



# How Community Brands cut document verification from 2 weeks to <2 days and saved 30% YOY

Session moderated by: Dan Dubiner, CTO ScaleHub  
Kendra Foss, Community Brands



# Agenda

- 1 Introduction to Community Brands
- 2 Our Pain Points
- 3 Our Solution for SSS
- 4 The Major Results
- 5 SSS Financial Aid vs. TADS Financial Aid
- 6 What's Next for Community Brands?



# Intro to Community Brands



# Kendra Foss

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- Product Manager for Financial Aid products
- 12 years of experience in Education Software
- Joined CB in August of 2018
- Focused on market expansion and continued revenue growth
- Enjoys all of the seasons (even the long winters) in Saint Paul, Minnesota with her husband and 2 fantastic kids



A woman with curly hair is looking down at a tablet. The image is overlaid with a teal gradient. The text is on the left side of the image.

Helping passionate  
people and  
purpose-driven  
organizations  
achieve more for  
their communities

communitybrands®



## Solutions for Schools

Enrollment and student management, billing, family engagement, tuition, and payments



## Solutions for Nonprofits

Donor management, fundraising, mobile auctions, fund accounting, and events



## Solutions for Associations

Membership, learning management, career centers, fundraising, and event management



## Solutions for Churches

Church operations, tithing and financial management, communications



# Solutions for Schools

9

BRANDS

4,000

SCHOOLS SERVED IN  
THE UNITED STATES

1M+

STUDENTS ENROLLED

160+

YEARS EXPERIENCE  
AMONG OUR BRANDS

TADS™

 SeniorSystems®

 educate™

ravenna®

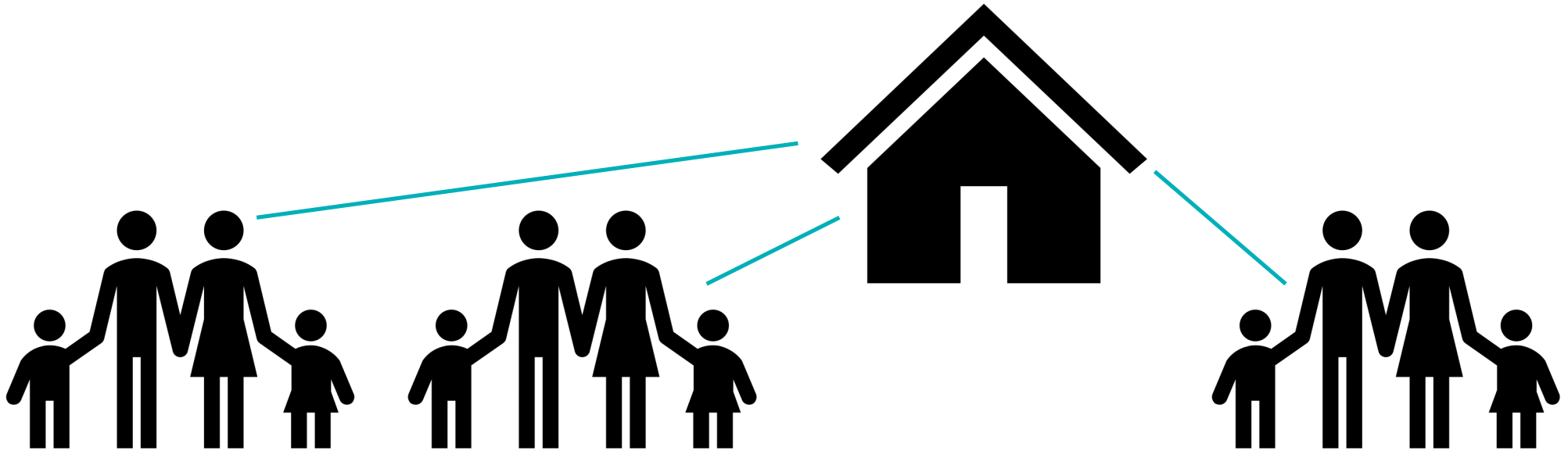
 SCHOOL & STUDENT  
SERVICES

 DIAMOND  
MIND

 my  
school  
wallet

SchoolSpeak™

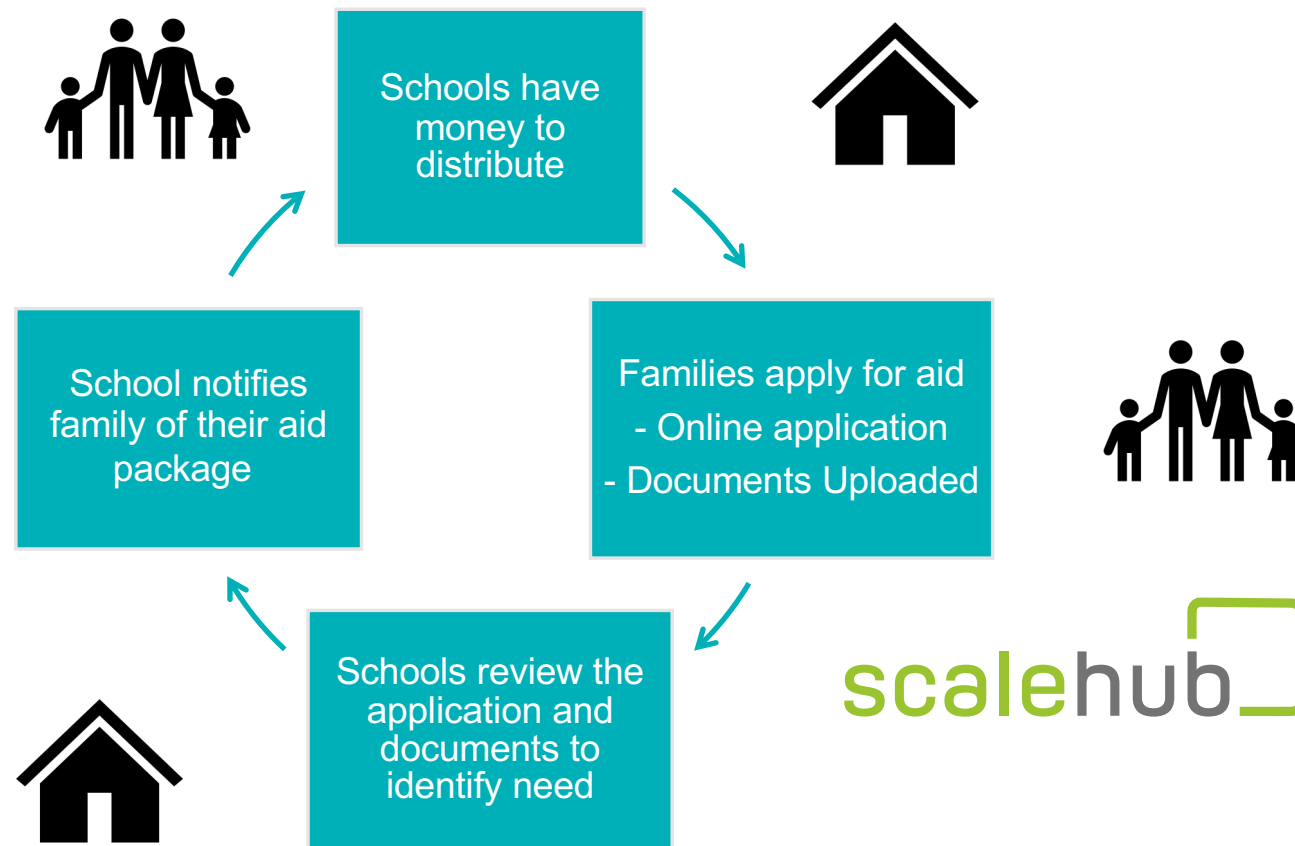
 inRESONANCE®



Individual Schools with **aid \$\$**  
available to families they know

## Current Strength in Private K-12 Financial Aid

# K12 Financial Aid Business Cycle



# Primary Objectives of our FA Solutions

1. Understand the family financials
2. Verify the application with documentation
3. Tell schools how much money the family needs



# Community Brand's Pain Points

A comparison in managing the same business through two systems

## SSS Pain Points

- **10-12 business days** for a document type and its year to be verified
- Accuracy dipped below **70%**
- Tax documents opened in full – **exposing sensitive PII**

## TADS FA Pain Points

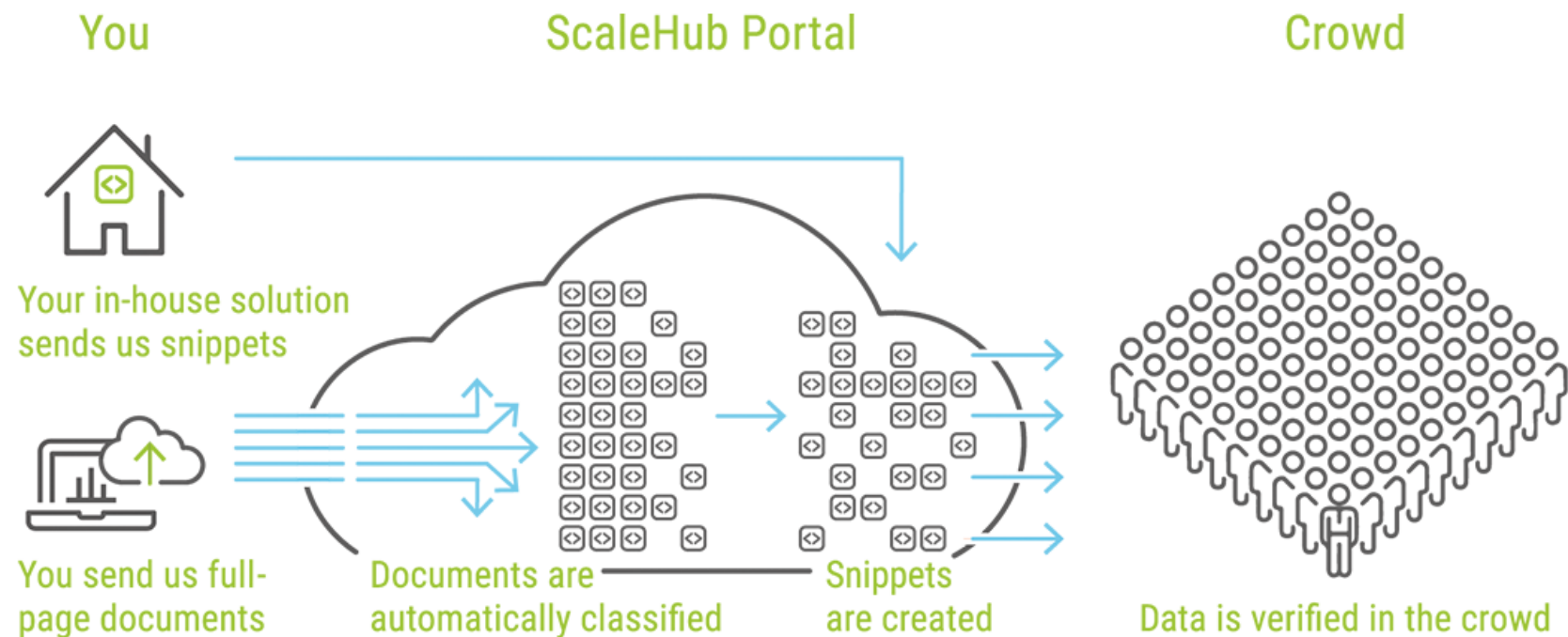
- **3 business days** for a document type and its year to be verified
- Up to **6 weeks** for full application verification
- Tax documents opened in full – **exposing sensitive PII**





# Our Solution for SSS

# ScaleHub Services



scalehub

**Form 1040** Department of the Treasury—Internal Revenue Service **2016** (OMB No. 1545-0047) (Use Only—Do not write or staple in this space.)

For the year Jan. 1–Dec. 31, 2016, or other tax year beginning 2016, ending 20

Your first name and initial **BOB E** Last name **WILLIAMS** Your social security number **123145678**

If a joint return, spouse's first name and initial **SUE L** Last name **WILLIAMS** Spouse's social security number **987165432**

Home address (number and street). If you have a P.O. box, see instructions. Apt. no. **12 MY STREET**

City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions). **ATOWN, USA 12345-6789**

Foreign country name Foreign province/state/country Foreign postal code

**Filing Status**

1 ☐ Single

2 ☒ Married filing jointly (even if only one had income)

3 ☐ Married filing separately. Enter spouse's SSN above and full name here. ▶

4 ☐ Head of household (with qualifying person). (See instructions.) If the qualifying person is a child but not your dependent, enter this child's name here. ▶

5 ☐ Qualifying widow(er) with dependent child

**Exemptions**

6a ☒ Yourself. If someone can claim you as a dependent, do not check box 6a.

b ☒ Spouse

c Dependents:

(i) First name	Last name	(ii) Dependent's social security number	(iii) Dependent's relationship to you	(iv) <input checked="" type="checkbox"/> If child under age 17 qualifying for child tax credit (see instructions)
WILLIAM	WILLIAMS	111 22 333	SON	<input checked="" type="checkbox"/>
EMMA	WILLIAMS	123 44 123	DAUGHTER	<input checked="" type="checkbox"/>

If more than four dependents, see instructions and check here ▶ ☐

d Total number of exemptions claimed

**Income**

7 Wages, salaries, tips, etc. Attach Form(s) W-2 **117,735**

8a Taxable interest. Attach Schedule B if required

8b Tax-exempt interest. Do not include on line 8a

9a Ordinary dividends. Attach Schedule B if required **204**

9b Qualified dividends

10 Taxable refunds, credits, or offsets of state and local income taxes

11 Alimony received

12 Business income or (loss). Attach Schedule C or C-EZ

13 Capital gain or (loss). Attach Schedule D if required. If not required, check here ▶ ☐

14 Other gains or (losses). Attach Form 4797

15a IRA distributions **15a** b Taxable amount

15b Pensions and annuities **15b** b Taxable amount

17 Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E

18 Farm income or (loss). Attach Schedule F

19 Unemployment compensation

20a Social security benefits **20a** b Taxable amount

21 Other income. List type and amount

22 Combine the amounts in the far right column for lines 7 through 21. This is your total income ▶

**Adjusted Gross Income**

23 Educator expenses

24 Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ

25 Health savings account deduction. Attach Form 8889

26 Moving expenses. Attach Form 3903

27 Deductible part of self-employment tax. Attach Schedule SE

28 Self-employed SEP, SIMPLE, and qualified plans

29 Self-employed health insurance deduction

30 Penalty on early withdrawal of savings

31a Alimony paid b Recipient's SSN ▶

32 IRA deduction

33 Student loan interest deduction

34 Tuition and fees. Attach Form 8917

35 Domestic production activities deduction. Attach Form 8903

36 Add lines 23 through 35

37 Subtract line 36 from line 22. This is your adjusted gross income **117,333**

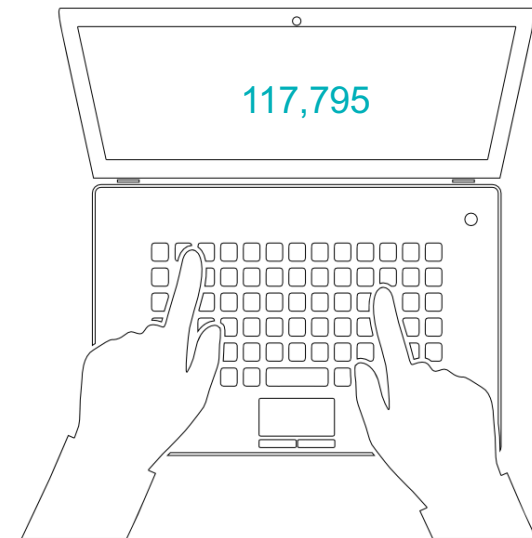
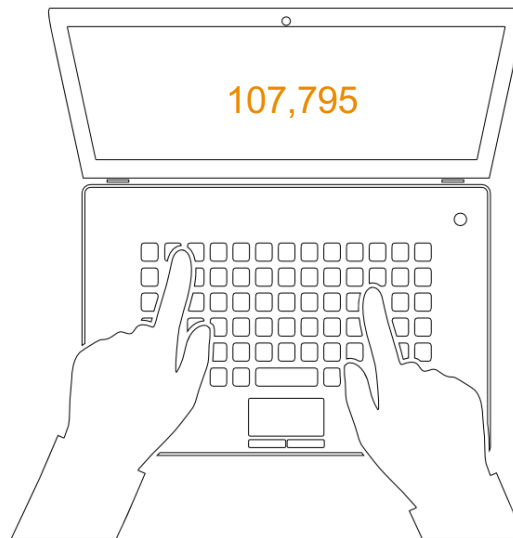
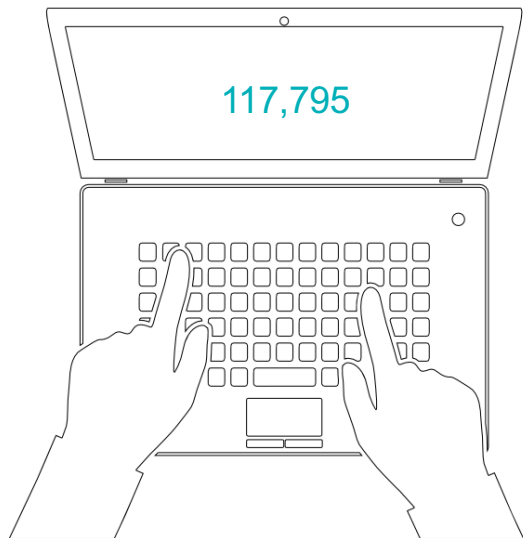
For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions. Cat. No. 113208 Form 1040 (2016)

117,735

204

scalehub

# Double or triple keying of each snippet guarantees 99% accuracy

A rectangular label with a double orange border. Inside the label, the number "117,795" is handwritten in black ink. The label is positioned horizontally.



# The Major Results

The ScaleHub services  
have fundamentally  
changed SSS.

No one in our market can  
come close to our speed  
and accuracy for document  
verification – not even  
TADS FA.

# The Benefits

- 30% YoY savings in operating costs
- Support volume decreased
- Schools able to identify aid \$\$ for their families with confidence in a matter of days



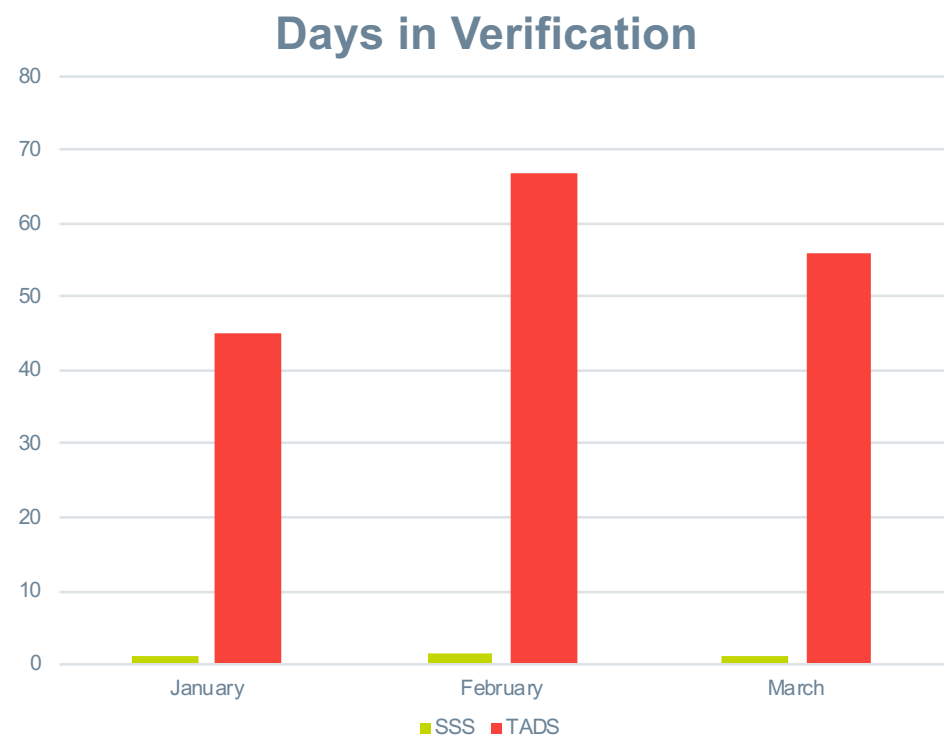
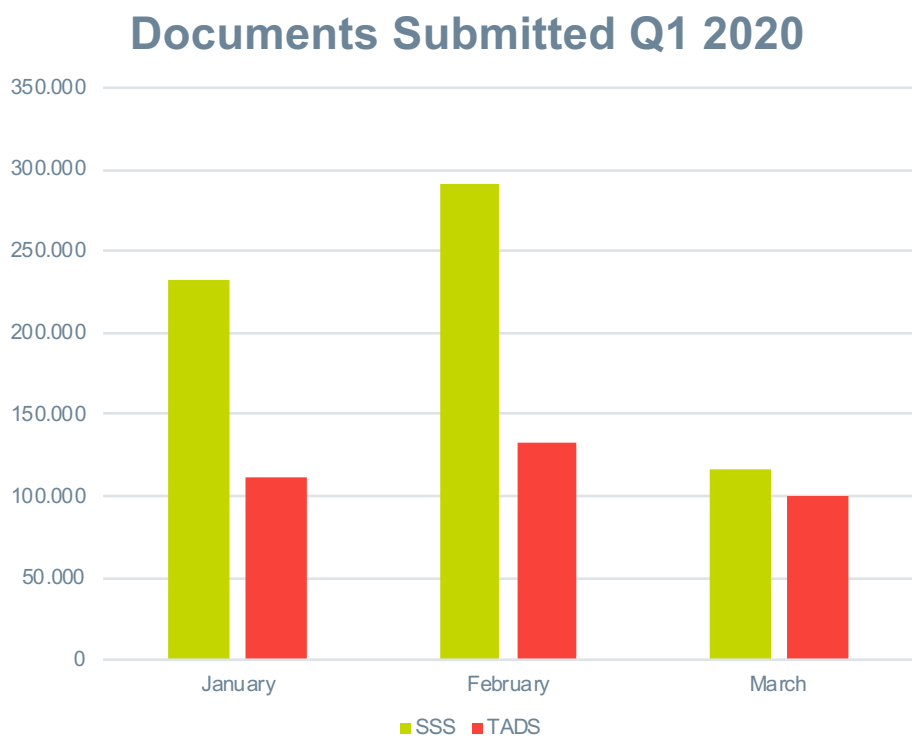


# SSS Financial Aid vs. TADS Financial Aid

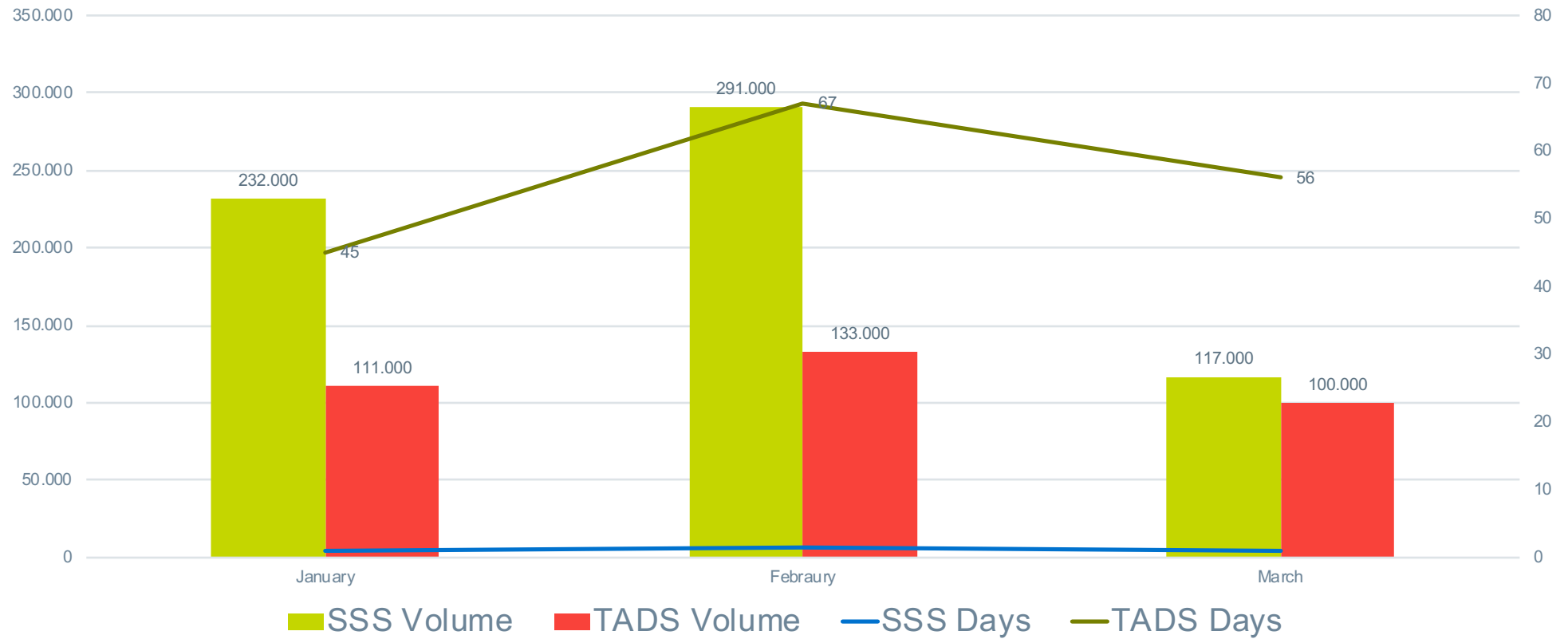
A comparison in document processing



# Volume and Speed Comparison



## Volume and Speed Comparison



## SSS Pain Points

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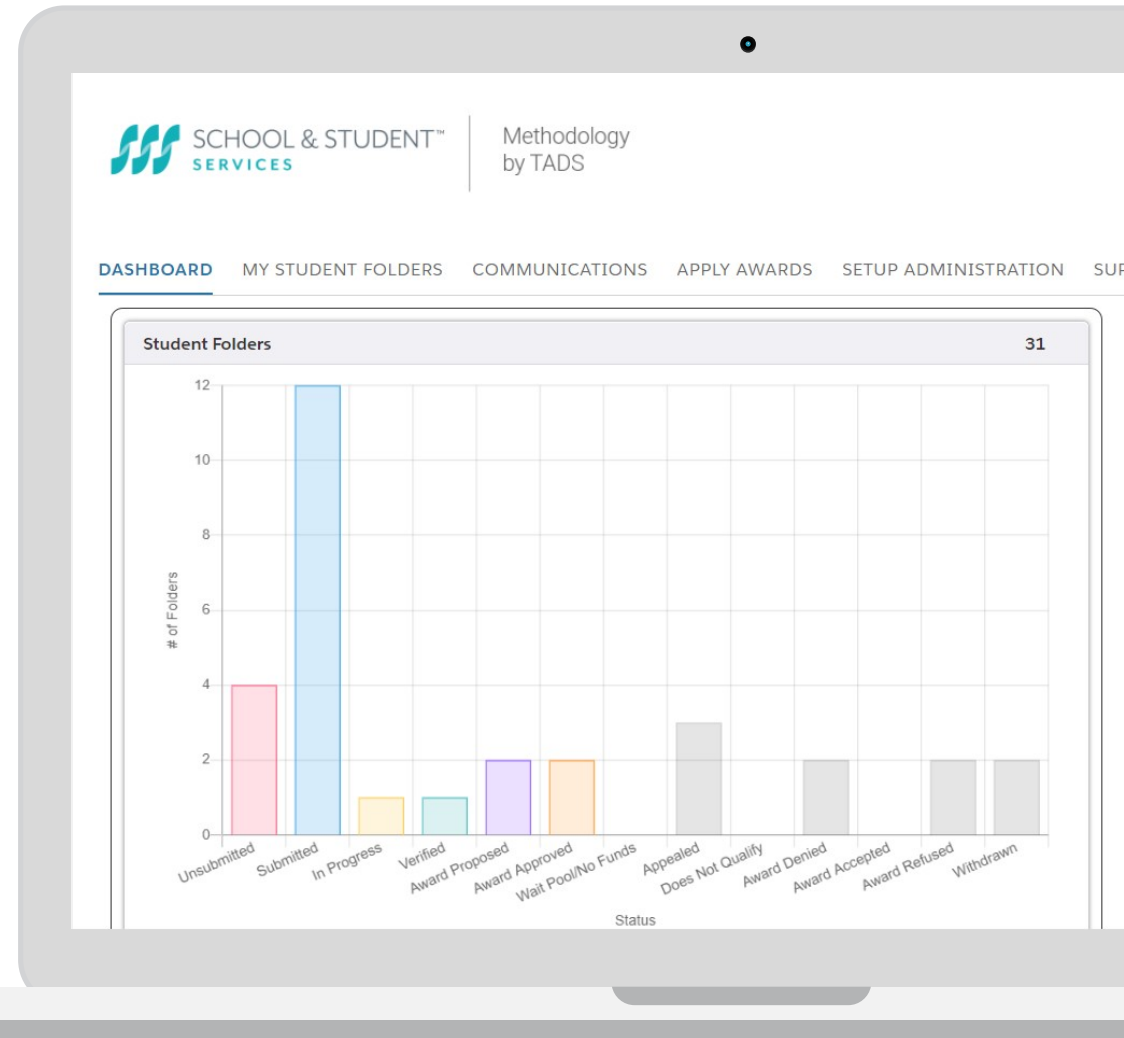
- **Less than 2 business days** to verify all documents
- Accuracy at **99%**
- **PII data secure** and never fully exposed



# What's Next for Community Brands?

# TADS FA moving to the SSS Platform

- 90 Pilot Schools onboarded this fall
- One platform for supporting both businesses expected to save CB thousands in COGS
- Verification services from ScaleHub was the catalyst for this investment





Thank you.