1. Support Services Report Template

Report Info
Name of the person completing this report: Debbie Chaw
Title of the person completing this report: Executive Director of Advancement Services & Foundations
Supervisor/dean reviewing report: Ara Serjoie
Service: Switchboard
Division/College: University Advancement

3. Mandated Service

Link to Scoring Rubric

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

Federal Law: N/A
State Law: N/A
Executive Order: N/A
Title 5: N/A
Campus Policy: N/A
Any other: N/A

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

4. Importance of Service

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

Live switchboard operator service is provided Monday through Friday from 8:00 am - 12:00 noon and 2:00 - 5:00 pm. Outside of these hours, the switchboard is on automated answering mode with a voice response system (VRS) directing the caller through various options. The primary function of the live operator is to answer incoming calls; greet callers; provide information; and transfer calls to appropriate department. Automated voice response system is intended to direct caller to appropriate department.

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)

   Students: 60%
   Faculty: 10%
   Community outside University: 10%
   Other: 20%
   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>

**Pre-college (helping students to enter the system)**

Calls from prospective students (or parents) are generally related to enrollment and financial aid. These calls are routed to PEMSA for answering. It is important that callers have a good customer-service experience when first contacting the university.

**During college (helping students succeed while they are at Cal State East Bay)**

Calls from students (or parents) are generally related to enrollment, financial aid, and general administrative functions. These calls are routed to PEMSA or the appropriate department for answering. For many students, time is of the essence when trying to secure information about classes, financial aid, etc.

**After college (helping students establish meaningful lifework and be socially responsible contributors to society)**

No impact.

**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>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td></td>
<td>✓</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>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>

**Provide a brief narrative (<60 words each) explaining your choice.**

<table>
<thead>
<tr>
<th></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>At a minimum, a VRS is needed on the university’s main phone line in order to direct prospective students (and parents) to PEMSA or appropriate department. Having a user-friendly VRS (or live operator) makes the campus more accessible to people seeking information.</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>At a minimum, a VRS is needed on the university’s main phone line in order to direct students (and parents) to PEMSA or correct department. Having a user-friendly VRS (or live operator) makes the campus more accessible to students.</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>No impact.</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>Shared Strategic Commitments</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>N/A</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>N/A</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>Contributes by providing a vehicle for students to access or obtain campus information through a phone call.</td>
</tr>
<tr>
<td>Foster a vibrant community through enriched student services and student life that support student engagement and learning</td>
<td>Contributes by providing a vehicle for students to access or obtain campus information through a phone call.</td>
</tr>
<tr>
<td>Contribute to a sustainable planet through our academic programs, university operations, and individual behavior</td>
<td>N/A</td>
</tr>
<tr>
<td>Continuously improve our efficiency, transparency, and accountability while practicing mutual respect, responsiveness, and collaboration across the University</td>
<td>N/A</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>N/A</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>N/A</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 stay the same

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

Even though most of the information provided to callers can be found on the university's web site, people still call the campus' main phone line directly because they may not have direct access to the internet at the time of the call, they can't find the information on the university's web site, or they believe that a phone call is faster and will lead them directly to their answer in a quicker time frame. If improved information sharing/distribution and/or technological advances in obtaining access to data occurs, then the demand for this service may decrease.

## 5. Quality of Service

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

- No

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.

As far as I know, the switchboard does not have software that measures the normal service quality metrics used for “call centers.” Having the student operator attempt to track these metrics (avg. call time, avg. hold time, number of dropped-calls, accuracy as measured by call backs, etc.) manually would be cumbersome with the results being more qualitative than quantitative.

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

No.

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.

Although developing benchmarks or surveying users would help us gauge the current service quality and lead to service improvements, there are things that can be done now which will improve the service. Since the live operator uses the university’s web site to access information, having accurate current online directory information (e.g., phone number and room location) for faculty and staff is required. Divisions/departments need to answer the phone during normal business hours so that callers are not frustrated when the call is transferred to the division/department. Current information related to campus events, etc. should be given to the live operators. The phone tree on the voice response system needs to be reviewed for appropriateness and relevancy.

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.

An updated phone and/or voice response system with a more user-friendly phone tree is needed if an automated system is in place. If live operator service is required, then expanding the hours to cover normal business hours from 8:00 am to 5:00 pm should be considered. This would require hiring more staff (or students.) The improvements listed in 3.3 are still needed with live operator service.

The switchboard is just a vehicle by which a person seeking information makes contact with the university through a phone call. A person can also find information online or visit the campus in person. I believe the management of this should be consolidated under one umbrella like the Welcome Center.

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.

Switchboard operators will report major caller complaints to the supervisor so that management is aware and can rectify the situation to avoid similar complaints in the future.

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.

None was conducted for this service.
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.

The live operator is trained to think that she/he is the “Voice” of the university and needs to set a positive tone for the first interaction a caller may have with us. Informal guidelines for live operators is to answer the incoming call as quickly as possible; be friendly and courteous to the caller (even if the caller becomes irate); listen to the caller to understand what he/she is requesting; look up the information on the university’s web site when necessary; and, provide the most accurate information as possible to the caller.

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

No

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.

There are no annual goals. The live operators make every attempt to answer the calls and provide the requested information as quickly and efficiently as possible.

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

No

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.

There are no annual goals. The amount of calls answered is directly correlated to the number of calls received. For fiscal year 2012-2013, live operators answered approximately 25,500 calls. The number of calls answered by the automated voice response system from 12:00 noon - 2 pm or outside of normal business hours is unknown to me.

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.

22562

Attach your allocated spreadsheet here.

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.

0
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.

137

Attach your allocated spreadsheet here.

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.

For the past 2 years, we have employed student operators and a part-time retired annuitant to staff the switchboard. This has reduced salary costs by about $5K exclusive of any benefits. Please note that the cost of providing this services does not include any expenses incurred by IT for the maintenance of the phone system itself.

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.

Eliminating live operators and going with a fully updated automated voice response system (VRS) could be implemented should the university decide having a live person to answer the main campus line is not a campus priority.

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.

I do not know if additional resources would improve the cost effectiveness of this service since we really do not know the true cost of providing this service.

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.)?

No

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.

I do not have any plans. However, the university may have plans once it decides how it wants to handle incoming calls to campus.

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.

For fiscal year 2012-2013, live operators answered approximately 25,500 calls. The number of calls answered by the automated voice response system from 12:00 noon - 2 pm or outside of normal business hours is unknown to me.

7. Other

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

No

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

N/A

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

This service is highly dependent on other departments and units. If information is not current on the university's web site or is not provided to the live operators, then they will not be able to respond appropriately to the callers questions. Additionally, if departments do not answer the call when transferred, i.e., the phone keeps ringing or there is no ability to leave a voice mail message, then the service would appear to the caller to be ineffective.

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.

This service is "managed" by University Advancement in that the executive director of Advancement Services and Foundations supports the staff member responsible for hiring and supervising the live operators. The executive director does not "own" the service, nor is she (or should be) an expertise in voice response systems, and phone trees, etc. Managing a switchboard operation does not fall under the usual responsibilities of an advancement services director or manager.

This service should be reviewed by a campus-wide task force to determine the goal and purpose of the service, the best practices for providing such service, and the processes and systems needed to provide an efficient and effective service that meets the campus and customers' needs.