



Case Study: Granite School District

Granite School District Streamlines Accounting Procedures and Reduces Manual Work for Financial Secretaries

Background

The Granite School District is located in Salt Lake City Utah. The District is made up of 88 schools and manages around 10 million dollars of payments coming into the schools every year. Students at the high schools and middle schools pay for a variety of items throughout the school year, including course fees, sports participation fees, yearbooks, dance tickets and outstanding fines owed to the school.

Step One: Form the Committee and Evaluate Internal Needs

The project began when the high school financial secretaries approached the District hoping to streamline processes among all schools in the District and to meet their community needs of wanting to pay online for school items. Their existing program had been written by a local company for their schools and did not provide the scalability to grow with their community needs.

A committee was formed that included 3 principals, 3 high school financial secretaries and 3 district level personnel. The committee immediately conducted an internal needs assessment, evaluating existing practices, software and hardware. They quickly realized that all of their schools were using different procedures, software and hardware applications and that none of their applications were networked together to allow the District the oversight that they needed.

Previous Process:

- ▶ Some secretaries manually receipted to students
- ▶ Other secretaries used their Combinations program to receipt – which was built to track lockers at their schools
- ▶ All secretaries then had to manually enter daily sales into Quicken
 - ▷ This process sometimes took 5 hours a day (to enter all sales) depending on the time of year
 - ▷ Increased chances of manual error for secretaries
 - ▷ High levels of stress
 - ▷ Not much accountability – data could be edited/changed easily
- ▶ Not able to accept credit card payments at their schools

Customer at a Glance

Customer: Granite School District

Solution: Client Server, Tracks, SchoolBooks and WebStore

URL: www.graniteschools.org

“Our goal was twofold... to reduce secretary time and to be able to meet community needs and offer an online credit card payment option. Blue Bear Software was the best fit for our needs. It’s a complete accounting package with an integrated online payment solution.”

—Paul Hanson,
Director of School Services,
Granite School District

Case Study: Granite School District

“Financial accountability is extremely important to the Granite School District.

The financial secretaries are handling public money and we definitely need to account for EVERY dollar. We have a stewardship for the proper accounting of all money at the schools.

We chose Blue Bear software because it was an integrated system that would give our secretaries more accountability and reduce the chances of manual error.”

—Sherry Wilson,
Accounting Coordinator,
Granite School District

Step Two: Seek Vendor Referrals and Determine the Best Fit

The committee agreed on a set of robust features that would be required in a new software solution: reduction of manual workload on the financial secretaries, tracking of student payments, accurate report generation, better accountability and an integrated online credit card payment option for their community.

An RFP was posted in May of 2008 to a select group of vendors. The group narrowed down the search to the top three vendors for on-site demonstrations based on functionality, ease of use for the financial secretaries, and credit card payment capabilities.

The group settled on Blue Bear software from Active Network, Educate as their preferred software solution in June of 2008. According to Sherry Wilson, Accounting Coordinator for the Granite School District, “the accounting solution of Tracks, SchoolBooks and the WebStore was the obvious choice for our District. The software all works together and is a completely integrated solution that manages the flow of school funds with hardly any manual data entry and much more accountability.”



Implementation and Training

The Granite School district decided to implement the software as soon as possible upon choosing Blue Bear software. Their goal was to start the 2008-2009 school year with their schools all up and running on the software. The district worked with a Blue Bear Implementation Specialist to install the client on their servers and install at each school site.

The district decided upon the “train the trainer” approach. They had a Blue Bear Implementation Specialist come out onsite and train a select few users who had participated on the initial selection committee. The training included 2 days of onsite training for Tracks and then a month later, 2 days of onsite training for SchoolBooks. Training manuals for Tracks and SchoolBooks were provided to the secretaries so that they could continue to practice the training activities in the manuals on their own.

After onsite training was complete, Sherry was responsible for providing the training for the remaining 20 schools. Along with the training manuals that were provided by Blue Bear, Sherry created her own help manual which she calls the “Granite School District Guidelines.” She wanted to ensure that her secretaries were all following the same accounting procedures and to provide additional support for them while learning a new software solution.

Case Study: Granite School District

Results

Twenty-five (all 9 high schools and all 16 junior highs) of the Granite schools have been using Tracks, SchoolBooks and the WebStore for over a year and half now.

- ▶ Financial secretaries have seen a decrease in manual work by 2-3 hours per day now that they are receipting through Tracks and automatically importing transactions into SchoolBooks – No more manual entry of sales into Quicken.
- ▶ All schools have an online WebStore to allow parents and students to pay for school items and fees by credit card, reducing long lines for students and removing much of the cash handling at the school sites.
- ▶ Kennedy Junior High School had over \$24,000 in outstanding debts owed to the school during the 2007-2008 school year. This year, they are down to \$9,000 because they've provided the ability for parents to pay school fees/fines online by credit card.
- ▶ Taylorsville High School had a student pay off a fine that she'd had for over 2 years because they had the ability to put it on a credit card. They've also seen an increase in the percentage of students who pay their course fees – 92% this year versus 70% in past years.

“Blue Bear is the best program I've ever had. I love it! ”

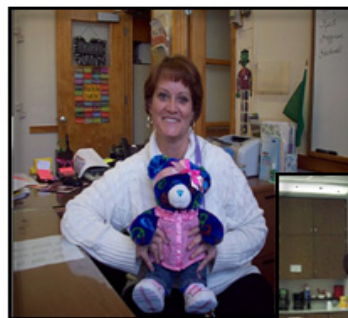
—Marilyn Hardman, Financial Secretary, Cyprus High School

“I think the online WebStore feature is PHENOMENAL. It really takes us into the 21st century. Next year is going to be a snap! I am very pleased with the way that the WebStore, Tracks and SchoolBooks communicate with each other – it makes the software so easy to operate! I have been very pleased with Blue Bear this past year.”

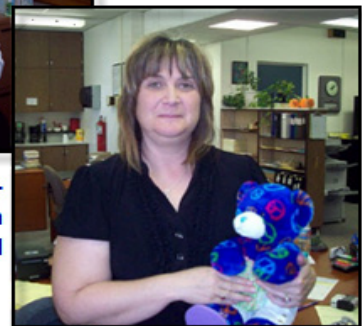
—Jennifer Vargo, Financial Secretary, Kennedy JH

“Whether one person or 500 people buy online, it takes me 5 minutes to reconcile all the payments! If 500 people stand in line, I'd be counting money for hours. The WebStore has cut my work in half!”

—Janice Johnson,
Financial Secretary, Skyline High School



**Jennifer Vargo -
Kennedy Junior High
School**



**Kris Carlson - Brockbank Junior
High School**

Granite School District Recommendations:

Implementation: Install the software as soon as possible. This will ensure that all users are up and running and feeling confident about using a new system. Change can be a scary thing for some people so the sooner you can get them using it, the better!

Training: Onsite training is ideal to ensure that your staff members are trained successfully and get up to speed quicker.

Support: Get individual support plans for each of your schools. According to Wilson “The support team is very knowledgeable. They are able to work with you to fix any problems that you have.”

Employees: Keep in mind that there will be a variety of skill levels among all the users at your schools. Some may need more assistance than others