

Administrative Program Review Report for Western Carolina University

Unit Reviewed:

OneStop Student Service Center

Western Carolina University

Reviewed by:

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Reviewed on: June 3-4, 2013

Introduction

On June 3 and 4, 2013, an administrative program review of the OneStop Student Service Center at Western Carolina University was performed by two internal reviewers (A.J. Grube and Dan Berk) and one external reviewer (Julie Selander, University of Minnesota). The purpose of this review was to assess the unit's mission, operations, and resources relative to core effectiveness criteria outlined by the Office of Institutional Planning and Effectiveness.

Following a thorough study of the report submitted by the Associate Director of the OneStop, the review team met with the following people:

Mark Lord, Interim Associate Provost

Larry Hammer, Registrar

Mike Razdrh, Associate Director, OneStop

Trina Orr, Director, Financial Aid

Nancy Brendell, Bursar

Jeff Bewsey, Director, Auxiliary Services

Pam Buchanan, Director, Health Services

Pam Degraffenreid, University Bookstore

Two WCU students

OneStop Staff Members:

Laura Ernst

Linda Carmody

OneStop student workers:

Isaac Melcher

Perry Fotopoulos

Cody Dunlap

In addition to the individual and group interviews conducted, the review team received a tour of the OneStop and its affiliated offices' operations (i.e., financial aid, registrar). The interviews and discussions gave the review team a greater understanding of the OneStop organization in order to complete a constructive assessment.

The OneStop Student Service Center provides a central location to promote academic success, increase retention, decrease time toward graduation, and improve the overall educational experience of its students. The primary unit function is to provide customer service to students, their families, the campus community, and the general public through telephone and walk-in contact.

The key functions within the organization include customer service for Registrar, Financial Aid, Student Accounts, and Cat Card functions, as well as general functions for virtually any student-related area including, but not limited to Admissions, Advising, Parking Services, Residential Living, events, directions, transportation, and general services. The range of services offered by OneStop and the methods by which they are provided for WCU's student body is appropriate and relate directly to the mission and goals of OneStop. WCU's OneStop model is consistent with the types of services offered at other "onestop" or integrated student service models offered at other institutions of higher education.

This report summarizes the team's general perceptions including the strengths and successes of the unit, challenges within the unit including opportunities for improvement, and recommendations for consideration.

Strengths of the Organization

The following items were identified as strengths or successes of the OneStop Student Service Center.

Customer service attitude

All of the staff interviewed applauded this facet of the OneStop. Not only did OneStop staff and students rate themselves as highly customer service oriented, but consumers and constituent groups did as well. Common threads in all staff and student discussions included:

- A recognition of students and parents seeking help as "customers".
- A genuine desire to be able to help even more than today.
- Remorse for whenever inaccurate information might have been conveyed.
- Examples of exceeding OneStop stated objectives by helping their customers in ways outside traditional OneStop scope of work.
- All interviewees conducted themselves in a very positive, open, and professional manner.

- The willingness of OneStop staff to incorporate several steps to help reduce lines and service their customers better during peak times. These include setting up additional kiosk stations for self-service, and canvassing long lines during peak times to address quick issues like people needing only to drop off forms.

This 360° view lends considerable credence to the conclusion that this most critical success factor for any service agency is well established within the OneStop. Their biggest strength might be considered their staff.

Service delivery

As in all organizations, there are clear areas of strength, as well as room for improvement. Positive comments about the OneStop's ability to deliver service in line with its' stated objectives were clearly evident. Three elements of service delivery most related to the OneStop include:

Speed - One aspect is first time contact resolution. Quantitatively, the OneStop resolves 87-89% of questions without referral. Students progress through the OneStop in rapid succession and staff are able to help each person in less than 1 minute.

Accuracy and quality – although quantitative metrics are not available, the prevailing sentiment of all interviewed is that accuracy/quality of service is a strength for the OneStop. Several offered that errors certainly happen due to human error, last minute regulation changes, etc., but no evidence was presented pointing to a systemic problem. Additionally it was noted by many that the OneStop Associate Director has recurring meetings with all constituents to glean needed details about regulatory and policy issues, to stay current with recent changes.

Relationships

- Internally – very team focused
- Externally with constituent groups
 - Excellent working relationships exist between OneStop Associate Director and all constituent groups
 - Recurring outreach by OneStop Associate Director to each constituent group (monthly, beginning of semester) to talk about OneStop, changes in regulations

Concept of a OneStop

OneStop provides a centralized, streamlined approach to students and results in less runaround for students. The stated objectives focus around two areas –

- 1) Promoting academic success, decreasing time toward graduation, etc.
- 2) Combine multiple student services into a central location.

After interviews today, it is clear that the vast majority of added value from the OneStop organization come from (2) above. Although they may indirectly improve elements

regarding (1), there is no indication of any direct correlation. From discussions with constituent groups it is clear that they unanimously agree the OneStop most definitely achieves, if not surpasses, their needs. All agree they provide accurate, timely support in a very customer service friendly manner.

Facilities

All people interviewed had the same, positive comments about the physical facilities of the OneStop. Namely that its' location and layout directly align to its' stated mission.

- It is centrally located, and is constructed in a way conducive to customer service. It provides easy access to its' customer base.
- Several other constituent groups (i.e., financial aid, CatCard) offices are co-located in the building as well.
- Although peak usage times can generate long lines out the door, space available is adequate for "normal" business volumes.

Metrics

Although the collection of metrics and their use as a tool to improve service value is in its infancy, it is good to see that a realization of their value is apparent.

Challenges and Opportunities for Enhancement

The following items were identified as challenges and opportunities for enhancement for the OneStop.

Inadequate level of institutional support

There does not seem to be adequate or significant institutional support for OneStop staff. The following areas of concern were drawn from discussions around lack of both resource and financial bandwidth:

- Professional development, staff training, and empowerment: While appreciation was expressed for the Friday morning training time, there was an expressed need for professional development at all levels. With such a small budget (\$3,000), it is nearly impossible for the staff to be exposed to seminars or conferences that would permit them to improve their skills (e.g. customer services). Students could also benefit from training opportunities. For example, there needs to be a knowledge based system for students to help themselves and for staff to help students. The amount of training for all staff could be increased. In addition, there were indicators that additional training on financial aid topics would be beneficial. As this field is constantly changing, it is imperative that staff receive frequent updates. Increased access for both OneStop staff and OneStop student workers, as well as empowering staff to make more independent decisions and apply professional judgment would allow them to provide a

- greater level of customer service and would allow staff to actually fix things in the system after they have identified the source of the problem.
- Sufficient time for management and administration activities. As Mike Razdrh is a “working” manager, he often is helping work the OneStop front desk. If a staff member is absent, Mike must staff this position. This may not provide sufficient opportunity for him to focus on administrative tasks such as metrics, process improvements, technology, etc.
 - Automation and systems improvements. No projects have been registered with IT to provide additional tools or services for the OneStop. There is, however, a simple data capture application written by IT and loaded on each OneStop workstation providing minimal tracking (number of students served, the type of need expressed, etc.). This is a stand-alone PC-based application, not web-based.

Need for improved virtual presence for students

The campus community would benefit from an improved virtual OneStop presence. The current web-based presence is somewhat old and not perceived to be entirely effective. A revised, improved web presence would serve as a potential knowledge management system.

Students bypassing OneStop for service elsewhere

Students often bypass the OneStop and walk directly into the offices of other units in the building (e.g. Financial Aid, Registrar). By accepting students directly, these units perpetuate and enable the issue. If students are to learn to stop at the OneStop, they must be forced to do so before going to another unit.

Lack of informal staff performance/assessment

While OneStop management performs formal performance reviews on an annual basis, the perception from one staff member is that they had not had a review of their performance in several years. It may be the case that an informal review through coaching and counseling may be needed. Through a more informal process that is scheduled periodically throughout year, the OneStop staff may better understand what they are doing well and where they can improve. Another way to facilitate improved performance is the use of qualitative metrics to measure satisfaction and impact (in addition to current volumetric data). This data could provide useful guidance when determining areas for targeted improvement. Organizational realignment and budget cuts have forced changes in resources and staffing. Resource leveling would help provide additional bandwidth (using existing resources) to tackle some challenges. Some cross-training of employees in other units (e.g. Registrar’s Office) has begun and should be continued to assist the OneStop staff during peak periods and to relieve them in the event of sickness or vacations. While the issue of an additional staff member for OneStop emerged, it was not consistently expressed. It should be noted, however, that if the need arises to expand the OneStop team, the effort would be severely restricted due to limited phone connectivity within the Killian Annex

building. Several constituents mentioned that additional copper twisted pair phone connections are not available. So, although staff could be added, additional phone lines could not be added without investing in a VoIP phone solution

Inadequate and confusing phone system

The current phone tree system is a great source of dissatisfaction. Many references were made to the number of times callers are re-routed and the amount of time it takes to reach a person.

Communicating OneStop's value to the campus community

OneStop would greatly benefit from reaching out to campus as a whole, not just constituent groups, showcasing the value it provides, metrics, asking for input, etc. There is significant appreciation for the services provided by OneStop. However, it would benefit the campus and OneStop if this conversation took place regularly. Specifically, communication should be improved around what OneStop does for other offices on campus.

Release code inconsistency

There seems to be inconsistency in how students' release codes are checked via telephone and at the OneStop desk. Education and training around this issue is key.

Summary of Recommendations

Within each of the challenges listed above lies opportunities for improvement. Some recommendations are inherent in the listed opportunity above, but additional recommendations that are of particular importance are listed below.

Assessment and Metrics: Assessing efficiency and effectiveness is an important component for any organization. In addition, it is important to understand the level of satisfaction by the organization's customers. While there may be data available that was not including in the self-study report, it appears that there is a minimal amount of metrics available (i.e., volume of phone and walk-in customers). Ideally, the organization would have available many other forms of metrics such as average wait time for phone and walk-in customers, average length of call or walk-in interaction, percentage of dropped calls, numbers of students assisted via email, volume of students/parents sorted by type of question (i.e., drop off a form, financial aid question, registration question). Therefore, it is recommended that the OneStop management determine what type of metrics it might be able to access and leverage for improvement of the organization.

Additionally, it is important to regularly survey customers to understand the level of satisfaction in the service being provided and to better understand customer expectations. It is recommended that the OneStop organization determine the best means and timing to

gather this information, such as an email survey, focus group, and/or point-of-service comment cards. It is suggested that the information gathered include some qualitative inquiry methodology to gather feedback and ideas from the student customers on the services being provided and how the needs of students are being met.

Knowledge Attainment/Retention, Training, and Access: Based on the interviews, it seems apparent that an opportunity lies in how staff are trained, kept informed of procedure/policy changes, and what access is granted to assist with problem resolution. Interviewees indicated a lack of formal training and being a bit “out of the loop” with on-going changes (such as financial aid regulatory changes). OneStop staff felt that they could do a better job answering students’ questions and solving problems if they had more access to view and/or update information in the Banner system. An example is having access to residential life information to answer questions on what dorms and meal plans students had signed up for, as well as access to change meal plans per students’ requests.

Therefore, several recommendations for this include: 1) create an online knowledge base of information (relatively inexpensive, but takes some time to insert all of the frequently asked questions and answers) for students to answer their own questions (thereby reducing the number of contacts to OneStop and creating more efficiencies), which can also be used by staff an intranet for finding procedures/policies easily as they interact with students to ensure appropriate procedures/policies are followed; 2) create a formal training curriculum, onboarding process, and training assessments for any new staff employees to ensure they are trained accurately before they are allowed to work with student directly and to ensure they are prepared to give accurate information; and 3) open up access for student workers a bit more so they can help with simple student record information requests such as account balance, certification/transcript requests, etc. so they don’t need to interrupt other OneStop staff while they are helping students and don’t need to be the “messenger” or “information relay” between students and other OneStop staff. Also, open up access for existing OneStop staff to information within Banner that they need to solve problems and fix information, such as residential living and financial aid information.

Staff Performance Review and Professional Development: While OneStop management performs formal performance reviews on an annual basis, the perception from one staff member is that they had not had a review of their performance in several years. It is recommended that a more frequent informal performance analysis be done on a regular basis (i.e., monthly, semesterly) for the OneStop manager and the individual staff person meet to discuss individual performance development, issues, and concerns. This opportunity serves as a good way for the manager to coach and counsel staff on a regular basis and identify performance goals, issues, and a plan for improvement, and to build strong work relationships within the office. These sessions will also identify opportunities

for professional development and growth for the individual. It was identified that there were no professional development opportunities for OneStop. It is recommended that professional development opportunities be identified for OneStop management and staff and that a budget be created for this purpose.

Bifurcated Approach to Service: It was apparent through interviews and the tour that students determine if they go directly to OneStop or bypass that and go directly to the financial aid and/or registrar office. This sets up an environment where students may be getting different information from different sources and confusion is likely. In interviews it was identified that OneStop staff don't create detailed notes in the student's record and when there is no identification of who spoke to the student about what situation it can cause confusion, frustration, and no accountability. It is recommended to further analyze how all student questions (related to financial aid, student accounts, and registrar) can be funneled into OneStop. While there may still be a need for referrals to those other offices, there would be a more streamlined approach to how the student gets referred. There may be some hard decisions to make and communication to staff and students as to why this change is necessary.

Improvements in Technology: Improvements in the phone queue system and the virtual OneStop information (self-services via MyCat) should be considered sooner versus later. Many comments were made on the complicated and frustrating phone queue within OneStop, as well as the opportunity to move some additional information and processes online for students. It was surprising to the review team that no technology improvement projects had been requested or were "in queue" with the technology office on campus. The recommendation is to determine what immediate improvements can be made to the phone queue system in the very short term before the busy fall season and then analyze if there are long term improvements that can be made in the phone as well as the online self-services.

Review of Release Codes: While it is important to follow regulations related to student record privacy, there seems to be some misinterpretation (or very conservative approach to release of information) about the law relating to releasing information to students directly. The recommendation is to contact the institution's general counsel to determine how to remain compliant, but allow a seamless method of releasing information to students directly. Authentication of the student's identity on the phone should also be in alignment with authentication of student's identity for walk-in service.

Automation of forms, imaging, and workflow: There is a tremendous opportunity to increase efficiency and organizational effectiveness by automating the intake and processing of common student forms, as well as creating digital images of forms/documents, and implementing an automated workflow system within the OneStop,

financial aid, and student records offices. During the interview process, staff seemed very receptive to this idea. The recommendation is to analyze the tools available to provide this type of service and implement this type of efficiency process relatively soon.

Conclusion

The conclusion is that the OneStop Student Service Center is doing an incredible job in providing an exceptional level of customer service to the students and other constituents at Western Carolina University. The staff and management of OneStop have much to be proud of. Their willingness to assist customers in solving problems and answering questions is obvious. The OneStop staff want students to be successful in their academic endeavors at the institution. With some further analysis, consideration, and implementation of the recommendations above, the OneStop will continue on a path of continuous improvement of the organization.