

**Industry:**
JCC**CSI Software Deployed:**

Member Management
Front Desk Check-In
Point of Sale
Accounts Receivable
Inventory
Program Registration
Series Sales
Online Services
Scheduler

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Stamford JCC Case Study

Background:

The Jewish Community Center of Stamford, Connecticut (the “Stamford JCC”) has served the Stamford, Greenwich, Darien, New Canaan, Norwalk, Bedford and Pound Ridge area for more than 90 years. The Stamford JCC offers recreational, educational, cultural and social services to several thousand families and individuals each year.

Stamford JCC went live with CSI Software in March 2007. CSI Software replaced a 15-year old legacy system that is used by many JCCs.

The Challenge:

Legacy system was an open-item accounting system where members made payments against specific charges.

According to Barbara Merson, Assistant Executive Director and Chief Financial Officer,

“Each charge had a 4-digit code indicating the service provided, and the year the service was charged – and we had hundreds of codes. Our legacy system did not have built-in, automated credit card or EFT drafting capabilities, so these were handled in two separate software systems. Finally, our legacy system did not have an effective way of tracking scheduled future payments – only various workarounds, such as very basic fundraising features that tracked pledges.”

The combination of an open-item system, with many cryptic codes, drafting outside the system, and no consistent tracking of future payments, created many challenges for the JCC.

Barbara Merson explains: “Members often mailed in payments without clearly identifying which charges the payments were for. Our accounting staff often applied payments to the wrong charges, especially when working with the two separate systems for credit card and EFT drafting. The various workarounds for tracking future payments were not consistently executed. Our back-office procedures took far more time than they should have, and basic customer service suffered.”

“Because our legacy system treated future payment obligations as billable today, nearly all of our members received statements each month – even when they agreed to have their credit card or bank account charged by the JCC. Members found the legacy system’s open-item statements, especially those with many charges and payments, plus future obligations, to be confusing. And the frequent errors in applying payments to specific charges made statements even more confusing – and resulted in a very high volume of phone calls for our accounting staff to deal with.”

Customer service, efficiency and financial controls needed to be improved.

The JCC wanted more out its CSI Software implementation, than just an upgrade from its legacy system. The JCC wanted to conduct a careful, rigorous, and analytical systems implementation process, that would improve efficiency, customer service, financial controls, and that would ensure that the JCC was capturing and using data needed to run its business.

According to Barbara Merson, “The program registration features in our legacy system were very limited, and difficult to use. As a result, the accounting department did all setup of programs, and processed all registrations. Even program rosters had to be printed by accounting, for the program departments. Program information had to be entered three times – once into our legacy system by accounting, once by our staff into a separate database for our quarterly program catalog, and a third time for our website. And we did not have a real on-line program registration system – just an email system that required all on-line registrations to be entered manually.”

The JCC sells personal training and aquatics packages to members and non-members. Paper coupons are sold to members, and have to be “punched” or redeemed by JCC trainers and swim instructors. There is significant potential for fraud, keeping accurate records of training and lessons delivered to calculate trainer/instructor commissions is very difficult, and the JCC has no way of knowing what its deferred revenue liability for un-used training sessions and swim lessons is. Worst of all, members complain about having to hold on to a physical, paper card that must be carried to the pool or fitness center, and that can and does get lost or damaged easily.

The Solution:

Balance forward billing

CSI Software is a balance-forward system, where payments are applied against a member's total balance owed, not to specific charges – similar to credit card billing. Product Codes can have up to 15 characters, plus a 40 character description, and do not need to be associated with specific years. The CSI Software billing process drafts credit cards and bank accounts automatically. CSI Software is also a 'zero-balance' system, and does not show future charges on statements.

“We’ve only been using CSI Software for 3 months, and we’ve been able to reduce the number of statements we send out by two-thirds” says Barbara Merson. “Taking and applying payments, processing credit cards and EFTs, and checking and sending out statements gets faster and more accurate each month. Its freed up significant time in our accounting department, to ‘clean up’ tens of thousands of dollars of misapplied payments and incorrect balances – and to improve customer service.” “I’ve worked with balance-forward, zero-balance systems at other organizations. Credit-card style billing requires a different mindset, and can take time for some customers and staff to get used to. We do get some members that want to know, ‘how much do I owe, just for my membership’...and some of our departments want to know, ‘which members owe money for our programs’...and we are able to answer these questions in CSI Software, with reports and some homework. But with proper training of staff, and education of members, most are making the transition quite smoothly. And overall the JCC is better off as an organization when our members and staff focus on paying and collecting what is owed to the JCC as a whole – and when every future charge has an identified source of payment, ie credit card or bank account.”

Improved Efficiency – CSI Software Program Registration

The CSI Software program registration module enabled the JCC to ‘decentralize’ and streamline program setup, registration, and reporting.

Barbara Merson explains “We trained all of our program departments, to setup their programs in CSI Software, and to run their own roster reports and attendance sheets. Registrations are now handled almost entirely by our Front Desk staff. And we use the program setup data in CSI Software, entered once by our program department staff, to generate our quarterly program guide. We plan to implement CSI Software On-line for on-line program registration this summer.”

Improved Customer Service – CSI Software Series Sales

Barbara Merson comments: “We just recently implemented CSI Software Series Sales for new sales of personal training and aquatics packages. And next month, we plan to require all outstanding paper coupons, to be exchanged for the appropriate CSI Software Series. Our members have responded very positively. So far, a system of asking members to ‘render’ their sessions at our front desk, and take the CSI Software receipt to the trainer or instructor, is working well. Our managers are eager to use CSI Software reports to automate the calculation of commissions. And we finally are getting a handle on the JCC’s future obligation, to deliver series services.”

Improved Financial Controls – CSI Software Payment Plans (“Repetitives”)

According to Barbara Merson: “One of the biggest improvements we’ve been able to ‘piggyback’ onto our CSI Software implementation, is tightening and standardizing our payment plan policies for Camp and Early Childhood services. Until recently, we would register a child into Camp or Early Childhood,

with a small deposit, and the timing and amount for future payments, plus how those payments were made, was determined later. During our CSI Software implementation, we re-visited these policies as we were trained in the many powerful CSI Software features for managing payment plans. We recently implemented policies that require commitment to the timing and amounts of future payments when registration is made. We also started requiring a credit card or bank account number be provided for all payment plans. Although most registrations with payment plans are still being done by the accounting department, we are starting to 'decentralize' responsibility for this to the program departments, with accounting playing more of a system audit role.”

Barbara Merson comments further: “The Point of Sale features in CSI Software have also improved our financial controls. In the past, cash was taken in by program departments outside any system, with no real accountability or audit trail. Now every transaction is done in CSI Software, and all staff selling any JCC service or product must use CSI Software Point of Sale and run the End of Shift reports.”

The Benefits:

- Software adoption across all departments
- Improved customer service
- Improved employee productivity
- Better financial controls

About CSI Software

CSI Software is the leading provider of membership management software and services designed for health and fitness clubs, campus recreation centers, wellness centers, JCC/YMCA/YWCA organizations, and parks and recreation departments.

For more information logon to csisoftwareusa.com