair
- Custodial costs
- Energy costs
Behind the Scenes

What is the average time spent per event by each staff member in minutes?

<table>
<thead>
<tr>
<th>Staff Member</th>
<th>Min</th>
<th>Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>School Administrator</td>
<td>5</td>
<td>Collect requirements, check calendars, get approvals, manage changes</td>
</tr>
<tr>
<td>District Coordinator</td>
<td>5</td>
<td>Coordinate with staff to support event, approve, get other approvals</td>
</tr>
<tr>
<td>School Finance</td>
<td>10</td>
<td>Check insurance coverage, create invoices, send invoices, track payment</td>
</tr>
<tr>
<td>Energy Manager</td>
<td>5</td>
<td>Do BAS overrides per event</td>
</tr>
<tr>
<td>Food services, IT, other</td>
<td>5</td>
<td>Check availability, quantity</td>
</tr>
</tbody>
</table>

**TOTAL 30**

30 minutes per event = 4,000 total hours annually (events * hours)

At $25/hour, an 8,000 student district spent $100,000
What is the annual wear/tear/repair due to events?

- AS&U states on average districts spend up to $500 per student for M&O on buildings every year
- Assume $250 as a median and say that 1.5% of M&O goes to wear and tear due to facility events

$250 M&O cost per student = $2,000,000 M&O spend

At 1.5% of M&O costs, you spent $30,000

Example is using 8,000 events per year
What is the annual custodial cost?

- Average of 1 hour of custodial time for each event (setup, breakdown, clean up, lock/unlock and other services)

1 hour per event = 8,000 total hours annually (events * hours)

At a $25 per hour loaded labor rate, you spent $200,000

Example is using 8,000 events per year
Behind the Scenes

What is the annual energy cost associated with events?

- Cost for energy typically ranges from $120 to $300 per student
- Most districts say community usage increases utility cost 10% to 20% or more

$150 energy cost per student = $1,200,000 in total energy expenditure

At 10% of energy costs, you spent $120,000

Example is using 8,000 events per year
Let’s Total the Potential Costs

A district with 8,000 students and 8,000 events/year, invoicing an average of $15/student generates $120,000

But you spent:

- $100,000 – staff time *(scheduling, coordination, approvals and cost recovery)*
- $200,000 – custodial
- $120,000 – energy costs
- $30,000 – wear/tear/repair

$450,000 = TOTAL

$56/Student / year!
Cost Recovery Findings
To compare districts of varying sizes, SchoolDude developed a metric of “cost recovery/student” to allow comparisons across the size spectrum.

\[
\text{Total invoiced on annual basis} \quad \text{the number of students} = \text{cost recovery per student}
\]
Recovering Costs – What’s Possible

Calendar Year 2014

$27.75 - TOP 20%

$18.68 - AVERAGE
National Trend in Cost Recovery
## Costs Recovered by Enrollment Range

<table>
<thead>
<tr>
<th>ENROLLMENT RANGE</th>
<th>AVG INVOICED TOTAL 2014</th>
<th>AVG INVOICED/STUDENT/2014</th>
<th>TOP 20%</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; 1,000</td>
<td>$12,585</td>
<td>$27.13</td>
<td>$35.50</td>
</tr>
<tr>
<td>1,000-2,499</td>
<td>$34,752</td>
<td>$19.30</td>
<td>$30.32</td>
</tr>
<tr>
<td>2,500-5,000</td>
<td>$76,186</td>
<td>$20.39</td>
<td>$33.47</td>
</tr>
<tr>
<td>5,000-14,999</td>
<td>$161,347</td>
<td>$18.77</td>
<td>$29.97</td>
</tr>
<tr>
<td>15,000-24,999</td>
<td>$261,451</td>
<td>$14.25</td>
<td>$17.62</td>
</tr>
<tr>
<td>25,000-49,999</td>
<td>$461,221</td>
<td>$13.69</td>
<td>$21.86</td>
</tr>
<tr>
<td>&gt; 50,000</td>
<td>$1,328,954</td>
<td>$15.06</td>
<td>$23.70</td>
</tr>
</tbody>
</table>
Cost Recovery by District

Districts in the 90th Percentile

OREGON
Sisters School District

WISCONSIN
Strawwood School District
Miocene - Thinsville School District

MICHIGAN
Whitmore Lake Public Schools
Lake Orion Community Schools

ILLINOIS
Lake Forest District 67 & 115

MASSACHUSETTS
Plainville Public Schools
Bellingham Public Schools
City of Newton Schools
Reading Public Schools
Woodburn Public Schools

CONNECTICUT
Regional SD #16 Middletown

NEW YORK
Clarkstown CSD
White Plains CSD
Cheverus CSD

NEW JERSEY
Englewood BOE
East Brunswick
Koelworth Board of Education
North Brunswick Township
Hopewell Valley Regional School District

PENNSYLVANIA
Upper Saint Clair School District
Great Valley School District

DELAWARE
Appoquinimink School District

VIRGINIA
Felka Church City
Public Schools

CALIFORNIA
Tahoe Union HS District
Yolo County Office of Education
Campbell Union High School District
Alhambra Unified School District
Laguna Beach USD

TEXAS
Eanes ISD

MISSOURI
Kirkwood R-VII

NORTH CAROLINA
Chapel Hill-Carrboro City Schools

Intelligent Operations for Education
Approximately 82% of districts lost money on community use...What are the obstacles to invoicing and recovering community use costs?
Obstacles to Recovering Community Use Costs

- No school board support: 54
- No knowledge of how to invoice: 61
- Don’t know how to introduce a new process system-wide: 110
- No process in place: 126
- Not sure where control of the process belongs: 137
- No knowledge of how to get faculty/staff to embrace new system/process: 145
- No automated scheduling solution: 172
- No knowledge of how much to charge: 185
Common Problems that Occur in the Scheduling Process

- Custodian was not notified: 146
- Heating/cooling systems are not overridden: 152
- Coordination problems among schools: 158
- No reports are available for board and staff: 183
- Time wasted trying to manage the process for each event: 247
- No one knows the cost of an event: 251
Paper, spreadsheets, calendars, and email are not efficient in 90%+ of educational facilities

- Multiple schools
- Multiple buildings/venues
- Multiple setups/services
- Multiple events
- Multiple calendars
- Multiple requestors
- Multiple approvers
- Multiple notices/follow-ups
Too many parties and processes are involved for communication, task assignments, and cost recovery

- Custodial
- Maintenance
- Technology & Audio Visual
- Food Services
- Athletics
- Multiple Site Contacts
- District Office
- School Office
- Community
A facility scheduling solution should:
• Enable coordinators to view facility use calendars, check availability
• Automatically route usage requests to approval managers
• Automatically create invoices based on fee tables
• Automatically email event service providers regarding event setup
• Track contact information for groups using facilities, including permits, contracts, and insurance policies
2015 Cost Recovery Study: What We Learned

A facility scheduling solution should generate reports on:

- Area/room usage
- Services used
- Actual facility usage costs
- Invoice/payment status
- Organizations on-site
Cost Recovery Champion: Case Study
Facility Use and Cost Recovery Champion

Orange County Public Schools

Business Challenges

- Improve inefficient scheduling process
- Develop a global view of facility schedules
- Track facility usage and fixed costs
- Eliminate double booking
- Revise inconsistent fee schedules and reduce uncollected fees
- Reduce District’s liability risks
- Improve internal and external communication
Facility Use and Cost Recovery Champion

Orange County Public Schools

Results

• Developed a system to view all district wide events on a single centrally located calendar in real time
• Established a consistent, fair process for managing facility usage requests
• Improved response time for facility usage requests from days to within minutes
• Provided a standardized method to verify and document “certificates of insurance”
• Provided a standardized method to document completed “facility use agreements”
Cost Recovery Best Practices
Best Practices from Cost Recovery Champions

1. Distribute event management
2. Automate the process
3. Start small and gain buy-in
4. Recognize that leadership is key
5. Build support with principals and assistants
6. Recover costs
7. Develop tiered fee structures
8. Improve invoice management
9. Establish presence at events
10. Collaborate with peers and across departmental teams
1. Distribute event management

- Establish method to allow decentralized decision-making
- Establish ownership over specific tasks, such as event conflicts
- Emphasis on “group” decisions
- Enabled through a multi-user, multi-level system
Best Practices from Cost Recovery Champions

2. Automate the process

- Improve communication
- Increase visibility
- Ensure that nothing is forgotten
- Prevent duplicate entries
- Notify the right people at the right time
3. Start small and gain buy-in

• Begin with only certain types of rooms or certain schools
• Gain support and buy-in from key decision-makers
• Allow positive word of mouth to sell the idea
4. Recognize that leadership is key

- Support for the new plan must come from all key decision-makers.
- Support of policy that establishes fee structures and cost recovery philosophy throughout the district.
- Crucial to the success of your cost recovery program.
5. Build support with principals and assistants

- Key to success if they understand how it positively affects them
- Better visibility
- Lowered risk
- Improved security
- Less work
Best Practices from Cost Recovery Champions

6. Recover costs

The consensus among Facility Use Campus Champions is that school systems should at least estimate their costs for:

- Administration of events
- Custodial Services
- Utility Usage
- Facility wear and tear
7. Develop tiered fee structures

Most successful districts establish simple fee structure for types of community groups using facilities. For example:

• **Category 1**: school groups – no charge

• **Category 2**: non-profit 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
8. Improve invoice management

- Ensures accuracy
- Increases likelihood of repeat usage
- Improves service to school faculty and community users
9. Establish a presence at the event

Having a custodian on-site during events reduces damage to property and equipment and protects the district.
Best Practices from Cost Recovery Champions

10. Collaborate with peers/departments

• Network with peers and cross-departmental teams to learn what others are doing and share best practices.
• Establishing a cross departmental team ensures all stakeholders in the process have a voice.
Community Use KPIs You Should Know
### Number of Events Per Student Per Year

<table>
<thead>
<tr>
<th>What is it?</th>
<th>Total number of events scheduled over the past 12 months that's Approved and Activated, excluding Cancelled events, divided by the total number of students.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Why is it valuable?</td>
<td>This benchmark allows you to estimate the impact Community Use has on your facilities and also provides a baseline to how much your facilities are being used.</td>
</tr>
</tbody>
</table>

![Number of Events per Student per Year](image)

**Kpi Key:** ▼ You △ Your Peers in Public K-12 Schools  **KPI Category:** Operational Indicator
### Event Requests from Request Portals

<table>
<thead>
<tr>
<th>What is it?</th>
<th>Percentage of event requests submitted from CommunityUse, MySchoolBuilding &amp; Site Admin request portals for a 12 month period.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Why is it valuable?</td>
<td>Empowering customers to submit requests online improves the customer experience and reduces administrative overhead and data entry. This metric gauges efficiency by measuring how well you’re leveraging online requester portals.</td>
</tr>
</tbody>
</table>

#### KPI Key:
- **You**: ▼
- **Your Peers in Public K-12 Schools**: △

**KPI Category**: Leading Indicator
Average # of Days to Activate Permits

<table>
<thead>
<tr>
<th>What is it?</th>
<th>Average cycle time (number of days) between community facility use requests and approval of the community facility use request.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Why is it valuable?</td>
<td>This metric measures can highlight opportunities to streamline the approval process.</td>
</tr>
</tbody>
</table>

Average Number of Days to Activate Permits

Kpi Key: ▼ You △ Your Peers in Public K-12 Schools  KPI Category: Process Indicator
Community Use KPIs You Should Know

**Dollars Invoiced Per Student Per Year**

<table>
<thead>
<tr>
<th>What is it?</th>
<th>Total amount invoiced for rentals in a one year period divided by the total number of students.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Why is it valuable?</td>
<td>This metric is an indicator to see how well you’re recovering costs incurred for the use of your facilities</td>
</tr>
</tbody>
</table>

**Dollars Invoiced per Student per Year**

- **Low**: $15.33
- **Good**
- **Great**
- **High**

**KPI Key:** ▼ You △ Your Peers in Public K-12 Schools **KPI Category:** Financial Indicator
Community Use KPIs You Should Know

Payments Received vs. Total Invoiced

<table>
<thead>
<tr>
<th>What is it?</th>
<th>Total payments received divided by the total amount invoiced for community facility use requests.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Why is it valuable?</td>
<td>This metric is an indicator of how effective you are at collecting payments for events that are invoiced.</td>
</tr>
</tbody>
</table>

Payments Received vs. Total Invoiced

Kpi Key: ▼ You △ Your Peers in Public K-12 Schools  KPI Category: Process Indicator
Resources

- Facility Use Cost Recovery White Paper
- Facility Use Discussion Group
- Sample Fee Tables
- Best Practice Webinars
- Industry Benchmarks and KPIs
- Bellingham Public Schools Case Study
Questions?

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