OE RESOURCE REQUEST APPLICATION

University of California, Berkeley

I. SPONSORSHIP

A. Initiative

Initiative	Student Services		
	Anne De Luca		
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B. Sponsorship for Implementation

Sponsor Name	Delphine Regalia, Acting Controller		
Sponsor Signature		Date	
Sponsor Name	Cheryl Resh, AVC and Director of Financial Aid and Scholarships		
Sponsor Signature		Date	
OE Program Office Signature		Date	

C. Give the title of the resource

Enhancing Current Financial Planning and Bill Paying Tools

II. PROBLEM STATEMENT/CASE FOR CHANGE

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

1. Students lack a consolidated view of fees, financial aid, and payments, and thus are confused.

All students are billed for registration fees and, usually, a variety of other educationally related charges for attending school. A majority of students receive some sort of financial assistance (e.g., scholarships, fellowships, loans) to help pay for the charges assessed by the campus, as well as outside costs (e.g., books, off-campus housing). Because there are several online sources that display a student's financial activity, they are confused about how the web sites relate to each other and this prompts questions about data integrity. Furthermore, expenses for other auxiliary services (e.g., parking permits, Cal 1 Card deposits, library fines) are outside any systems/processes that give the student an overall view of 'how much it costs to go to school.'

2. Since not all web sites are updated at the same frequency, the timing of transactions leads to confusion.

Due to the inconsistent and delayed information about financial activities, students do not know or understand what action, if any, they need to take. The financial activity can change daily (e.g., new charges assessed to the billing account, awards eligible for disbursement). Selected information is displayed online the same day, but the billing statement which brings together the transactions in a meaningful way is updated monthly. Students expect to see a real-time status of their financial activity: what aid has been released to them, what charges are paid, how much is owed, etc. The current displays do not provide sufficient up-to-date details for the students to

understand the activity or to know if there is a problem/action that needs their attention.
3. Parents* lack a consolidated and real-time view of students' financial activities. Many parents assist students with applying for financial aid and paying for educational expenses. Currently, parents cannot see billing, payment or award disbursement activities between monthly statements. Parents would like one web site through which they can access real-time and complete financial information. * We recognize that some students have grandparents, guardians, 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.
4. Parents lack one secure logon to access student financial activities and updates between monthly statements. In addition, students must grant permissions to release information in various lo Currently, with proper authorization from the student, parents can create a unique logon to see the monthly e-bill statement and a separate but unique logon to see the financial aid package. However, parents struggle with maintaining several logons and passwords and navigating various web sites. Students would like one process that allows them to grant the necessary authorizations to release specific and selected information to those they identify.
5. There is no single, standard process for students to grant FERPA release. In order to grant the proper FERPA authorization to release information, students must complete forms or follow online processes in multiple locations. This is confusing for the students and parents, compromises the service delivery and creates the risk of inconsistently enforcing compliance with FERPA requirements.
6. Aging systems are supporting critical functions. The underlying systems performing critical functions of registration, fee assessment, receivables management, billing, and aid disbursement are on obsolete technology, have limited capabilities and are costly to support. It is resource intensive to maintain day-to-day operations and make enhancements in order to keep pace with increasing demands. Knowledgeable programmers are becoming scarce. Obtaining data from the systems for either display through web front-ends or for reporting for decision making is cumbersome or simply not possible.
7. Systems are difficult for support staff to learn and use. Staff who perform duties related to funding, billing or servicing students access the back-end systems directly (rather than through a web interface) to gain information about a student's financial situation. They must use multiple systems, various screens, and many log-in IDs. Synthesizing the data to identify the source of a problem is complex and time consuming, if they can even access it at all. Staff would be able to work more efficiently if there was a single, modern solution through which they could gain all the information needed to perform their responsibilities related to student financial activities.

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

1. Basic Proposal – With Current Back-end Systems The OE Student Services initiative team is proposing a financial display on the student portal (currently in pilot) that would provide timely, detailed, and comprehensive information designed to assist students to better understand charges they are being assessed, payments made, aid offered, awards disbursed, and refunds issued. The solution will provide the information in a format that instructs students what actions they need to take (if any). In addition, the portal will host a FERPA-compliant interactive tool that will manage authorizations by the student to release information, as well as communicate via email with parents that the authorization has been granted/revoked. The view of the financial information will be made available to the authorized parent and to appropriate campus student services staff members. **2. Expanded Proposal – With Replacement of Back-end Systems** All services in the Basic Proposal would be provided, but with the support of robust back-end systems. The cosmetic display of information interfaced to the portal will only be as good as the data originated from the back-end functional systems (e.g., CARS, URIS/Registration, ProSAMS, GLOW, HCM). The basic portal solution will have unavoidable limitations until the back-end systems (CARS, URIS/Registration, ProSAMS, GLOW) are upgraded or

significantly reprogrammed. These limitations include the inability to process incoming data for "real time" display and the compilation of data from incongruous interfaces between systems.

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

1. <u>Maintain status quo</u>. Each office functionally responsible for financial data (e.g., Billing and Payment Services, the Financial Aid and Scholarships Office, Graduate Division, Registrar's) could continue to administer and display data on separate web sites. To minimize the confusion related to timing, the web sites could be coordinated to update on a standard day of the week or month. Students can assimilate the information or call the offices for explanation.

- Why not? Maintaining multiple web sites is inefficient and costly.
- Why not? Does not address the expectations for real-time information all in one place.
- Why not? Reduces the impact of discrepancies due to timing, but does not address issues with understanding how the disparate pieces of information fit together to form the overall financial picture or give the student/parent sufficient indication of any needed action.

2. <u>Expand Bear Facts</u>. Several data elements are already displayed on Bear Facts. However, several others are not. Bear Facts could be enhanced to provide the desired additional financial information. A staff view already exists.

- Why not? Campus IT has determined that Bear Facts is on aging technology and plans to replace it with the portal.

3. <u>Expand current vendor services provided by Sallie Mae Business Office Solutions or utilize another outside vendor</u>. Currently, student monthly e-bills are hosted by Sallie Mae Business Office Solutions. Sallie Mae also manages the process for parents to view the bills. Data elements can be expanded and provided more frequently to Sallie Mae or another vendor in this market space.

- Why not? There are limitations to the functionality provided by vendors. Hosted solutions are designed to meet the common needs of the majority of users. The campus may need to compromise on the desired capabilities of the final solution if constrained to functionality provided by the vendor.
- Why not? The campus would have less control over defining and prioritizing enhancements as needs change. Vendor enhancements are usually based on the needs of the majority of clients, which may differ from the campus's. An alternative may be customization, which is costly.
- Why not? Students, parents and staff would experience a disconnect between interacting with campus-based web sites and the information on the hosted site. For example, students would still need to interact with a campus site to accept their financial aid, but then transfer to the third-party site to see if it paid. Handing off data to a third-party introduces risks of delays, inconsistencies, and loss of control over performance.
- Why not? Further assessment is needed to consider the risks created when sensitive student data is handled and stored by a third-party.
- Why not? Cost: Vendors typically charge a fee per account hosted, transaction handled and/or record stored. These costs may be prohibitive in a real-time, transaction-laden environment.

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

Providing a robust, comprehensive tool by which students and authorized third-parties can view, understand and take action on the student's financial relationship with the University will allow campus student service providers to reduce time and resources expended in answering questions. In today's instant electronic age, providing information on any time frame less than real-time is sub-standard to norms and expectations. Moving to one web site through which students will conduct business with the campus demonstrates the value service providers place on delivering effective processes which allow students to take care of the more mundane, but essential, business aspects of getting an education. Easing the chore of handling business activities allows students to direct more time and energy to the real reasons they are here – to fulfill their academic goals and gain the skills and knowledge needed to become contributing members of society.

In order to achieve this vision of an effective and efficient environment for students/parents/staff to manage student business transactions, it is essential that the back-end systems churning through the transactions are also efficient and capable of producing quality data in a timely manner. While the current systems may be able to make modest steps towards meeting the goals of this proposal, it is recognized that ultimate fulfillment of a real-time display with nimble, complete, and self-explanatory information will not be possible unless the back-end systems are upgraded to robust, modern technology.

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

1. **Students and Parents:**
   - Student and parents would have a more satisfactory service experience and a positive impression of the student's overall educational experience.
   - The availability of a clear and up-to-date self-service portal would further reduce the need for students to engage in a more time-consuming service contact.
2. **Student Services Staff:**
   - Providing all student service staff with a real-time web view of student financials will reduce the learning curve and allow for more efficient delivery of service.
   - Staff can better address the more complicated 20% of all inquiries or be redeployed to making behind-the-scenes processes more efficient, if 80% of the inquiries now handled by student service staff can be redirected to a self-service portal.
3. **IT:**
   - Partial savings due to discontinued maintenance support for financial data displays in BearFacts.
4. **Campus at large:**
   - The campus will benefit by attracting outstanding students because it will demonstrate the value it places on student-centric solutions. Most universities have upgraded their back-end systems and provide robust self-service solutions to their students/parents. Berkeley's reputation as a leading institution is judged in part on the service it provides to its students.
   - If students/parents can obtain more timely and complete billing information, they will be more likely to pay promptly, thus improving the campus cash-flow and reducing costs associated with collecting delinquent and written-off accounts.

C. Identify the risks of not implementing the solution.

1. Providing real-time financial information was expressed as a high priority across all student profiles during the OE assessment phase. It came up consistently in student and advisor focus groups, surveys, and other input opportunities. Failure to deliver a solution that is in such high demand and will impact every student on campus would jeopardize the integrity of the OE effort.

2. Students and their parents may view the campus's lack of value on student services as contradictory to their own values and demonstrate their displeasure by withholding financial gifts or disparaging the campus's reputation. Many Berkeley students have siblings attending other schools who place a more concerted emphasis on overall student satisfaction and comparisons are made constantly.

3. Forestalling the replacement of the back-end systems introduces risks that the portal may not be able to provide the necessary information for the campus to execute core business functions, such as billing,

maintaining cash-flow, registering students, etc. Because the current systems were installed more than 20 years ago, the technology is obsolete and finding qualified programmers with the skills necessary to keep the systems running, let alone enhancing them, is an ever increasing challenge.

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

1. All campus students (grads and undergrads)
2. Parents with FERPA compliant authorization from the student
3. Staff in central student service units
4. Staff in academic departments providing student support

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

Student financial information originates with the Registrar's Office, Financial Aid and Scholarships Office, Graduate Division fellowships or fee remissions, the student's academic or hiring department, or the Billing and Payment Services office. In some cases, the technology support for the information is managed by the functional department; in other cases, central campus computing supports the systems that house the data and display it to the user. The problem is that the information presented in isolation is incomplete in helping students understand their overall financial situation. A collaborative partnership, not only in the technology used, but in the business rules that manage the handling of the financial data, is essential for meeting the goals of this solution.

Replacement of the back-end systems would require an extensive collaborative project to identify, assess and procure a solution through an RFP process. The billing system is used by major campus departments, such as the Registrar's Office, RSSP, UHS, Recreational Sports, as well as by several academic departments, all of which have a vested interest in an efficient student billing and collection process/system. Project leaders would collaborate with these offices to ensure the transactions they are creating in the system satisfy the expectations for timeliness and accuracy.

Finally, such a complex and encompassing solution could not be implemented without collaboration with the end users: students, parents and staff. Input from all constituencies would be sought.

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

The proposed solution of a coordinated and sophisticated display of student financial information should be considered in light of two major projects: 1) replacing the back-end systems, specifically URIS/Registration and CARS/Billing and 2) creating a physical one-stop student service center location. Other projects related to display of student financials via the portal include the possible Kuali concierge tool, a student financial literacy tool, a content management tool, and a 'Kaiser model' student record management tool.

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 proposed solution addresses the web site display of information to the end user. Providing financial information via the student portal reinforces that particular interface as the primary student resource for campus communications. However, the back-end systems that manipulate and store the data are at risk. The registration system, which determines and assesses fee amounts, and the billing system are obsolete (20+ years), cumbersome, and limited. In order to provide the real-time, detailed information required by the proposed solution, these back-end systems will need extensive re-programming. Even then, the full vision may not be realized. Replacement of the back-end database with modern technology would assure success of the proposed solution, but expands the expense and scope of the project.

Alternatively, if student financial information was housed and managed in the Enterprise Data Warehouse, the burden to support the portal may be lessened.

Staff in academic departments that provide financial support to students maintains laborious processes to award and track funding, respond to student inquiries, and assist students with navigating the various routes to maintaining a beneficial financial relationship with the campus. Current systems displaying financial information to student services staff are:

1. Department Student Awarding System (DSAS)
2. Graduate Division Awarding System (GLOW)
3. Financial Aid System (myfinaid)
4. Human Resource system (HCM)
5. Campus Accounts Receivables System (CARS)
6. Bear Facts (Registration fees, residency, enrollment status, blocks)
7. In-house department tracking/shadow system
8. BFS Accounts Payable
9. Glacier (International student tax withholding)

While most of these systems could not be eliminated, the resources to support these systems could be used more efficiently (e.g., less training, less time to gather data) if the service provider used an integrated web display.

The various campus departments creating transactions in the awarding and billing systems will need to assess their business processes and workflow in light of the potential for instantaneous display. Currently, if erroneous data is entered into the system, there may be opportunity to correct it before it is observed. In a real-time environment, this would no longer be the case. Occurrences of bad data would be identified instantly and prompt a surge in phone calls or emails demanding immediate corrective action and compromise the integrity of the campus systems.

To achieve optimal display of integrated financial information, it is mandatory that required data elements be made available from the various host systems.

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~~ Expectation/Goal
Student – No Aid (approx 33% of students)	15 min/semester/student Reviewing 2-3 web sites; Coordinating with parents to make payment.	15 min Become familiar with the portal interface	15 min/semester/student Reviewing 1 web site.
Student – Straightforward Aid	120 min/semester/student Reviewing several web sites; Contacting campus offices for information; Coordinating with parents to understand financial status.	30 min Become familiar with the portal interface	30 min/semester/student Entering 1 web site and navigating seamlessly to other sites that may need transactions.
Student – Complex Financial Situation or Funding Needs	300 min/semester/student Reviewing several web sites; Contacting several campus offices for information; Contacting campus offices several times for follow-up; Coordinating with parents to understand financial status.	30 min Become familiar with the portal interface	120 min/semester/student Entering 1 web site and navigating seamlessly to other sites that may need transactions; Contacting the correct campus office once for personalized assistance.
Parent – Of a Freshman	120 min/semester/student Reviewing several different web sites; Calling several different offices for information;	30 min Become familiar with the portal interface	30 min/semester/student Entering 1 web site and navigating seamlessly to other sites that may need transactions;

	Coordinating with student to understand financial status.		Contacting the correct campus office once for personalized assistance.
Parent – Of a Continuing Student	30 min/semester/student Reviewing 1-2 web sites; Coordinating with student to understand financial status.	15 min Become familiar with the portal interface	15 min/semester/student Entering 1 web site and navigating seamlessly to other sites that may need transactions.
Student Service Staff in Academic Department (GSAO, SAO)	120 hr/year/staff member Accessing 9+ systems to compile a picture of a student's financial situation; Responding to student inquiries.	30 min Become familiar with the portal interface	60 hr/year/staff member Accessing 1 primary web site and up to 3 supporting systems to understand student's financial situation and respond to inquiries.
Staff in Central Campus Department (FASO, Grad Div, OR, BPS)	10,189 hr/yr Accessing 9+ systems to compile a picture of a student's financial situation; Responding to student inquiries: phone/email; Responding to parent inquiries: phone/email; Responding to inquiries from staff in other departments.	30 min Become familiar with the portal interface	5,095 hr/yr Accessing 1 primary web site and up to 3 supporting systems to understand student's financial situation and respond to inquiries. Advising students on options for addressing personal circumstances.
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:

1. One online location with comprehensive real-time student-specific financial information from various sources.
2. Student view with CalNet logon.
3. Parent/authorized third-party view with appropriate logon.
4. Staff view with CalNet logon.
5. Comprehensive financial information to include (regardless of source):
   a. Awarded resources: Grants, scholarships, fellowships, travel reimbursements, loans, etc.
   b. Expenses: Registration fees, campus housing, meal plans, health services, recreational sports membership, photo ID replacement, aid adjustments, other miscellaneous charges.
   c. Payments: Made by the student, parents, or external third-party
   d. Refunds: Payments issued by the campus to the student
   e. Easy-to-navigate and detailed display of current aid package status
   f. Easy-to-navigate and detailed display of current billing account status
   g. Easy-to-navigate and detailed display of transaction history and how awards and expenses relate to each other
   h. Snap shots of transactions over a period of time (i.e., archived account activity statements)
   i. Campus payroll activity (possible phase 2)
   j. Integration with campus cash-based financial activity: Cal-1-Card debit, parking permits, parking citations, library fines, etc. (possible phase 2)

Constraints:

1. Current back-end systems lack capacity to handle and supply data in a detailed and timely manner.
2. Current back-end systems are beyond their useful life and need to be replaced.
3. Limited IT resources with appropriate skills.
4. Student financials is just one of several functional uses planned for the portal. A decision must be made to prioritize this functionality in relation to the other intended uses.
5. Inadequate IT resources or technological capabilities to manage parent access roles.
6. Functional subject matter experts with knowledge of the systems and processes must divide time between on-going operational activities and designing/developing new functionality.

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.	Determine if back-end systems should be replaced prior to designing interfaces to portal. Replacement requires separate project plan.	Month 1 – Month 3
2.	Identify source systems (current or replacement) for desired information to be displayed; prioritize data; develop interface and workflow	Month 3 – Month 6
3.	Design end-user displays for student, parents, and staff	Month 4 – Month 9
4.	Establish processes to manage roles, profiles, permissions, views (including parent/third-party)	Month 4 – Month 9
5.	Pilot solution and obtain broad feedback	Month 10 – Month 11
6.	Finalize solution and feeder system interfaces	Month 11 – Month 14
7.	Roll-out to all students	Month 15

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

The data must be real-time and fed from several sources, including CARS, URIS/Registration, ProSAMS, GLOW, BFS: AP, Payroll (possibly), Glacier (possibly) and a new system to manage authorizations to release information to third-parties. Alternatively, data may interface from the Enterprise Data Warehouse.

Data to be provided includes:

1. Unpaid charges
2. Paid charges
3. Pending awards/aid
4. Paid awards/aid
5. Payments made for bills
6. Payments made for (selected) cash purchases
7. Refunds
8. Calculated totals
9. Authorization to release information to named individuals

The proposed solution also requires sufficient data resources to support an authentication process for authorized non-student individuals to access a particular student's financial records.

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

A robust back-end system to capture, store and manipulate large volumes of data in real-time.

For additional technical requirements, refer to the overall portal project.

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

	RISK	MITIGATION PLAN
1.	Feeder systems may not be able to produce the required data	1a. Replace feeder systems with more robust technology 1b. Reduce scope of solution and optimize display of student financial information with the technology available
2.	IT resources for feeder system programming may lack sufficient time or skill	2a. Adjust budget to hire appropriate resources
3.	IT resources for portal development may lack sufficient time or skill	3a. Adjust budget to hire appropriate resources
4.	The system will be able to display 'what' happened with the financial transactions. It will not always be able to display 'why' the transaction happened. End-users with an expectation of understanding the 'why' may view the delivered solution as inadequate.	4a. Analyze business processes to distill the 'why' to be as obvious in the display as possible 4b. Craft information display to modify expectations 4c. Create web sites and marketing materials to define scope of information displayed and clear instructions for what actions to take if additional information is needed
5.	The real-time display of information can lead to questions. For example, when one particular award is decreased, but a new award is granted in replacement. If the transactions are generated separately, the students may only see half of the activity and criticize the system as confusing. The administrator of the source data must increase sensitivity to end-user display and enhance supporting business processes accordingly.	5a. Analyze, adjust and modify business processes and workflow to decrease impacts resulting from increased transparency of real-time display

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

The campus already has experience with displaying financial information to students and, on a more limited basis, to parents. This experience provides lessons learned, areas for improvement, what works and what doesn't. The work plan will involve early and frequent collaboration of various data owners and student/staff end-users during the display design and pilot phases.

V. CHANGE MANAGEMENT

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

A separate change management plan must be developed if replacement of the back-end system(s) is determined to proceed before the start of the portal financials project.

For the portal financials project:

- Sponsors for the implementation project will be the Controller and the Director of Financial Aid and Scholarship Office (in transition). Management in both areas has indicated commitment for the project.
- Student services personnel, functional owners of the data, portal owners, IT developers/programmers, and student representatives will form the implementation team to design the specifics of the display.
- The implementation team will communicate launch and progress on the project and its anticipated timeline to the various constituencies.

- Input from constituencies will be sought and incorporated as determined by the implementation team.
- A timeline will be established for piloting and rollout.
- Complete documentation of the solution will be created.
- The functional data owners will meet regularly as a steering group to review the effectiveness of the information display, address issues, and identify and guide opportunities for improvement.
- Customer satisfaction will be measured through feedback and survey mechanisms.

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

The ease of obtaining information will be incentive for students, parents and staff to use the system.

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?

Financial Aid and Scholarships Office
Graduate Division
Billing and Payment Services
Registrar's Office
Student Affairs Officers in campus departments
Portal IT developers
Portal owners
Programmers of feeder systems (CARS, URIS/Registration, ProSAMS, etc.)

VI. 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.

Yes, efforts could be made to enhance the display of student financial information without replacing the back-end billing system. However, this will yield limited functionality. Alternatively, the back-end system could provide data to the Enterprise Data Warehouse (EDW), which would then interface to the portal. When the back-end systems are replaced, the interface to the EDW would be affected, but the portal would remain unchanged.

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

Providing student financial information should not add to the cost of ongoing portal maintenance.

Funding will be needed for IT resources to program and implement any improvements to portal display or system interfaces.

Funding will be required to support solutions to:
1. Manage FERPA authorizations
2. Support parent/third-party authentication

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 and line descriptions. Include both completed sheets with the Resource Request.

VII. 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	Portal: Student Financials does not yield financial performance					
1						
2						
OPERATIONAL PERFORMANCE						
1 Reduction in number of inquiries to billing office	Number of inquiries per month	Per total of phone call and email	Count from phone system and email inbox	Monthly	Director of Billing	Reduction of 20% in number of inquiries over same month in previous year
2 Reduction in number of inquiries to aid office	Number of inquiries per month	Per total of phone call and email	Count from phone system and email inbox	Monthly	Director of Financial Aid	Reduction of 20% in number of inquiries over same month in previous year
PRODUCT / SERVICE QUALITY	DEFER TO OVERALL PORTAL PROJECT					
1 Portal outages will occur only during announced down-times	Number of minutes of downtime per month	Per minute	System records	Monthly	Portal Owner	Incidents of unplanned portal outages will be zero
2						
EMPLOYEE SATISFACTION						
1 Increased central campus service staff satisfaction in accessing student financial information	Satisfaction Score	5 point rating: Extremely Unsatisfied (1) to Extremely Satisfied (5)	Survey of staff users through portal	Annually	Portal owner in partnership with data functional owners	Overall satisfaction rating of 4 or 5
2 Increased academic student service staff satisfaction in accessing student financial information	Satisfaction Score	5 point rating: Extremely Unsatisfied (1) to Extremely Satisfied (5)	Survey of staff users through portal	Annually	Portal owner in partnership with data functional owners	Overall satisfaction rating of 4 or 5
CUSTOMER SATISFACTION						
1 Increased student satisfaction in accessing financial information	Satisfaction Score	5 point rating: Extremely Unsatisfied (1) to Extremely Satisfied (5)	Survey of students through portal	Annually	Portal owner in partnership with data functional owners	Overall satisfaction rating of 4 or 5
2 Increased parent	Satisfaction	5 point rating:	Survey of	Annually	Portal owner in	Overall satisfaction

satisfaction in accessing financial information	Score	Extremely Unsatisfied (1) to Extremely Satisfied (5)	parents through portal		partnership with data functional owners	rating of 4 or 5
PUBLIC RESPONSIBILITY						
1						
2						
SUPPLIER PERFORMANCE						
1						
2						