

Welcome To The Card Office: A Guide for New Card Program Professionals

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About the Presenter

- Working in the campus card field since 2003
- Established the Purple Plus card program at Mount Union College in 2003 (Alliance, Ohio)
- Working in higher education since 2000 with experience in student activities, orientation and event planning
- MBA from Youngstown State University
- Assumed responsibility for Palm Beach State College Card Program in January 2007

Session Outline

- About Palm Beach State College
- Card industry terminology
- New Card Program
- Starting in a new office
- Resources
- Advice from other professionals
- Questions
- Wrap-Up



Palm Beach State College

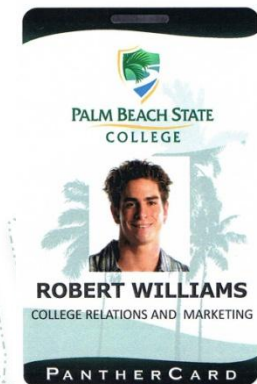
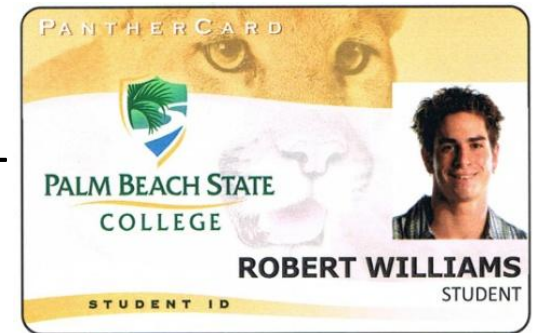
- Florida's First Community College
- Palm Beach County – Florida
- 4 Campuses
- 49,000+ Students (credit & non-credit)
- Name changed in January 2010 from Palm Beach Community College to Palm Beach State College



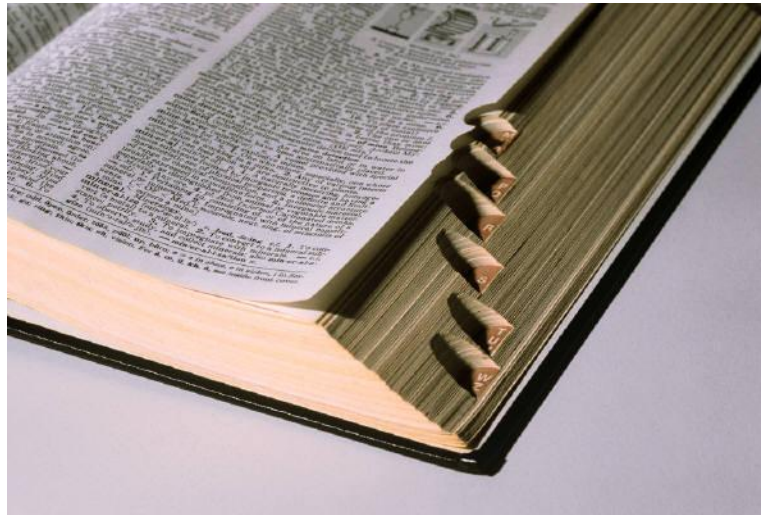
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The PantherCard

- All in one card program est. approx. Jan. 2004
- 136,000 + cards issued as of 12/1/2010
- Staff of 1 professional, 1or 2 student workers, IT support as needed
- Student/Staff Identification
- Library Card
- Declining Balance
- Printing/Copying
- Bookstore and Cafeteria
- Access to lab spaces
- Financial Aid
- BlackBoard Transaction System

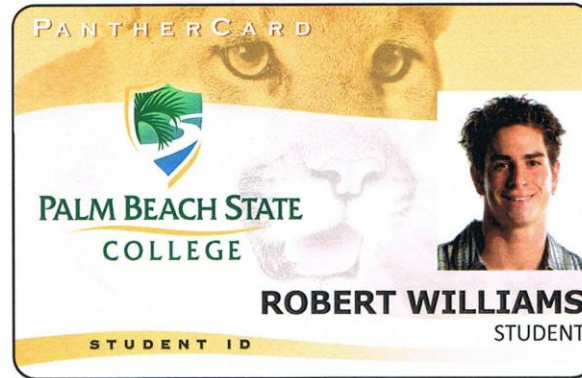


Card Program Terminology



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What is a Campus Card?



All-in-One Card or Campus Card

Use of a single photo id card for various purposes on campus. This card is usually provided to all students, faculty and staff on campus and can provide the following services:

- Identification
- Security / Door Access
- Meal Plan access/tracking
- Library privileges
- Stored Value (Declining Balance) purchasing power
- Banking relationship

Types of Cards

Magnetic Stripe Cards:

One of the most common campus card types. Includes a strip of magnetic material on the surface of the card that is encoded with cardholder information. (also referred to as Mag Stripe Cards)

Terms Associated with Magnetic Stripe Cards

Track 1, 2, 3 Encoding

Coercivity (Hi-Co vs. Lo-Co)

Mil

PVC

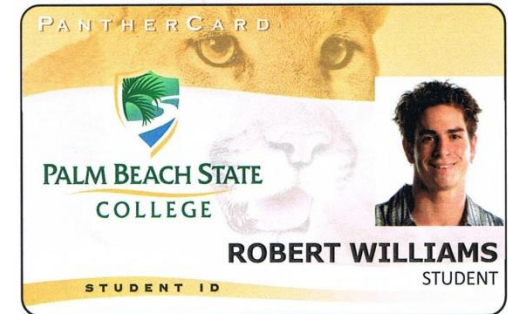
Composite Cards

CR80 Card

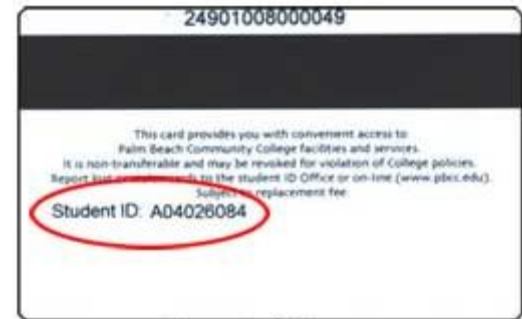
Pre-Printed Cards

Duplex Printing

Overlay/Lamination



Front View



Back View

Other Card Types

- Smart Cards
- Proximity (Prox) Cards
- I-Class Cards
- Chip Cards



Smart Card

Campus Card Lingo...

Unattended Reader: A reader that is not in constant communication with the host system.

POS: Point-of-sale

Declining Balance: Deduction of funds/points upon use of products or services.

Production Station: Location where cards are produced.

NACCU: National Association of Campus Card Users

SIS: Student Information System

PCI Compliance: A set of requirements designed to ensure that **ALL** companies that **process, store or transmit** credit card information maintain a secure environment.



Other Terms

Card Reader

Attended/Unattended Card Readers

Online vs. Offline Readers

Door Reader

POS

SV&C

Declining Balance

Meal Plan/Board Plan

Bar Code

Cash Equivalency

Credit Plan

Hologram

Kiosk

PIN

Points Plan

Proprietary

Affinity Card

Bleed

Encoder

PMS (Pantone Matching System)

Biometrics

Banking Relationship



New Card Program



Attend a NACCU Conference



NACCU Conference Registration = \$490

New Professionals Institute = \$50

Plane Ticket = \$300

Hotel = \$800

Meals = \$150

Networking at the Conference = PRICELESS

<http://www.naccu.org/2011/index.htm>



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Form a Focus/Advisory Group



- Appropriate VP(s) (Business Affairs, Student Affairs, etc)
- IT Director
- Facilities Director
- Director of Residence Life
- Student Representatives
- Chief Auxiliary Officer (if applicable)
- Director of Food Services
- Director of Security

Understand the Goals for the Program

What is expected from the card program?

What already exists on campus?



Campus Visits



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Create a Timeline



RFP

According to Wikipedia:

A **Request for Proposal** (referred to as **RFP**) is an invitation for suppliers, through a [bidding](#) process, to submit a [proposal](#) on a specific [commodity](#) or [service](#). A bidding process is one of the best methods for leveraging a company's negotiating ability and purchasing power with suppliers. The Request process brings structure to the procurement decision and allows the risks and benefits to be identified clearly upfront. The Request purchase process is lengthier than others, so it is used only where its many advantages outweigh any disadvantages and delays caused. The added benefit of input from a broad spectrum of functional experts ensures that the solution chosen will suit the company's requirements.

http://en.wikipedia.org/wiki/Request_for_Proposal



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Campus Meetings



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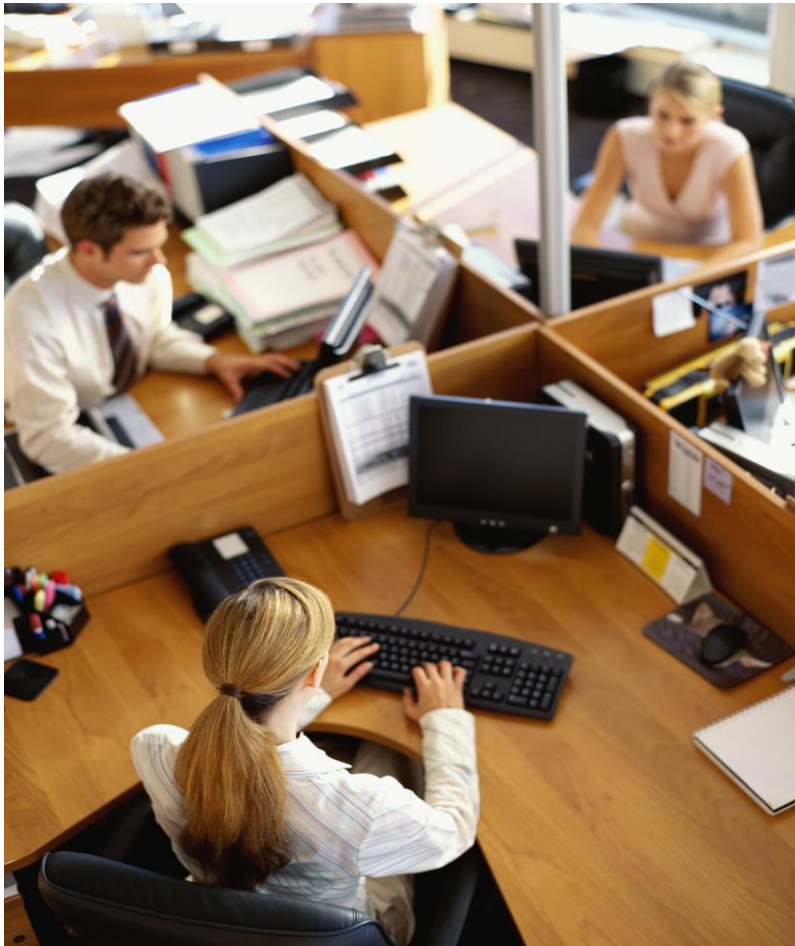
The Decision!



- Cost
- Campus Goals
- Timeline
- Ongoing Costs
- IT Support
- Information Transfer
- References
- Staffing



Setting up an Office



- Size Matters!
- 2 Doors
- Private Areas
- Inner Office and Outer Office
- Good Signage
- Location – Location – Location



Training



- Who needs to be trained?
- Training options
- Timing of training
- Documentation



Marketing

- Elicit help from the “experts” on your campus
- Create a plan and budget
- Plan for implementation
- Get the word out!
- Keep your web site current



Additional Preparation

- Policies and Procedures
- Forms needed
- Marketing materials and give-aways
- Office Signage
- Carding Supplies
- Updates

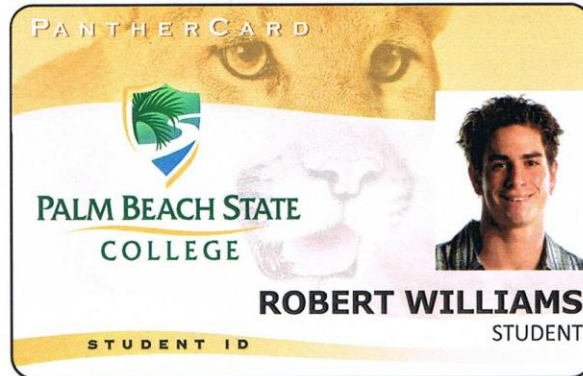


3, 2, 1 LIFTOFF!



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Card Distribution/Production



New Students

- Are there existing events that carding can partner with?
- Do you want to take pictures on campus or accept electronic submission?
- What about distance learning students?
- Do you have a policy regarding hats/head coverings/sunglasses?
- What volume can you handle at your office location(s)?
- Do you need to consider remote carding locations for peak periods?
- When will students receive their campus card?
- Do students and admissions/orientation staff understand the card issuance procedures on your campus?

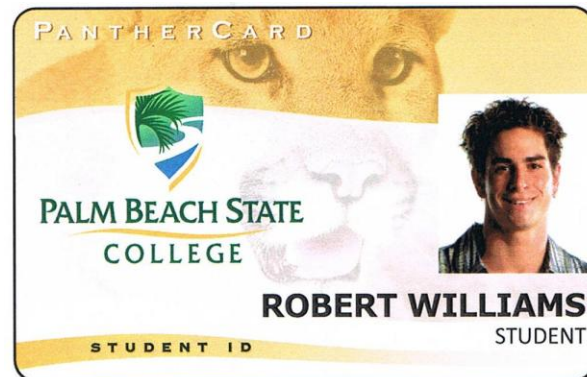
Card Distribution/Production

Returning Students

- Do students already have a card that you need to replace?
- What is the incentive for coming in to get a new card?
- What existing events take place for returning students that you can co-exist with?
- Can they keep a previous picture or will you require a new one?
- Do you have a deadline for obtaining a new card?

Faculty/Staff

- Don't forget about them – how can you make it convenient?
- Deadline for obtaining a new card?



Write it down...



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The New Job!



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Do Your Homework!



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Meet your staff



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Get to know the campus



Key People to Meet

- IT Director
- IT Staff
- Student Services Director
- Residence Life Staff
- Facilities Management (person responsible for door access)
- Dining Manager
- Bookstore Manager
- Athletic Director
- Student Government
- Electrician
- Business Office Staff
- Director of Security and Security Staff



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Form a Focus/Advisory Group



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- Facilities Director
- Director of Residence Life
- Student Representatives
- Chief Auxiliary Officer (if applicable)
- Director of Food Services
- Director of Security



Beyond the Meeting...

- Join Committees
- Make friends
- Keep in touch
- Keep up with campus news



Create Your Network



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Networking

- Join NACCU
- Attend a NACCU conference
- Participate in NACCU List serve
- Meet with your system provider staff (live or via teleconference)
- Attend or host system training
- Set up meetings with colleagues in your area
- Join your system provider user group
- Read current publications



Meet your System Provider

- Key People
- Placing a service call
- Contract period (when is it up for renewal?)
- What items are covered under maintenance and at what level?
- Key Terminology
- History of system (recent install, ready for upgrade, etc.)
- Availability of List Serve
- User Group
- Upcoming Training
- References or key people in the field



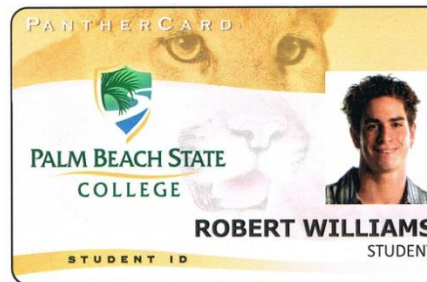
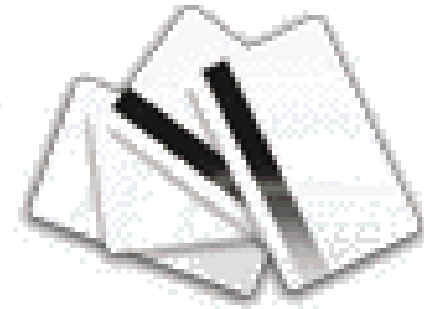
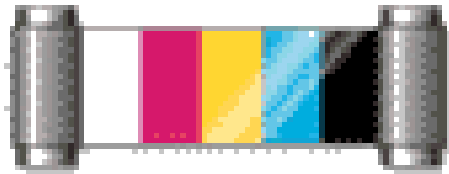
Get to know your equipment



- Tour campus
- Take inventory
- Locate and review manuals
- Review general operation
- Talk with front-line staff
- Talk to students
- Learn troubleshooting procedures



Ordering Supplies



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Use your resources

- NACCU and publications
- NACCU List Serve
- System Provider List Serve
- NACCU Colleagues
- *Regarding ID Magazine (Re:ID)*
- *ContactlessNews*
- *CR80News*



Some Advice

Understand the terminology at your school!

Make Lots of Friends!

Use your system for a little while and then compile your questions.

Don't be afraid to ask questions!

You don't have to reinvent the wheel – utilize the knowledge from colleagues and other resources.

There is no such thing as a stupid question.



More Advice

- Pair an IT representative with a business unit representative
- Reward effective teamwork!
- Invest in training
- Invest in system upgrades
- Involve IT in training efforts
- Upgrade and maintain your campus card system infrastructure, downtime is not acceptable
- Balance regularly and maintain audit controls for every application
- Start the day by reviewing the campus newspapers
- It is a customer service driven area
- Utilize your student government association



Questions?



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