



SUCCESS STORIES

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Glencoe School District #35 RevTrak Software Out Performs Credit Card Terminals

Situated on the beautiful shores of Lake Michigan twenty miles north of Chicago, Glencoe is a historic residential community of about 8,500 people. Glencoe School District #35 is a K-8 district with three schools, preparing students for New Trier High School, one of our nation's foremost high schools. Glencoe made a significant step forward in simplifying their fee payments this past year. Here is their story:

Bookkeeper Judée Koppenhoefer had already been allowing parents to pay student fees with credit cards for a number of years with a terminal, just like one you might see in a restaurant, when I originally called her. When offered the opportunity to examine RevTrak, a network based software solution for processing credit card payments for student fees, Judée agreed and also called in Administrative Technology Coordinator Marilyn Roland for assistance in making an evaluation. Hmm, a solution specifically designed to meet the accounting needs of schools or a solution designed to meet the accounting needs of restaurants, Judée and Marilyn immediately saw the benefits. After getting approval from Business Manager Ron Chilcote, RevTrak was implemented in February of 2002.

At the IASBO convention in April Marilyn stopped by our RevTrak booth to report that Glencoe was thrilled with RevTrak and was already experiencing significant benefits, both in a lessened work load for Judée and greater customer service for the parents. How much time were we really saving Judée, a 12-year veteran in the business office? We didn't know until September's Registration. "Last year I worked until 9:00 pm on a number of occasions during Registration, this year I go home on time (3:30 pm) with every single transaction processed, even on the day I processed \$20,000!" A 5-1/2 hour/day timesavings, now that's impressive!

Any downside to RevTrak? For Judée, yes. B Judée, that is one problem even RevTrak's great tech staff cannot solve.

Northfield Township High School District #225

Part I: The 24/7 Cashier

"I want to take bus payments on our website" are the words that in many ways changed the future for RevTrak. We were in Dr. Craig A. Schilling's office October of 2001 to tell him about RevTrak (our program for processing electronic payments of student fees specifically designed to meet the needs of schools) and hear his vision for the future. Instinctively we knew this was a great idea but we sheepishly had to admit we weren't "there" yet.

By the end of February we were "there" and approached Northfield again. Working closely with their excellent staff, we began constructing a web solution that included all of their requirements. Parents not only had to easily link seamlessly from www.glenbrook.k12.il.us to our secure web server, they had to agree to the bus rules, select a bus route and stop, enter their student's ID number, designate whether they were under or over 1.5 miles (the cost rose if they were under), and then check out. Just thirty very hectic days later, April 1, 2002, Northfield was processing bus payments on their website, through their 24/7 Cashier (the web store).

So what has been the response of the families in the district? The good news is that parents like the idea too and are willing to use it! Here is how it works: every time a purchase is made Craig's administrative assistant receives an email from the website advising her of the purchase. She accesses the order number for all the essential information, marks the student paid, and sends out the bus pass. Benefits to her include: less mail to open, fewer checks to process, less NSF's, less parents coming in to the district office to make payments, etc. After reviewing my draft of this email she also asked me to let you know that she is available to be a referral for us and "you know that I will give a glowing recommendation - it's easy to do when you're telling the truth! As an aside I don't know if you want to mention it or if it might seem like you are tooting your own horn, but the tech support and the support I receive from you are one of the best things about RevTrak and I think people should know that. After our experience with . . . I would never get involved in any new endeavor without first knowing the strength of the support system. For me, RevTrak has been terrific!" She humbly did not want her 15 minutes of fame so you'll have to call me if you want to talk to her in person.

So what was next on the Schilling list? Food Service. Our mission was simple: make it easy and seamless for parents to purchase transportation AND food service for multiple students by ID number with a single checkout, even when the students attend different schools. The cafeteria needs to receive an email when a food purchase is made, and Craig's assistant needs an email confirmation for every bus pass purchased. No problem. The Northfield Super Store is online and ready to take orders.

The cafeteria staff appreciates the web store because processing checks and counting cash is a huge time consumer for them. They simply check their email to find out who purchased food service, and then follow their usual process from there. With the web transactions there is no money to handle! Parents like it because they don't have to send cash and checks to school, they can drop money directly into their student's lunch account and know it wasn't spent someplace else. Order volume is increasing as more parents discover the convenience of ordering online.

The 24/7 Cashier via a school web store will become the new standard for districts across the nation, just wait and see!

Northfield Township High School District #225

Part II: Automatic Payment Plans

Long payment lines, hours spent counting cash, preparing check deposits, long payment lines, recounting the cash, NSF's, trips to the bank (where the cash is recounted again), have I mentioned long payment lines? Joanna Kereakes, Sodexo General Manager for Glenbrook North and South High Schools mentioned them often when we first met with her last spring. Dr. Craig A. Schilling, Assistant Superintendent for Business at Northfield High School District 225 asked us to meet with her after we successfully launched bus transportation payments on the district website (described in Part I). Could we do the same for food service?

Sure, and we did. But Joanna needed a more comprehensive solution. Not every parent was willing to make payments on the website. Perhaps a computer and Internet access weren't convenient, or they'd never purchased anything online and they certainly weren't about to start; all we know is that not everyone was comfortable with that option.

Automatic Payment Plans were the answer. When we showed Joanna the authorization form and explained the once per month process of using our RevTrak software program for processing electronic payments, she immediately saw the potential benefits. Here's how it works: the parent fills out a form supplying all the key information needed, including their credit card number and expiration date, and how much money they want deposited into their student's lunch account each month. We enter the information into RevTrak along with the first month's payment. Using the SSL layer of the school's Internet connection, RevTrak authorizes the transaction in under 2 seconds. The student's lunch account is updated and the money is sitting in the district bank account two business days later. One month later, a repeat transaction is done requiring about 15 seconds of time, the student's lunch account is updated, and the school has the money in two business days. One month later . . . you get the picture. I helped Glenbrook South do their first set of repeat transactions for October and we pushed over \$12,000 through processing 118 transactions involving about thirty minutes of actual work. How long does it take to process \$12,000 in cash and checks?

Students ALWAYS have lunch, and mom/dad only have to think about lunch ONCE for an entire year, when they sign the form. A great solution for busy parents! The cafeteria benefits with shorter lines and less cash/checks to process. For Joanna's staff, web purchases of food service and Automatic Payment Plans are a solid step forward.

Bloomington Public Schools Innovative Revenue Raising Strategy

Revenue shortfalls. Almost every time I talk to school business managers I get another earful about the levy that didn't pass or the latest decrease in state funding. So when I recently heard a fascinating revenue enhancement success story, I decided to pass on the great idea! Here it is:

The home of the Mall of America is Bloomington, Minnesota, a long time RevTrak client with 11,000 students and 15 schools. Community Education has been a favorite tool in Minnesota for creating extra revenue for some time now, but Bloomington has figured out how to leverage the resources of their two high schools to an even greater advantage. Why not open these gyms, weight rooms, indoor tracks, golf cages, batting cages, etc. to residents as Community Activity Centers for limited hours on nights and non-school days? Surely residents are willing to pay a reasonable price for convenient access to exercise facilities. And guess what? They are!! Membership Coordinator Cassie Merhar explained, "Bloomington is a progressive district and raising revenues by opening our facilities to the community as an activity center is one more step in the right direction." Check out www.revtrak.com/bloomington to see the specifics of what they offer (their full website is www.bloomington.k12.mn.us).

Come on, do the headaches justify the cost? Their first Community Activity Center opened in December 2001, their second site opened in September of 2002. In 13 months of operation they already have over 2500 members. As profitability grows, the Activity Centers simply absorb more and more of the costs of maintaining these facilities. Residents are not being asked to foot a higher tax bill, they are invited to become members of an activity center which will improve both the school and their own personal health. Everyone wins in this scenario.

Here's the short history: Bloomington was one of the districts who asked us to find a software solution for credit card payments that fit the accounting needs of schools and was soon one of our beta sites; restaurant style swipe terminals just were not meeting their needs. Bloomington Community Ed has used RevTrak now about 5 years, up until recently collecting registration fees via credit cards just through the mail, on the phone, and in person for their 40,000+ participants. After we showed them just how great online registration for bus transportation and food service was at Northfield Township High School District 225 in the northern suburbs of Chicago, Bloomington knew they had an easier way to collect all this extra revenue. Cassie took this one step further, "Taking membership payments on the web not only saves us and our patrons time, but a web presence provides valuable advertising we believe will raise our memberships and therefore revenues."

Kudos to Bloomington for their creative revenue raising strategy!

Lakeville Area Public Schools Refunds

Every time I pick up the phone to interview the next RevTrak success story I have a wave of fear: what if they don't say anything new? What if they don't highlight some special NEW reason on how RevTrak has made their lives easier?

You'll laugh when you hear this one: Lakeville Public Schools loves RevTrak for all the usual reasons, but they really love it for REFUNDS!!

One of our newer districts, Lakeville started taking credit cards in the district with RevTrak in December of last year, mainly for community education classes. The original intention was twofold:

1. Offer a valuable payment option, both with a web store and "in-house" credit card processing, in hopes that more people would sign up for community ed classes and thereby increase revenues.
2. Reduce cash and checks in the district.

While it is too early to have hard facts and figures, Patty Streiff, the Purchasing Director for Lakeville, assured me the district, school board, and community have all had a positive response to RevTrak. Enrollment is up, cash and checks are "down", and the future looks great!

But the ease of REFUNDS was an unexpected benefit and is saving the district valuable time and money. If a refund needs to be issued (for a move from the district, class canceled, etc.) here is the normal process:

1. A district employee has to write up a request for a check.
2. The request is submitted to the officer manager.
3. The office manager submits it to the program director (or some other person who signs verifying the refund).
4. Then the office manager submits the request to the district office so accounts payable can enter the request into the finance system.
5. Next the accounting supervisor reviews the refunds once again to make sure they are appropriate.
6. Finally a check is cut, an envelope addressed and stamped, then mailed.

So, I asked, what happens with RevTrak? Well, a refund requires all of about 15 seconds of one person's time in RevTrak including printing a receipt to send to Patty for review. Because RevTrak handles the monthly journal reports for all credit card transactions, the financial accounting is covered automatically. But, where is the accountability built into the above six-step process? Oh, Patty said, no problem. Besides the fact that she receives hard copies of all refunds done, once per month she runs the RevTrak refund report and looks it over checking for evidence of fraud. Since the report can be sorted by card number or name, she looks for cards or people who seem to be getting too many refunds. If they were using credit card terminals this wouldn't be possible, but the RevTrak software it is easily done.

After I sent Patty a draft of this email to approve she also asked that I mention, "I do think another huge advantage to RevTrak is the fact that using credit cards reduces the bad checks that the district receives." For some districts this is a non-issue, but for others I have heard it is a huge concern.

Check out www.ce.isd194.k12.mn.us/register to check out the current Lakeville web store. The district has future plans to add more options to the web store for their K-12 schools.

Owatonna Public Schools Turbo Charge your District Web Site

My kids like to remind me that sometimes I'm a rotary dialer in a touch-tone world. Somehow it is always easier to do what I have always done than to embrace technology, especially anything that involves money. I still remember the first hundred times I had the opportunity to pay for my groceries with a credit or debit card. I didn't. Or the first hundred times I could pay for my gas at the pump. I didn't. But guess what, I now not only purchase my groceries with my credit/debit cards and pay for all my gas at the pump; I even use my credit/debit cards to make purchases online!

Apparently I'm not alone! Take schools for instance. It is truly amazing how successful school districts become cashiering credit card payments for registration, food service, athletics, community ed classes, etc., especially when they offer the capability to purchase securely right off their district web site. Information-only websites are transformed into e-commerce web stores receiving payments around the clock, seven days per week.

Take Owatonna for example. Owatonna Community Education's web store (www.owatonnacommunityed.org) had their grand opening for selling classes on-line late in the day on January 2, 2003. When the staff came to work the next morning they already had 12 web purchases for Community Ed classes. That means 12 less phone calls or envelopes to open; 12 less checks to process. Forty days later they had processed 97 web purchases. That's 97 less phone calls, 97 less checks to deal with, now we're talking productivity! According to Michelle Carsrud, we know we have the money, it is a done deal, we have one less piece of paper to process (the check), and it's been great! Registrations for classes are up over 36% from last September with very little advertising in a previous class catalog. The community was ready!

A little history: Owatonna started using the RevTrak software for processing payments using their high speed Internet connection during the fall of 2001. Just in that short amount of time, fully half of their phone/mail payments have come via credit card, and that was even BEFORE the web store came online. In a period of a down economy beginning in 2001, Owatonna has had their best ever revenue producing years.

Now, your district may not have a Community Ed., but isn't this a great example of the power of the 24/7 World Wide Web? Every district takes payments for something; why not seize the power of the Internet to be your 24/7 cashier?

At RevTrak we offer the affordable, comprehensive solution specifically designed for school districts. Check us out!

Winfield School District 34 Even Small Districts Benefit from eCommerce

Is your district bigger than 423 students? If so, keep reading!

Winfield School District 34 is a K-8 district in the western suburbs of Chicago (between Wheaton and West Chicago). With only 400+ students across three schools, most people would consider Winfield too small to enjoy the benefits of offering the credit card payment option to parents. The most people included RevTrak sales reps. We were wrong!

RevTrak came to Illinois in the fall of 2001 and Winfield was one of the first districts we visited. We were surprised to discover this small but progressive district already had a credit card terminal when much larger neighboring districts had yet to take that step. Patti Cain, the Business Manager of Winfield, felt our RevTrak software reporting capabilities (designed to meet the accounting needs of K-12 schools) were a huge improvement over her credit card terminal (designed to meet the accounting needs of retail establishments like restaurants) so in November of 2001, Winfield became our first Illinois RevTrak installation.

As a sales rep, Winfield was also my very first account, and in my humble and inexperienced opinion, this district was just too small to have much need for electronic payments. I could not have been more wrong! Winfield runs the Tiger Club Preschool Program and parents have to pay tuition on a monthly basis. When we suggested using an Automatic Payment Plan where parents authorize the district to charge a credit card once per month for tuition, Patti saw the benefits immediately. Now moms (with preschool children in tow) didn't need to stop in the Business Office to pay their tuition. Besides being a valuable courtesy to parents, this also meant the Business Office didn't have the distraction of moms and kids coming to pay in person, and to chat for a while. And, instead of processing all of those checks, Patti could process each credit card payment once per month in about 15-seconds. Winfield's credit card volume soon began to grow and this sales rep thought we were providing as much service for Winfield as they would ever need. I was wrong!

In April of 2002 RevTrak produced its first web store for Northfield High School District #225. It never occurred to me to call Winfield and ask them if they needed a web store, after all they were just too small! Wrong, wrong, wrong!

Check out www.winfield34.org, and select the Winfield Web Store from the menu on the left (second option from the bottom). Even a 400+ student district collects fees for a variety of different things. I show this web store to every single district I meet with because I think they did a particularly good job with Registration. Even clueless parents (like me!) can easily pay registration fees for a student CORRECTLY with the Winfield Web Store. Once in the web store, click on Registration, then Grades 6-8. First you will see the base registration fee that every student pays. Then there are four more options. Want to purchase milk for the year? If your student needs gym shorts or shirt, purchase them here. Finally, if your student is going to be part of the Before/After School program, pay the deposit. Fill out the student's information and then go to checkout (or also register other students). Isn't that easy?

In addition, a parent can purchase a school supply kit for each student (which means the PTO is making money), pay activity fees for clubs or sports, tuition for Tiger Cub Preschool, and finally, pay the Before/After School Care bill.

Isn't Winfield #34 an amazing story? This district may be small, but their vision is huge. Progressive practices like offering the credit card payment option, Automatic Payment Plans, and a web store offer even a small business office valuable labor savings.

Walk-In Registrations

"Last year we only had one credit card terminal, which could take up to 5 minutes to complete a transaction. We sometimes had 20 people in line." What was it like this year with RevTrak Express? "No lines!"

Everyone hates walk-in registrations. For the staff it means long days in a warm gym and a lot of stress. For parents it means waiting in long lines to get more books than they can carry and about 8 sets of initials, only to walk out totally depressed at the price of public education.

A number of Chicago area districts used RevTrak Express for their walk-in registrations this year including West Chicago CHSD 94, Warren Township HSD 121, Lake Forest High School, Aurora East High School, and Sycamore CUSD 427 just to name a few. Here are some of the comments I received:

"RevTrak is so easy to use, we did not train until 30 minutes before registration. The staff had no problems."

"Because RevTrak is network based software, we could have as many stations taking credit cards as we wanted. We set up four, but could have easily gotten by with two because RevTrak is so fast."

"Credit card volume was up."

"With the great reporting it was so easy to 'tie-out' each cashier and know we were right, down to the penny."

"Just think of all the checks we don't have to deposit, or find out they are NSF!"

"SO convenient!"

"Refunds were easy when we needed them"

"Parents loved how fast it went."

"It was great being able to go back and print an extra receipt if we needed to."

"This is way too easy."

Several of the districts were collecting serious money, even achieving or topping \$100,000 in only one day. Just think of all the work they didn't have to invest getting that deposit ready for the bank! Because of RevTrak's great reporting, a solid audit trail for every single payment could be traced, without the investment of the time and energy of an already tired staff. And, the car that drove that deposit to the bank had \$100,000 less cash and checks in it. RevTrak brings confidence and control, less work for the whole staff, and less errors for business managers to sort out later.

Of course, not every district uses walk-in registration. We also had a number of districts using RevTrak for mail-in registration, and some using our online web registration, but those deserve their own success stories!

Harrisburg Public Schools Online Payments

Upon hearing the screams Harrisburg Superintendent Jim Hargens did what all good superintendents do, he leapt up from his desk to solve the problem in the outer office. A fire? An accident? A violent incident? More mold discovered in the walls? Nope. Administrative staff person Georgina Cavin was screaming because online orders were streaming in from the Internet. "It works! They did what I told them to do! What on earth do I do now?"

Let's be honest here. Excited responses are not uncommon in the district office when something new has been introduced; but they are rarely produced by joy.

Online food purchases went "live" late on the previous day so when Georgina came in the next morning, her email In Box was filled with orders. Regardless of what produces the screaming, calling tech support is always the first step. Still trying to come to life with his morning coffee, Mark Gebhard was wide-awake when he heard the screams on the other end of the phone. "Let's open the orders and process them." He calmly told her. And, step-by-step, together they walked through the process of opening orders so fulfillment could begin.

For Harrisburg, online payments were a home run. When I called Georgina to see how it was going for this story, she asked me to share the following:

1. Parents have told her that they greatly appreciate the availability of online purchases.
2. Parents find the web store easy to use.
3. Parents are returning to make more purchases.
4. New parents are visiting the web store every day.
5. Less checks and cash are becoming "lost" on the way to school.
6. The business office appreciates having less cash and checks to deposit.
7. Tech support has been super.

Visit <http://Harrisburg.RevTrak.net> to see an attractive, simple, clean, easy to use web store. Our thanks to Georgina and Harrisburg for letting us use their story!

The Future

Did you know that Pizza Hut began offering the ability to order pizza online way back in 1994? How on earth did the common home user even place a pizza order considering CompuServe, Prodigy, and American Online weren't even available until 1995? All I remember from those days is that our modem was so slow we might have starved to death before our shopping cart experience was completed. Plus, who in their right mind was putting a credit card number into cyberspace?

Fast-forward just 9 years to 2003. At our house we pay for everything, almost, online. In fact, I am irritated when I can't purchase online. It is just so much easier than writing the check, finding the stamp, addressing the envelope, and depending on snail mail. High-speed modems, DSL, and cable Internet service make the experience fast and secure sites (plus encrypted SSL) mean we can sleep at night. Look how far we've come!

Today, in 2003, it is common and expected for all districts to have websites. By 2010 it will be common and expected for all districts to also have web stores. We pay for everything else online, why not our school fees?

Innovative districts in Illinois (and other states) are already well on their way. Northfield High School District #225 started taking payments for bus transportation in April of 2002, and started a revolution. We now have 15 Illinois districts online and every single one has brought a new twist to the concept. Besides the usual registration, food service, and transportation, we have districts selling used computer equipment, season tickets, yearbooks, auto repair, P.E. uniforms, and calculators. Bill payments, athletic fees, adult education classes, driver's ed, you name it, if a school collects a fee or wants to make money, they can do it on their web store.

Some districts, like Harrisburg, experience great success from the get-go with online collections for various fees, others are much slower. So much depends on advertising, community connectivity to the Internet, ease of finding the web store on the district website, and incentives (offering a discount or other perk for paying online). Every journey begins with a first step; the important thing is just to get going. Success is achievable for everyone

However, the truth is that there are still people not surfing the Net. What if they want to pay by credit card by phone, mail, or in person? School districts need to have a complete solution that will serve the needs of ALL their parents.

RevTrak was specifically designed to meet ALL the needs of K-12 schools, online and "on-site". Why not check us out?