1. Support Services Report Template

Report Info

Name of the person completing this report: India Christman Rodriguez
Title of the person completing this report: Dir. of Enrollment Planning and Matriculation
Supervisor/dean reviewing report: Linda Dalton
Name of second reviewer (if necessary): Greg Smith
Service: Transfer Admission (Domestic)
Division/College: Planning, Enrollment Management, and Student Affairs (PEMSA)

3. Mandated Service

Link to Scoring Rubric

1. Please indicate below if any aspect of the service is legally mandated by any of the following and provide the relevant reference.

State Law: Senate Bill 1440/Student Transfer Achievement Reform ACT (STAR Act)
Executive Order: CSU Admission Handbook and many new student enrollment management Executive Orders
Title 5: Title 5, Division 5, Subchapter 3 - Admission Requirements for CSU
Any other: CSU Enrollment Reporting System’s Operational Manual, and Assist.org
Federal Law: FERPA

Provide a brief explanation, if necessary, in < 60 words.

The Office of Admission follows the admission standards provided by Title V and the CSU Chancellor’s Office. For transfer admission this includes specific required college coursework, total credit units completed and a minimum GPA. In addition, residency determination guidelines are provided by the Chancellor’s Office which the Office of Admission tightly follows.

4. Importance of Service

Link to Scoring Rubric

Briefly describe the service in terms of its primary function(s) and purpose(s) using <120 words

The Office of Admission provides admission processing services for incoming domestic students. Admission staff process applications and related documents, determine residency, evaluate transcripts, render admission decisions, and proactively communicate with students in an accurate, timely and efficient manner. Attention to efficiency and detail serves the university by taking students from applicants to matriculants in numbers sufficient to meet overall enrollment goals. (Note: The International Admission Office oversees the admission process for non-U.S. residents.)

Link to Scoring Rubric

2.1 Who are the primary receivers of this service? (Please enter the percentage of each user group that is relevant)

Colleges/departments: 40%
Community outside University: 60%
Total: 100%

Link to Scoring Rubric

2.2 Please indicate the direct or indirect impact of the service on students for each of the three University Action/Student Impact Areas listed below (for example processing financial aid applications would be direct impact on students while
managing utility services would be indirect).

<table>
<thead>
<tr>
<th></th>
<th>Direct Impact on Students</th>
<th>Indirect Impact on Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Provide a brief narrative (<60 words each) explaining your selection for each area.

<table>
<thead>
<tr>
<th>Area</th>
<th>Evidence submitted to support the chosen selection (&lt;60 words for each)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td>The Office of Admission assists and supports prospective students through the college admission process. This includes receiving applications, processing transcripts and test scores, and rendering admission decisions. Staff proactively communicate requirements/deadlines to students, answer questions and provide guidance to students, parents, counselors/teachers and members of the community throughout the Bay Area, California and regional states.</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>The achievement of sufficient application volumes and efficient application processing gives the University the ability to admit only fully-admissible students able to succeed in their coursework ultimately aiding retention/graduation.</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td></td>
</tr>
</tbody>
</table>

Link to Scoring Rubric

2.3 Applying the four choices presented below, please indicate the consequence of NOT having this service on each of the actions in the left hand column.

<table>
<thead>
<tr>
<th></th>
<th>4 - Service provides evidence of direct impact in more than one area</th>
<th>3 - Service provides evidence of direct impact in one area</th>
<th>2 - Service provides evidence of indirect impact in more than one area</th>
<th>1 - Service provides evidence of indirect impact in one area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>

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<table>
<thead>
<tr>
<th>Area</th>
<th>Evidence submitted to support the chosen selection (&lt;60 words for each selection)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td>The Office of Admission delivers appropriate volumes of new students each quarter to meet CSUEB’s enrollment goals. Without this service, or without timely application processing, the university would not be able to bring in new students or meet enrollment goals.</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>Sufficient application volumes and efficient processing allow for targets to be met,</td>
</tr>
</tbody>
</table>
### 2.4 Alignment with Shared Strategic Commitments

How does this service contribute to or align with **any** of the eight Shared Strategic Commitments (SSC) listed below?

<table>
<thead>
<tr>
<th>SSC</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reinforce academic quality through open-minded inquiry, innovative teaching, engaged learning, and distinguished scholarship</td>
<td>The transfer admission process supports academic quality by applying adopted standards to all applicants (90 transferrable units, including the so-called Golden Four).</td>
</tr>
<tr>
<td>Enhance our inclusive campus, responding to the backgrounds and interests of our diverse community and promoting their academic, professional and personal development</td>
<td>Transfer enrollment grew 27% in three admission cycles - 1,500 in Fall 2010 vs. 1,900 in Fall 2012. Four cycle growth will be approximately 47% in Fall 2013. Through timely application processing, the Office of Admission enrolls qualified prospective students in numbers sufficient to meet CSUEB's overall enrollment goals.</td>
</tr>
<tr>
<td>Serve students first, by expanding access and enhancing each student's educational experience and prospects for success as a graduate and life-long learner</td>
<td>Cross-training, creative workflow and leveraging technology have been employed to handle the significant transfer application volume increase of 58% in four years with 8,200 applications in 2009-10 and nearly 13,000 applications received in 2012-13.</td>
</tr>
<tr>
<td>Foster a vibrant community through enriched student services and student life that support student engagement and learning</td>
<td></td>
</tr>
<tr>
<td>Contribute to a sustainable planet through our academic programs, university operations, and individual behavior</td>
<td></td>
</tr>
<tr>
<td>Continuously improve our efficiency, transparency, and accountability while practicing mutual respect, responsiveness, and collaboration across the University</td>
<td></td>
</tr>
<tr>
<td>Support the civic, cultural, and economic life of all communities in the regions we serve through partnerships that promote education and social responsibility</td>
<td></td>
</tr>
<tr>
<td>Demonstrate our continuing record of leadership and innovation in higher education, focused on 21st century skills, including science, technology, engineering, and mathematics (STEM)</td>
<td></td>
</tr>
</tbody>
</table>

### 2.5 How might the demand for this service change over the next five years? (Please choose one category below).

**Likely to increase**

Provide a rationale for your choice (assumptions, impact of new policy, etc.) in <120 words.

Through significant recruitment efforts in PEMSA, transfer application volumes have grown from 8,200 files (2009-10) to nearly
13,000 files (2012-13). This rapid 58% increase indicates application volumes will continue to rise at a sharp rate as interest in CSUEB grows.

In 2012, 82% of applicants were admitted by March 1; however only 23% of all applicants actually enrolled. This means the Office of Admission’s work volume is trending up at a steeper climb than the overall University community; however infrastructure and resources have not kept pace.

The self-support BSBA online program is also growing, which adds workload for transfer admissions. Further, transfer evaluators must also accommodate admission changes stemming from state law (SP 1440) or internal decisions like program impaction.

5. Quality of Service

3.1 Do you assess the quality of the service you provide?

Yes

If “Yes”, what benchmarks, best practices or measures of success, either internal or external, do you use to measure service quality (e.g., timeliness, accuracy, adequacy, meeting deadlines, satisfactory completion of assignment, etc.)? Please describe in <120 words. If no, please explain.

Quality is measured through:

1. Achieving new student enrollment targets within a desired threshold
2. Increases in applications received and admitted students choosing to enroll
3. Meeting internal processing benchmarks and deadlines
4. High level of student satisfaction (low complaints)
5. Responses to admission processing questions on new CSUEB freshman survey
6. Low error rate in evaluations, coding, etc.
7. Minimal petitions/appeals
8. Fast response rate on incoming inquiries (phone/email)
9. Successful collaboration (efficient, cooperative) with other CSUEB departments working with incoming students
10. Positive feedback from counselors, students, and the campus community.

3.2 During the last three years, have you adopted any measures to improve the quality of this service? Please describe in <120 words.

Measures include:

1. Workflow movement/speeds analyzed for benchmarks/deadlines.
2. Six transfer evaluators have a file load of approx. 2,150 applicants each. Staff process multiple terms at one time. To ensure high quality service one temp worker posts credit.

3. Staff training, quick reference guides, and enhanced communication (internal and to campus community) improved accuracy/information going out to applicants.

4. With the increased volumes and improved planning tools, exceptions to the admission standards are no longer needed to reach enrollment targets.

5. With Planning and Institutional Research, predictive modeling reports have started being used to better predict enrollment volumes for campus planning.

6. DCIE degree programs processed by a single staff person since files are complicated, time consuming and often urgent.

**Link to Scoring Rubric**

**3.3 What idea(s) do you have for improving the quality of this service within existing resources (e.g. development of benchmarks, surveys, feedback, etc.)? Please describe your plan(s) in < 120 words.**

As many of these ideas as possible will be implemented given the current staff resources limitations.

1. Automate email notifications from PeopleSoft as student coding changes.

2. Improve functionality of PeopleSoft allowing for the Admission Checklist to be comprehensive and easier to understand.

3. Code documents "received' at the time of imaging rather than as a separate step to prevent documents "slipping through the cracks."

4. Use the Data Warehouse for predictive modeling reports so Admission can better predict incoming student enrollments.

5. Find ways to get more student feedback for continuous process improvement.

**Link to Scoring Rubric**

**3.4 What ideas do you have for improving the quality of the service if additional resources were provided. Please describe your idea(s) in <120 words.**

Transfer Admission has the equivalent of 3 PEM Reps managing document processing/residency and 6 Evaluators making admission decisions. Efficiency, student satisfaction, and admitted student yield would improve if:

1. Expand staff to handle self-support (DCIE) programs, such as the BSBA online.

2. Professional staff to answer the phones/emails during business hours instead of temps/student assistants from 10 a.m. – 3 p.m. Monday-Thursday (current model).

3. More professional admission staff to evaluate files rather than having existing staff work extensive overtime.

4. More technical support staff dedicated to Admission for programmatic changes, running queries, and improving overall PeopleSoft functionality.

5. Workflow software to help with issues of work duplication and processing "slipping through the cracks."

**Link to Scoring Rubric**
3.5 Do you use any formal or informal process to assess the level of satisfaction of the service users?

Yes

If yes, describe the process and most recent results in <120 words. If no, please explain.

The new freshmen survey has questions about the admission process. It is likely that transfer students have similar opinions about the Admission process. Random surveys of transfers students have borne this out, however, we have not had the resources to conduct as thorough an examination of transfer students’ experience.

Link to Scoring Rubric

3.6 The university recently conducted a customer satisfaction survey for some services (results for this service are attached, if applicable). Do you have any comment or response to the results? Please describe in <120 words.

Students indicated Admission was an important service (4.40) with good quality (4.06). Staff had a similar opinion indicating a slightly higher level of importance (4.48) and slightly lower level of quality (3.97) – although it was still considered good.

Given the high scores on importance of service, and the existing resource limitation (both human and technical), the Office of Admission considers the score acceptable; however they do demonstrate room for improvement.

Link to Scoring Rubric

3.7 Do you have any formal or informal guidelines for personnel in your department regarding how to treat/interact with receivers of this service?

Yes

If yes, please describe in <120 words. If no, please explain

Guidelines include:

1. PEMSA is dedicated to a "culture of service" with routine customer service trainings.

2. Email templates and phone "scripts" used to ensure accurate information is conveyed by staff in simplified, complete, and "student-friendly" language.

3. Staff refer students to a petition and appeals coordinator to ensure issues are handled consistently and fairly.

4. Processing staff attend weekly meetings with managers to discuss procedure and protocol for processing files and handling student issues.

5. Routine email updates are sent to Admission, PEMSA and campus departments on student enrollment topics. "Open Door" meetings are held monthly sharing Admission processing updates.

6. Departmental policy and procedure is stored on a shared drive for all staff to reference.

Link to Scoring Rubric

3.8 Does your service have annual goals (targets) of achievement regarding the quality of the service provided?

Yes

If yes, describe the annual quality goals (targets) and indicate if the service achieved those goals (targets). Please provide evidence, if possible, in <120 words. If no, please explain.
New student enrollment goals are being met consistently and CSUEB's enrollment is stable - not declining. As a result, the Office of Admission now has the ability to hold students to all CSU standards for admission (i.e. no exceptions) without compromising the university's ability to meet Chancellor's Office targets.

Procedural consistency and policy enforcement consistency are always goals. In recent years both have improved significantly enabling staff to work faster, for students to be more satisfied with admission processing response time, and for campus departments who coordinate with Admission routinely to be pleased with partnership efforts.

### 3.9 Does your service have annual goals (targets) of achievement regarding the quantity of service provided?

Yes

If yes, describe the annual quantity goals (targets) and indicate if the service achieved those goals (targets). Please provide evidence, if possible, in <120 words. If no, please explain.

Quantity goals include:

1. Each quarter new student enrollment targets are set. It is the responsibility of the Office of Admission to ensure that processing moves swiftly to meet these numeric goals.

2. Benchmark processing volumes and calendared deadlines are set each quarter for document processing, transcript evaluation, and admission decision-making. Managers check in weekly to ensure workflow is moving accordingly.

3. Prior year(s) point-in-time processing comparisons are done weekly to ensure workflow is moving at the necessary pace to complete all files by internally set deadlines.

4. Policy and procedure adjustments are made routinely to ensure workflow moves faster producing more file processing output than the prior year.

### 6. Efficiency of Service (cost effectiveness)

#### 4.1 Using the spreadsheet provided for all employees in your department, please distribute salaries of individuals across all services provided to reach an educated or reasonable estimate of the cost of providing the service.

434187

*Attach your allocated spreadsheet here.*

Admissions Undergraduate & Graduate Allocations.xlsx

#### 4.2 Using the spreadsheet provided, please distribute your department's annual operating expenses across all services provided to reach an educated or reasonable estimate of the cost of providing the service.

3850

#### 4.3 Using the spreadsheet provided, please distribute the square footage of work space across all services provided to reach an educated or reasonable estimate of the use of this resource.
Attach your allocated spreadsheet here.

Admissions Undergraduate & Graduate Allocations.xlsx

Link to Scoring Rubric

4.4 During the last three years, have you adopted any measures to improve the efficiency (cost effectiveness) of providing this service (e.g. reducing salary costs, operating expenses or use of space, or increased output without increasing cost. Etc.)?

Yes

If yes, please describe the measures in <120 words. If this is a new service introduced over the past three years, please indicate. If no, please explain.

Measures include:

1. To improve staff processing speeds, students and temps answer phones on a reduced schedule.

2. The Office of Admission general email account was split into several accounts to spread the ability to answer emails.

3. EIC staff, select PEM Reps (admission document processing staff) and temp staff are cross-trained to do transcript evaluations during peak seasons.

4. Website and printed material reviews completed to ensure clear information is published.

5. New transfers eligible to enroll in classes before final transcript review is completed expediting enrollments.

6. Transfer Credit Evaluation moved to the Office of the Registrar (with three Admission staff) giving Admission the ability to focus on new applicants without stopping to do complex transfer credit evaluations.

Link to Scoring Rubric

4.5 What idea(s) do you have for improving the efficiency (cost effectiveness) of this service within existing resources (e.g. restructuring, merging, outsourcing, ways to cut costs, technology, etc.)? Please describe those ideas in <120 words.

As many ideas as possible will be implemented given current staffing limitations.

1. Programmatic coding changes in batches rather than individually/manually by staff.

2. Coding documents “received” when imaged rather than as a separate step.

3. Adjusting workflow reports that drive processing to be more efficient for staff to pull their own work and for managers to track work completed.

4. Greater use of auto generated PeopleSoft email messages based on applicant coding changes so manual message sending is no longer needed.

5. Simplifying PeopleSoft coding to reduce errors.

6. A dedicated SB1440 admission evaluator handling all aspects of the workflow from start to finish.

Link to Scoring Rubric
4.6 What idea(s) do you have for improving the efficiency (cost effectiveness) of the service if additional resources were provided? Please describe your idea(s) in <120 words.

Ideas include:

1. Professional staff answering phones (rather than temps/student assistants) provide more thorough and proactive answers and fix “issues” at the time of a call rather than passing the student around.

2. Additional full-time evaluators would result in faster workflow, more consistent processing speeds and procedures, less errors, and elimination of the need for constantly training temps and “helpers.”

3. Additional technical support could do programmatic “global” changes to student files rather than having many highly trained/specialized staff doing high volume clerical coding.

4. Workflow software would ensure all files are addressed in an organized and timely fashion without applicants “falling through the cracks.”

5. Electronic workflow for DCIE program evaluation since it is time consuming and often urgent.

Link to Scoring Rubric

4.7 Do you have any plan(s) to improve the efficiency (cost effectiveness) of this service in the next 1-2 years (e.g. reducing costs, increasing productivity, etc.)?

Yes

If yes, please specify whether these plan(s) involve reducing salary costs, operating expenses and/or use of space. Please describe your plan(s) in <120 words. If no, please explain.

Plans include:

1. Continued attention to administrative business process, workflow, policy and procedures.

2. Creating a “lead” staff person to help student assistants and temps answering the phones know current policy and protocol.

3. Bringing more “temps” and “extra hands” from other PEMSA areas into the workflow if hiring additional admission staff is not an option.

4. Offering monthly admission information updates, and regular email updates to PEMSA and other campus departments to ensure everyone is providing accurate and consistent information to applicants.

5. Using the new Pioneer Data Warehouse to create customized reports for staff to pull their own work in lieu of workflow software.

6. Further coordination with EOP and Housing to streamline processing.

Link to Scoring Rubric

4.8 Please describe the estimated output for this service for fiscal year 2011-12, quantify if possible (e.g. volume, service tickets resolved, people serviced, appointments, etc.) in <120 words.

Approximately 7 applications must be processed by admission staff to yield one enrolled transfer. The average transfer application has 2.8 colleges transcripts requiring evaluation.

In 2009-10 cycle approx. 8,200 transfer applications were received and processed. In Fall 2013 alone, more than 10,000
applications have been received and processed to date. This rapid four term application volume increase (58% in 4 years) will likely continue and stretch resources thin - even if enrollment volumes needed by CSUEB to reach targets do not change.

7. Other

Link to Scoring Rubric

5.1 Are you aware of services similar to this one that are being provided by another department at CSU East Bay?

Yes

If yes, please provide a list of those departments. How are the services described here similar or different? Please describe in < 60 words.

The International Admission Office oversees application processing for students with international transcripts. They are to supposed to follow the same admission standards as the Office of Admission.

EOP does admission processing; however, they do their processing in a stand alone Access database. The Office of Admission does the manual processing/coding of their applicants in PeopleSoft.

Link to Scoring Rubric

5.2 Is there anything unique or distinctive about your service? Please describe what is unique or distinctive in <120 words.

In addition to being the office that oversees the administration of admission standards, the Office of Admission reinforces academic quality by highlighting CSUEB’s strengths; recruiting qualified students who can benefit from these programs; promoting a college going culture; offering clear information regarding admission requirements so that students are able to meet criteria and deadlines; and providing timely and accurate data for evaluations.

Continuous attention to administrative business processes, fostering a “Culture of Service,” and providing on-going staff development and cross-training enables the department to provide a high-volume of service within limited resources.

Link to Scoring Rubric

5.3 Are there any additional things about this service that you would like the task group to know? Please describe/explain in <250 words.

It is important to note that although the university’s new student enrollment has grown in small increments, the total number of applications received (requiring processing) has climbed at a very steep rate. In addition new mandated programs like SB 1440 (the STAR Act), major-admission based programs like the online Business Administration degree completion program, and the unpredictable term open/closed policies driven by funding challenges, have added more layers to the already complicated procedures in admission processing.

This rapid transfer applications volume increase (58% in 4 years) has resulted in stable CSUEB enrollments, the ability to tightly adhere to published admission standards, and a broader state-wide reach of students enrolling at CSUEB. All of this has been achieved with the same number of processing staff and some very creative workflow strategies.

Through the Planning for Distinction process, it is the hope of the Office of Admission that the overwhelming workload increase will be highlighted alongside the fact the department’s size and infrastructure/technical tools have remained the same.