# OE RESOURCE REQUEST APPLICATION

## I. SPONSORSHIP

A. Initiative

| Initiative | Student Services – One Stop Student Business Center | | |
|---|---|---|---|
| Initiative Manager | Anne De Luca | | |
| Phone | | E-Mail | oestudentservices@berkeley.edu |

B. Sponsorship

| Sponsor Name | Anne De Luca, Acting Associate Vice Chancellor | | |
|---|---|---|---|
| Sponsor Signature | | Date | |
| | | | |
| Sponsor Name | | | |
| Sponsor Signature | | Date | |
| | | | |
| OE Program Office Signature | | Date | |
| | | | |

C. Give the title of the resource

| One Stop Student Business Center |
|---|

## II. PROBLEM STATEMENT/CASE FOR CHANGE

A. Identify and describe what needs the proposed solution is seeking to address.

1. **Students and parents\* must contact multiple offices to conduct business**. In order to address administrative (i.e. non-academic) aspects of enrolling in classes, obtaining financial aid, paying their bills, and other business-like activities, students must communicate with the specific office that has expertise in that function. Students and parents view the campus as one entity. They are confused and frustrated when they can't be assisted at their first point of contact and need to be referred elsewhere.
\* We recognize that some students have grandparents, guardians, spouses, or other adults supporting their educational efforts. For ease of use, we will simply use the term "parents" throughout this proposal to refer to all third-party supporters.

2. **The central campus departments that serve students are located 15-minutes apart**. When students/parents must conduct their business in-person and are referred between offices in Sproul Hall and University Hall, they must walk 15-minutes to the other location. The time to travel between the offices, in addition to the varying service hours, often makes it difficult for students/parents to conduct business in a time efficient manner. This degrades student/parent satisfaction with service delivery.

3. **Currently, student service providers do not have complete knowledge or access to information to fully address the student inquiry.** Staff strives to assist students without bouncing them between offices. However, the staff does not have sufficient training in all areas or access to the multiple systems that are needed to piece together the financial picture. This may result in incomplete or inaccurate information to the student and

inefficient use of staff's time to resolve problems that may result.

4. **Students and parents have a negative view how the campus delivers student business-related services.** It is frequently mentioned that other schools deliver more sophisticated and student-centric service tools. Students/parents judge the overall educational experience by the quality of each and every interaction they have with campus personnel, web sites, business processes and systems. Currently, the service delivery is not meeting their expectations. Ultimately, this may reflect in decreased enrollment, degradation of the campus reputation, and resistance to future appeals for donations. This is especially relevant as students/parents assess the value they receive against the increasing cost to attend.

B. Describe the solution that is being proposed to meet the identified need(s).

The proposed solution is the creation of a physical office that can serve as a single point of service/referral for students/parents. The office will report to one entity but provide cross-functional information. This "one-stop" location will be staffed with service-oriented, cross-trained individuals who will strive to answer 80% of business-related inquiries/problems from students/parents. A "ticket" system will be used to generate a method for receiving, referring and tracking student inquires at the One Stop.

During initial implementation, business-related issues may include:
- Aid application process
- Aid eligibility: how much funding the student is eligible for; appeal process advising
- Aid disbursement: how do I get my money; what paperwork is needed
- Federal student loan counseling
- Work-study eligibility and earnings questions
- Electronic Funds Transfer authorizations for salary and non-salary payments to students
- Charges for registration fees, housing and miscellaneous educational expenses
- Understanding billing activity
- Payment methods accepted to pay bills
- Install drop box to accept checks to pay bills; do not accept cash
- Disbursement of refund and aid checks
- Registration status; blocks
- Class enrollment status; drop/add due dates; grades and grading options; transcripts
- Non-Residency classification; appeal process advising
- Sequencing of tasks in order to become enrolled and registered
- Summer Session information related to aid, billing and registration

Additional services that may be considered for future integration with the one-stop center may include:
- On-campus housing options; costs; assignments; coverage with aid
- Education Abroad Program
- Cal1Card debit program
- Parking permits and other commuting options
- Veteran/Military Affairs (e.g., inquiries about services, application of aid, etc.)
- Outside scholarship referral and eligibility
- Enrollment and degree verification
- Emergency loan issuance (analyze impact)
- UC scholarship questions (analyze impact)
- Campuswide system access and authentication
- Airbears support
- Directory information
- Graduate student fellowship funding
- Graduate student GSI/GSR appointment status

It is recognized, however, that the problems identified and the solutions proposed were assessed within the context of the current system environment. Students/parents struggle to obtain complete and timely information through web sites, which simply can't provide the information expected with existing campus technology. In

addition, the back-end systems are antiquated and cumbersome for service providers to learn and use, which contributes to increasing administrative cost. The lack of adequate and functional technology is what prompts many of the inquiries from the student/parent. This proposal will identify opportunities to improve service delivery within the existing system environment. However, to achieve full benefit of an efficient, knowledgeable, integrated service center, systems must be in place that are stronger, faster, and more streamlined. At a minimum, the campus should provide a content management system and robust student portal (i.e., electronic one-stop web site) to encourage students/parents to self-service. The knowledge base of these systems (i.e., content) will be provided by the offices that comprise the One Stop Business Center (i.e., Registrar, Billing & Payment Services, and the Financial Aid and Scholarship Office). Once that more robust computing environment is achieved, the need and scope of a physical one-stop service location should be re-evaluated and resourced accordingly.

Successful one stop models can be found at the following locations:

University of California Riverside http://www.insideucr.ucr.edu/cgi-bin/display.cgi?id=1066

McGill University    http://www.mcgill.ca/students/servicepoint/

 University of Minnesota  http://onestop.umn.edu/

 University of Cincinnati  http://onestop.uc.edu/

C. Describe the alternate approaches you evaluated in the process of developing this proposal and why those alternatives were not selected.

1.   **Maintain status quo, but seek to improve cross-training and cross-unit communication.**  Offices could remain distinctly separate, but seek to enhance the quality of information they provide.
 • Why not?  Does not address the inefficiency of providing in-person service from disparate locations.

2.   **Increase front-line and back-office staffing in existing student service offices.**  Student service offices have had to eliminate positions due to budget cuts.  With additional staffing, students will see improved response times to their inquiries and staff will have time to participate in cross-training activities.  In addition, turn-around time for back-office processing activities will improve.  Students often make multiple follow-up inquiries as to the status of a transaction that is in a back-office work queue
 • Why not?  Is not cost effective, especially in the long run.

3.   **The core offices of billing, aid and student records/registration could partner to provide a central site for service during peak periods of the semester (i.e., the first three weeks of the semester).** Some offices currently employ student workers for this activity; using students in an expanded service center will require further consideration.
 • Why not?  Students/parents will view this as a temporary solution; they will not benefit from a central service site during non-peak periods.
 • Why not?  Coordination logistics will be expensive; setting up and taking down the location (i.e., phones, equipment, etc.) or paying to maintain the infrastructure year-round will be costly.
 • Why not?  Training staff (who may not remain consistent term after term), communicating new and changing business rules and processes, and other actions to ensure service quality will be resource intensive and costly.

4.   **The core offices of billing, aid and student records/registration could remain distinctly separate organizationally but be located to the same building.**
 • Why not?  While this solution will mitigate the long distance students currently travel between Sproul Hall and University Hall, this will not address the expressed concern of student's being able to go to a single student service point to resolve issues rather than being referred between separate offices.

## III.  IMPACT AND STRATEGIC ALIGNMENT

A. Describe how the proposed solution aligns with the OE goals:
- Reduce administrative costs and enable the campus to direct more resources to teaching and research
- Advance an effective and efficient operating environment
- Instill a culture of continuous improvement that leads to high quality performance and outcomes

> The proposed solution reduces redundancy and consolidates resources to create an effective and efficient operating environment. A one-stop service model demonstrates that the campus is invested in providing a welcoming, supportive student experience and is willing to devote resources to instill high quality performance standards. In addition, staff will be able to develop a broad knowledge base that that will enable them to better engage in problem identification and resolution, not just at the individual student level, but at the root cause in situations that are systemic and pervasive. This ability to cease operating within a functional silo will further contribute to continuous improvement.

B. Identify any other anticipated benefits in implementing the proposed solution.

> 1. **Improved communication and synergy**: Communication and synergy between functional areas will be improved, resulting in faster resolution, and proactive rather than reactive identification of individual student issues.
> 2. **Different offices are maintaining separate student FERPA authorizations to release information to parents/families and third-parties.** This is frustrating to parents/families. The service center could manage one release process, which could be facilitated by the portal and information that is proposed to be available to parents/families online.
> 3. **Core offices focus resources to behind-the-scenes processes that are currently delayed.** For example, rather than a turn-around time of weeks and sometimes months for a financial aid appeal or residency determination, re-directed resources could reduce the turn-around to a more reasonable period. This will increase operating efficiencies and reduce the number of student follow-up inquiries.

C. Identify the risks of not implementing the solution.

> 1. **Desire for single point of service:** During the OE data analysis of student needs, it was clearly identified across all student types (i.e., grad, undergrad, international, professional school, etc.) that there is the strong desire for a single physical service point on campus in which to conduct their business. They didn't like being referred to web sites when they wanted to speak to someone about their individual situation and they didn't want to walk all over campus to an office location only to be told that they needed to go to a different office that was often a 10-15 minute walk away. They also noted that many offices now have shortened service hours due to staff cuts, and visiting the offices could be at the sacrifice of class attendance. There is risk to the success of the OE effort if it appears to students that their feedback has been ignored.
> 2. **Potential for future service reductions:** Central student service offices may not be able to sustain the current level of service should there be future budget cuts. This will result in further student/parent dissatisfaction with the student's overall educational experience.
> 3. **Impact on our brand image:** With the increasing cost of attending college, as well as the continued scrutiny from external stakeholders (e.g., state legislators) on the financing of higher education, the Cal brand image of the top public institution is at risk as the value of a student's education is called into question. The One Stop Student Business Center will help improve the overall experience that students have, thus helping to better the brand image of UC Berkeley.

D. Describe the constituency that is intended to benefit from the proposed solution (e.g. students, faculty, staff, 1-many units)

> 1. All students (grad, undergrad)
> 2. Parents and other third-parties supporting a student's educational experience
> 3. If any resources are identified as a savings as a result of consolidated services could be redeployed to back-end operations, the unit's moving functions to the one-stop center will benefit with increased operational efficiencies and more satisfied work force.

E. Describe the extent to which this proposed solution is a collaborative effort either within campus or with external partners.

Campus units with functional activities that are performed by the one-stop center must collaborate on defining scope of services, system access, staffing levels and skills, and cross-training, service delivery standards, and communications with students/parents (web sites, emails, etc. describing the services). The one-stop center will be the face of the quality of the campus's student service delivery. Units with a functional investment in the center will need to collaborate to ensure customer satisfaction and successful operations.

F. If applicable, describe how the proposed solution may enable additional projects to be considered.

There are two projects that have an impact on this recommendation: 1) the student portal (one-stop web site for students) and 2) the content management system. It is recommended that student business activities be fully functional in the student portal as a first priority. Once that solution is adopted by students and parents, the need for a one-stop in-person service center should be developed in alignment with the on line services available. Students expressed a desire to connect with a human – but not always in-person. They simply want to ask questions and receive answers about their individual situation. The method of communication could be via the telephone, live internet chat, email, or other means that are not face-to-face; it complements the self-initiated, automated processes that are in place in the on line/virtual community. This will have an impact on how the one-stop is staffed, what services delivery methods they provide and the scope under which they will operate.

If the student portal is not able to be fully functional, work can still be done towards developing a One Stop Business Center. A comprehensive business plan can be created that includes strategies for improving the business functions for students and parents/families. Work could be changed to allow for parallel development of these services – beginning by bringing them together physically, then modifying technology services as they are developed via the student systems roadmap implementation.

**This initiative should be MANDATORY for participation for the Registrar, Billing & Payment Services, and Financial Aid and Scholarships Office.**

G. What is the impact of the proposed solution on the existing systems and processes? Does it eliminate the need for existing systems and processes?

The communication processes used to intake and respond to student inquiries related registration, aid and billing transactions will be streamlined and standardized. Rather than maintaining multiple email accounts, phone lines, and other communication channels, the process by which the student/parent will conduct an interaction with the campus will be consolidated and redundant processes eliminated.

H. What is the impact on the proposed solution on the workload?

| Profile/Impact in hours | Current Workload | 1-time workload requirement | Ongoing workload requirement |
|---|---|---|---|
| Student – Simple Question via Phone | 7 min/call<br>Hold time: 3 min<br>Talk time: 4 min | n/a | 5 min/call |
| Student – Complex Question via Phone | 30 min/call<br>Hold time: 3 min, but to multiple offices<br>Talk time: 15 min, but to multiple offices | n/a | 7 min/call<br>One call to one office with highly knowledgeable staff and efficient systems |
| Staff – Central Office | Staff currently work 40+ | Initial increased hours | A conservative estimate is |

| | hours in various offices, dedicating various amounts of time to serving students through various methods. | through training and meetings to coordinate the One Stop Center implementation. | that advisors to students may reclaim 5-10 hours per week once the One Stop Center is fully operational. |
|---|---|---|---|
| Faculty | n/a | n/a | n/a |

# IV. WORK PLAN AND PROPOSED SOLUTION DESIGN

A. Provide a statement of:
- Deliverables — results the solution must deliver to achieve the stated objectives.
- Constraints — factors that may limit the options for providing the solution (*e.g., an inflexible deadline*).

**Deliverables:**

**Phase I**
- Charge a transition team to conduct a "deep dive" to assess the business key practices that need to be adapted in order to improve service to students, as well as to determine the physical needs to support a One Stop concept. The transition team should include a broad constituency of staff, as well as student leaders.

**Phase II**
- Conduct a pilot program after identifying the physical site location/space including furnishings, computer equipment, copier, scanner, phones, etc.
- Staffing plan and assessment of skill set required to effectively respond to and resolve student inquiries
- Sufficient number of hired, skilled, trained staff
- Robust customer service interface tools to support and manage a heavy volume of customer interactions. Tools may include email account, telephone call routing system, technology for live chat, system to manage scheduling appointments with off-site personnel. Tools should also facilitate gathering of data for performance metrics and tracking activity volume
- Ticketing system to escalate cases that require further review and resolution to appropriate staff (back-office or other); sufficient staffing in the back-office(s) to support this new function
- Service Level Agreement (SLA) between various campus partners – clarification of mission and customer-service goals

Phase III
- Implement changes and re-evaluate the success of the pilot program consider and recommend additional services/information to be provided through the One Stop Business Center, leading to possible expansion of services (i.e., inclusion of additional services in the business model), and leveraging completion of technology tools from the student service roadmap.

**Constraints:**
- Identification of an appropriate physical location
- The functional areas proposed for the one-stop center are aligned in different control units. Buy-in for the final solution will need to be negotiated.
- Many current systems that will be used by the one-stop center are inefficient and difficult to use. Access and permissions may be limited n order to effectively implement the systems within this center.
- Many of the functions that will be served by the one-stop center are impacted heavily by government regulation, institutional policies, and appropriate controls (i.e., aid eligibility, separation of duty, etc.). We must remain mindful of these regulations and strive to continue to provide better service within these constraints.

B.  Provide a work plan for the proposed solution with high-level steps to complete the solution, including timeline. (Try to limit your plan to no more than seven steps.)

| | MILESTONE | TIMELINE |
|---|---|---|
| 1. | Phase I: Charge a transition team to guide the assessment work for building a One-Stop Business Center; conduct a detailed business process analysis to determine the services and functions that should exist within the center | September 2011 – March 2012 |
| 2. | Phase I: Determine the necessary staffing model for the One-Stop Business Center, including the knowledge base, cross-training needs, and communications tools and protocol. | January 2012-May 2012 |
| 3. | Phase I: Craft a comprehensive business plan to include all aspects of a successful center, including identifying a physical space, (e.g., equipment, telecommunications, network, computers, system accesses), staffing needs (including a timeline for hiring and training staff), marketing campaign, and an assessment and evaluation plan. | May 2012-September 2012 |
| 4. | Phase II: Create website of one-stop center and provided services, remodel existing space to house the center, and market the center to students and parents/families | September 2012-January 2013 |
| 5. | Phase II: Open the center for business with a pilot program | January 2013 – May 2013 |
| 6. | Phase II: Evaluate center and recommend changes to enhance services | May-July 2013 |
| 7. | Phase III: Implement changes and re-evaluate (assessment and evaluation will be continuous); consider and recommend additional services/information to be provided through the one-stop center | August – December 2013 |
| 8. | Phase III: Expand the services of the One Stop Business Center (possibly including additional services) based on the evaluation and completion of technology tools developed from the student systems roadmap. | January – May 2014 |

C.  What are the data requirements for the proposed solution?

> Access may be needed to:
> - ProSAMS (Student Aid System)
> - Myfinaid (Web based Financial Aid System)
> - Registration System/URIS/DB2
> - CARS (Campus Accounts Receivable System)
> - Sallie Mae e-Bills
> - Bear Facts / Student Portal
> - BFS: Accounts Payable
> - GLOW (Graduate Division Awarding System)
> - DSAS (Departmental Student Award System)
> - Glacier (International Student Tax Withholding)
> - Housing
> - Emergency Loan
> - Work-study

D.  What are the technical requirements for the proposed solution?

The solution is not technical in nature. However, setting up a new physical office site with integrated access to various systems that currently may not be supported outside a local network raises issues around permissions, roles, accesses (i.e., network firewalls, access to secured data, etc.). These will need to be resolved in order to fully realize the intended design.

The current front-line functions of the proposed functional areas are not using a ticketing system. A robust ticketing system for escalating cases and issues will be required.

Ultimately the center will heavily on the tools proposed in the Student Service Initiative's request for enhanced technology.

E. What are the greatest risks for the proposed solution and the plan to reduce or eliminate the risks.

|  | RISK | MITIGATION PLAN |
|---|---|---|
| 1. | Proposal for fully functional one-stop center may be ambitious given current lack of integration of related campus student systems | 1a. Monitor activities to replace/upgrade back-end systems; adjust plan accordingly; 1b. Monitor activities to provide robust and integrated information for staff view via the student portal; adjust plan accordingly. |
| 2. | Management/staff in the functional areas to be combined in the one-stop center may be resistant to an organizational change or new manner of doing business | 1a. Obtain buy-in from senior management early in the change process; 1b. Seek staff input throughout the change process; 1c. Maintain open and frequent communication with the staff. |
| 3. | The amount and type of cross-training needed to deliver quality customer service may be under-estimated. | 1a. Assess scope of services to be provided in relation to student/parent expectations; staff accordingly; allow for extended training period; 1b. Communicate expectations from sr. management of service delivery performance standards; 1c. Provide regular updates from functional areas. |
| 4. | Sufficient separation of personnel duties could result in liabilities if job descriptions and structure are not reviewed for compliance with government regulations. | 1a. Ask Price-Waterhouse-Cooper (or other auditor) to review new structure and job descriptions for compliance with government student aid regulations. |
| 5. | Some offices that now advise and support students may lose connections with students if they use the one-stop center to address all their needs. | 1a. Provide frequent and regular communication between the management of the one-stop center and the management of the functional areas on observed and anticipated student service issues. |

F. How does the proposed work plan allow for evaluation and course correction to ensure the outcomes meet the campus needs?

The success of the one-stop center is based on its ability to deliver accurate, timely information in a complete and courteous manner. Center management will establish performance goals and develop work plans for achieving them. Success will be measured via:

1. On-going customer satisfaction surveys. These could be formal annual surveys as well as informal on-site comment card surveys at the one-stop service center, survey options presented on the one-stop web-site, etc.
2. On-going analysis of performance management statistics derived from robust tools to monitor and track phone, email and in-person service interactions (i.e., amount of time waiting in line, time in telephone hold queue, turn-around time for email response, etc.)
3. Staff satisfaction surveys (i.e., wellness and burnout; job-based knowledge; workload)

# V. CHANGE MANAGEMENT SECTION OF ADVISING TECH TOOLS RESOURCE REQUEST

A. What is the change management plan to successfully implement the outcomes of the proposed solution?

The proposed solution of a physical one-stop location at which students can make inquiries or complete business related transactions will require extensive planning between several functional offices that currently provide front-line services to students/parents.

- A project leader will be identified who is knowledgeable of the functional areas and the issues that address.
- A manager for the one-stop center will be hired.
- The project leader will serve on as a consultative basis to the manager throughout the implementation phase. The project leader will coordinate infrastructure details, such as space, furnishings, equipment, etc.
- A steering group of subject matter experts will be formed to advise and assist the manager as he/she defines the mission, goals, scope and services of the one-stop center.
- As the breadth and complexity of responsibilities of the one-stop center are defined, the manager will identify appropriate staff members.
- A training plan will be developed, with intensive training on systems and on-the-job training for at least one semester.
- Job aids will be developed.
- Performance evaluation will be ongoing.
- A ticketing system to route/escalate issues will be installed and configured.
- Procedures will be documented and maintained.
- Performance metrics will be monitored and corrective action taken as necessary.
- A process for regular two-way communication between the one-stop center and the functional department will be designed and implemented.

B. What incentives and/or disincentives are proposed to influence behavioral changes necessary for the successful outcome of the proposed solution?

**Incentives:**

1. **Increased job satisfaction:** Staff in the one stop center will feel more confident that students have the information and tools necessary to meet their needs. They will be able to focus more effort on working with students with high-level issues, rather than mundane, logistical issues. Additionally, as a result of the increased efficiency amongst and between the different departments, staff will have the opportunity to expand on the services they provide because of the time saved from inefficiencies.
2. **Student satisfaction:** Student/parent satisfaction will increase because of the support they have in solving their issues.
3. **Balanced workload:** Staff workload is more manageable and allows them to persist in their job despite organizational changes and other work environment difficulties (e.g., reduced budgets, no salary raises). Further, a balanced workload allows staff to allocate time and energy towards proactively addressing student concerns as opposed to purely reactive, urgent functions

**Disincentives:**

1. **Time and resources:** It takes time and resources to understand a new system. During the transitional process, there might be confusion on what to do and how to problem-solve an issue. Not only will staff have to learn more resources and how to better serve students, but students will have to patient as well and readjust to a new way of handling the business functions of their organizations.
2. **New skill acquisition:** Some staff may not be motivated to change their work structure, as it will require effort to learn new    skills and may take them out of their comfort zone.

C. Who has been identified as the change leaders and implementers to carry out the changes necessary for the successful outcome of the proposed solution?

**Change Leaders:**

- Sponsors of the Student Services Initiative:  Harry LeGrande, Cathy Koshland, and Gibor Basri.
- Management leadership in Student Affairs (Registrar's Office and Financial Aid & Scholarships Office)
- Management leadership in the Controller's Office (Billing and Payment Services)

> **Implementation Team Member Recommendations:**
>
> - Members of the Student Services Initiative team and extended team members (e.g., Steve Sutton, Joyce Sturm, Roberta Johnson)
> - IT staff involved in the planning and implementation of the CalCentral portal
> - Other key leaders from Student Affairs and other Student Services offices that handle transactions (e.g., RSSP, Parking & Transportation)
> - Student representatives (at least 2, one Undergraduate and one Graduate)

## v. FUNDING MODEL AND BUDGET

A. Could the proposed solution move forward with partial funding? If yes, describe the revised scope, including the associated savings impact.

> Any of the alternatives identified in Section II C above could be implemented if only partial funding were available. Preliminary steps include:
> - Identifying a training model that effectively works
> - Determining the resources needed to train (costs, time)
> - Identifying potential locations for a One Stop Student Center
> - Identifying hours of operation for a One Stop Center
> - Determining if current staff have the ability to take on additional responsibilities
> - Researching technological solutions (e.g., increased accessibility via the student portal)
> - Determine feasibility of temporary alternate work schedules for current staff to provide enhanced service when students are available.

B. What is the plan for sustainable funding to support ongoing operations of the proposed solution?

> Preliminary steps include:
> 1. Determine feasibility of the technological solutions and on-going support
> 2. Determine feasibility of alternate work schedules for current staff to provide enhanced service when students are available (i.e., increased service hours).
> 3. Include a location for the One Stop Center in the Lower Sproul Renovation.

C. Please download and fill out the OE Resource Request Budget Template located at [location] and follow the instructions on the first worksheet in the workbook to complete the budget ant line descriptions. Include both completed sheets with the Resource Request.

# VI. ASSESSMENT PLAN

Please use the table below to detail your metrics.

| METRIC CATEGORY | SPECIFIC MEASURE | MEASURE BASIS | DATA COLLECTION METHOD | DATA COLLECTION FREQUENCY | FUNCTIONAL OWNER OF DATA COLLECTION | LARGER GOAL TO WHICH METRIC RELATES |
|---|---|---|---|---|---|---|
| *EXAMPLES:* | | | | | | |
| *FINANCIAL PERFORMANCE* | | | | | | |
| *1 Reduction in average price of office supplies* | *Avg price* | *Per item* | *Look at vendor catalogs* | *Quarterly, first day of each quarter* | *Procurement Director* | *Overall reduction of 15% in average price of office supplies* |
| *OPERATIONAL PERFORMANCE* | | | | | | |
| *1 Reduction in average processing time per transaction* | *Avg person-hours required* | *Per transaction* | *Survey of transaction processors* | *Semi-annually* | *Director of Billing* | *Reduction of 20% in average transaction processing time* |
| | | | | | | |
| **FINANCIAL PERFORMANCE** | | | | | | |
| | | | | | | |
| **OPERATIONAL PERFORMANCE** | | | | | | |
| **1 Average time phone caller spends on hold** | Avg # of minutes | Per call | Automated Call Distribution telecommuni-ation system | monthly | One-stop Center Manager | Average hold time not to exceed two minutes during non-peak times |
| **2 Reduction in number of incidents student/parent is referred to another office** | Number of referrals | Per service contact | Tracking by staff | Weekly | One-stop Center Manager | Reduce number of referrals by 20% within first semester of operation |
| **PRODUCT / SERVICE QUALITY** | | | | | | |
| **1. Streamlined process for completing business transactions.** | Average time to complete the transaction | Per student (i.e., customer) | Survey of students served | Semi-Annually | One-stop Center Manager | Students will indicate a high level of satisfaction with the services provided by the One Stop Student Business Center |
| **2. Student perceptions that their inquiries are answered correctly the first time.** | Accuracy and completeness of answers received | Per student (i.e., customer) | Survey of students served | Semi-Annually | One-stop Center Manager | Students will indicate a high level of satisfaction with the services provided by the One Stop Student Business Center |
| | | | | | | |
| **EMPLOYEE SATISFACTION** | | | | | | |
| **1. Staff indicate a high level of satisfaction with their work environment in the One Stop Center.** | Rating on "job quality" scale | Per employee | "job satisfaction" survey | Semi-annually | Leader/committee charged with implementing the one stop center | 80% satisfaction level with staff that work in the one stop center |
| **2. Staff retained that work in the One Stop Center.** | Level of staff retention | Per employee | Exit surveys administered to staff | As required | Leader/committee charged with implementing the one stop center | Staff will not identify the one stop center as their reasons for leaving or transferring |
| **CUSTOMER SATISFACTION** | | | | | | |
| **1 Increase student satisfaction in obtaining** | Satisfaction score | 5 point rating: Extremely | Survey of students | Annually | One-stop Center Manager | Overall satisfaction rating of 4 or 5 |

| | | | | | | |
|---|---|---|---|---|---|---|
| **answers to business-related questions** | | Unsatisfied (1) to Extremely Satisfied (5) | | | | |
| **2 Increase parent satisfaction in obtaining answers to business-related questions** | Satisfaction score | 5 point rating: Extremely Unsatisfied (1) to Extremely Satisfied (5) | Survey of students | Annually | One-stop Center Manager | Overall satisfaction rating of 4 or 5 |
| | | | | | | |
| **PUBLIC RESPONSIBILITY** | | | | | | |
| **1** | | | | | | |
| **2** | | | | | | |
| | | | | | | |
| **SUPPLIER PERFORMANCE** | | | | | | |
| **1** | | | | | | |
| **2** | | | | | | |