USD One Stop Student Center

Before and After

Today's Topics

o A little about USD

o Life before the one stop

o The decision process

o Creation – virtual and physical

o Life after the one stop – results, successes, & lessons learned

University of San Diego

- Private, Catholic Liberal Arts University

- Total Enrollment: 8300 students
  - 5490 undergraduates
  - 1525 graduate students
  - 1285 law students

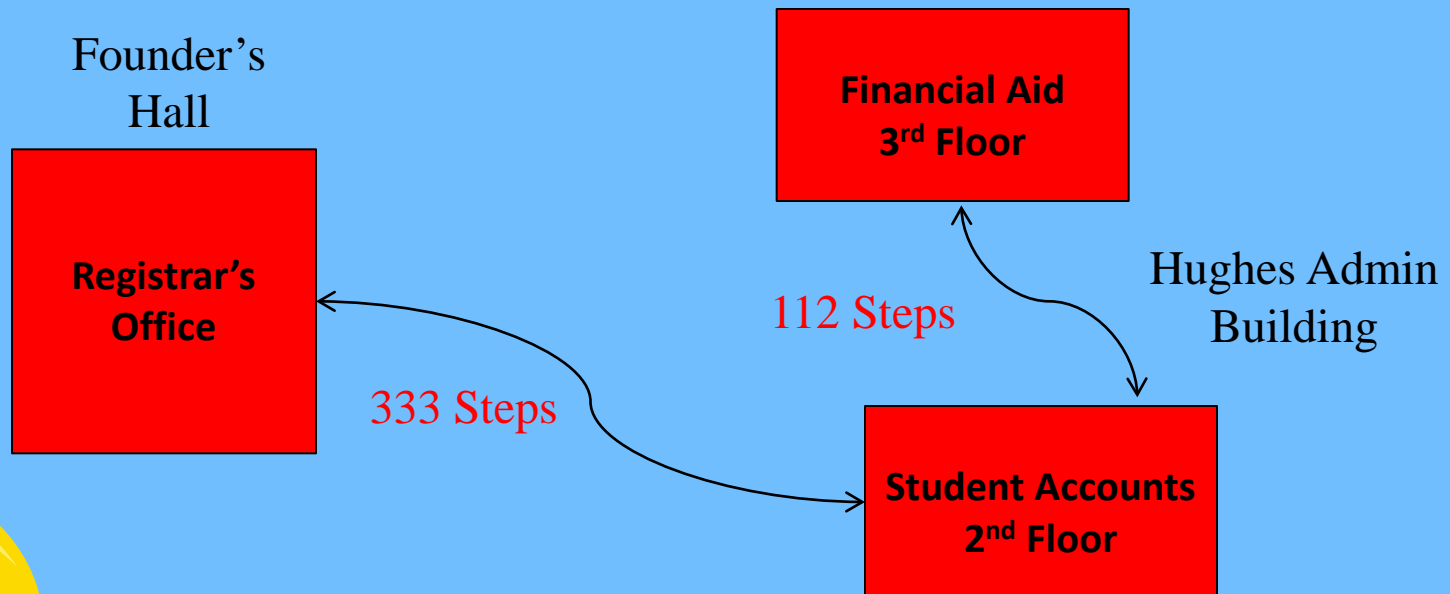- 90% retention for our fall 2012 freshmen return rate – a new high

The "Before" Picture

o Three separate home offices (Financial Aid, Registrar, and Student Accounts)

o Located in two separate buildings and separate floors

o Each office provided their own walk-in and telephone customer service

- Students waited in three separate lines
- Students felt they got the "run around"
- Customer service was inconsistent

The Transcript Example

Students walked many steps to request a transcript

Founder's Hall

Registrar's Office

Financial Aid 3rd Floor

Hughes Admin Building

112 Steps

333 Steps

Student Accounts 2nd Floor

Students ready to stage a tea party

Research for answers

o Conducted extensive student survey

o Focus groups

o Senior engineering project

o Formed a one stop task force

o Visited other one stops and attended ISSP conference

Task Force Recommendations

- o One Stop should be in the Provost division
- o Include functions of Registrar, Financial Aid, Student Accounts, Special Sessions, and Campus Card Services
- o Virtual one stop must become an immediate priority
- o Set service goal of 80% online & 20% in office; of the 20%, 95% served completely & 5% referred to home offices
- o Fund the One Stop positions by shifting budget for service positions from home offices to the one stop
- o Implement and utilize an imaging system

A One Stop concept is born
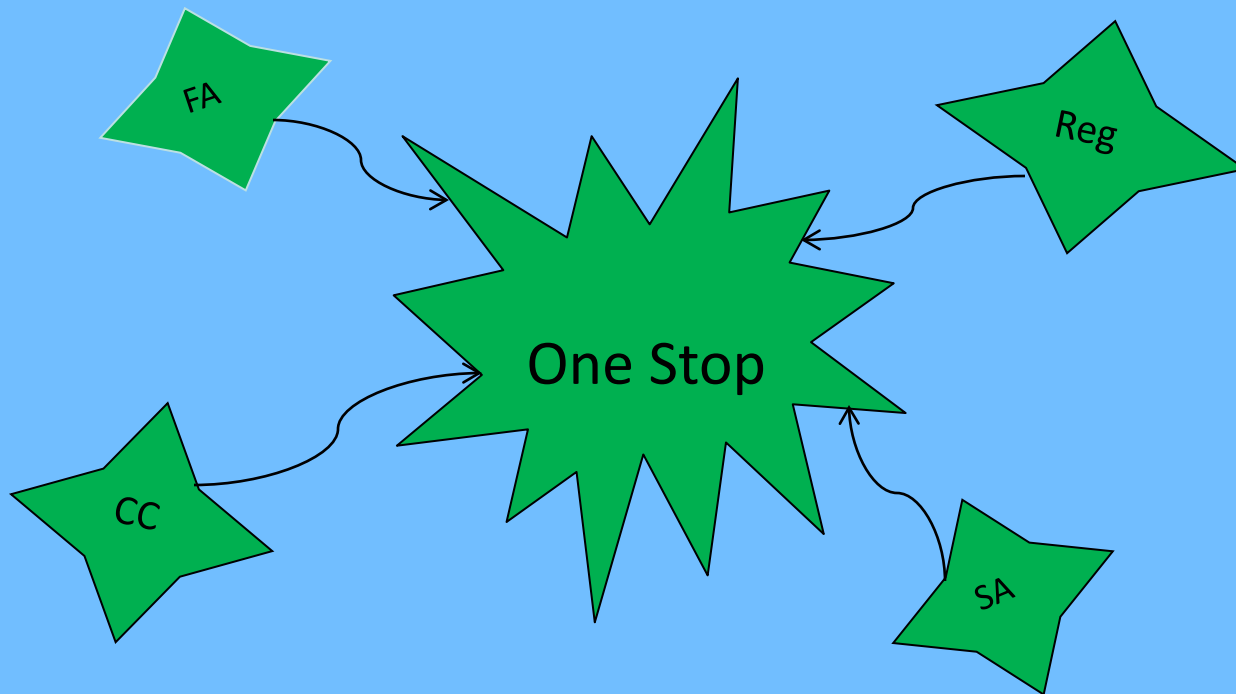
Timelines to Opening Day

Date	Goal
August, 2006	Hire One Stop Director
April, 2007	Virtual One Stop go-live
December, 2007	Staff interviewed and selected
February, 2008	Staff training begins
May, 2008	Banner go-live
August, 2008	Physical One Stop opens

Virtual One Stop

o Went live in May, 2007

o Established a One Stop Services tab on our portal using the Luminus portal product (Ellucian/Banner)

o Adopted slogan: "Save time – go online where you are always first in line!"

o Contains such routine services as:

  o Make payments, enroll in payment plans, and view bills

  o View and accept financial aid

  o Monitor financial aid status

  o Order official transcripts and print an unofficial version

  o Manage registration of classes and monitor academic progress

Virtual One Stop

Creating the One Stop Team

o Hiring philosophy: Hire the heart, train the brain
- o The innate willingness to serve students is more difficult to find than the necessary intelligence
- o Interview questions designed to seek out student-centric staff
- o Looked for the ability to make decisions in the gray area

o This would be the single most important step in creating the one stop operation

Training

o New One Stop staff still needed in their current positions in the home offices until July 1 (new FY)

o Designed 6-month schedule for training

  o Limited training to half days

  o Rotated OS staff every two weeks among home offices

  o Rotated training pairs so everyone worked with every member of the staff to form relationships and a team attitude

o Held each counselor accountable for their own training; did not have luxury of blaming poor trainers

o Held bi-weekly staff meetings to adjust training and to cultivate team spirit

One Stop Opens

o Office opened on August 8, 2008

o Operating hours: Mon-Fri 9:00 a.m. to 5:00 p.m., open until 6:00 every Wednesday

o Imaging technology used to view home office documents

o Most forms submitted by students to one stop office; no paper records in the one stop office

o Each counselor is empowered to handle any transaction

o Goals: 80% online and 20% in office; 95% completely served in one stop and 5% referred to home office; 90% of these are to the office of financial aid

Physical Office Space

o Welcome desk greets students as they enter office

- Staffed by executive assistant and student employees
- Quick transactions performed here

o Longer transactions are checked into the queue

o In our lobby:

- Seating for waiting customers and self-help computers
- Flat screens display students called from queue; also display TV programs to alleviate any waiting time

o Partitioned offices offer visual privacy but not audio

EXIT

H   G   F   E

VIRTUAL ONE STOP STUDENT CENTER

Printers 4 Computers for OneStop student business use ONLY. Thank you.

"Please see front desk to retrieve printed documents." Thank you.

Eddie Navarro

Kim Cam

Steve

Reception K

Arlene- E

1 and time: 11:00am 9-14-11

SONY

What We Do

o All front line processes of the three home offices

o Accept payments

o Other atypical processes performed:
  - o Student account special payment arrangements
  - o Limited academic counseling using DARS
  - o Housing & meal plan assistance
  - o New Veteran Students Coordinator position

o Strive for the absolute best customer service possible
  - o Customer service is a significant part of every discussion
  - o Part of annual evaluation; ongoing training

Successes

o Extensive training worth the pain - each counselor is equipped to handle 95% of questions with unparallelled customer service

o Team approach has been successful in minimizing stress and burnout among the staff

o Location a gift from the one stop gods

o Staff meetings provide excellent opportunity to discuss processes, continue training, and cultivate team spirit

o Students are ecstatic at solving so many issues in one place!

Lessons Learned

o More time should have been devoted to mapping current processes to make them more student-centric

o Organizational structure – all offices report to same person?

o Is co-location really necessary? We thought so at first.

  o We are more independent and less likely to refer to home office
  o Very difficult to find physical space for all four offices
  o The effect on the home offices of not seeing students

o Avoid implementing an ERP system at the same time

  o We implemented portal, Banner, <u>and</u> did extensive training – on two administrative systems!

Lessons Learned

o Relationships with home offices require a positive attitude, maturity, and excellent collaboration
  o As the new kid on the block, home offices can naturally be territorial. Be ready to respect and work with that.
  o If hiring from the home offices for budgetary reasons, be prepared for disappointment by those not selected
o Fully address all communication issues
  o Phones, emails, website, Facebook, etc.
  o Staff accordingly – phones and emails can add 3-4 positions
o If new to the campus, look deep to fully understand the campus culture – student-centrism, acceptance, etc.

Lessons Learned

o Consider taking payments for convenience of students

o Carefully map the flow of documents between offices

o Be sensitive to the staff's mental & emotional health

  o Possible issues: burnout, frustration, negativity, inconsistency

  o Ways to help: staff meetings, team (we're in this together) approach, humor, creature comforts, outreach opportunities

o Classify counselors as administrators – decision makers

o Obtain all necessary system access in advance

o Virtual one stop limited only by our imaginations

o Do as much outreach as possible across campus

After all is said and done...

L I F E   I S

GOOD

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Contact Information

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