1. Support Services Report Template

Report Info
- Name of the person completing this report: Darrell Haydon
- Title of the person completing this report: Associate Vice President Financial
- Supervisor/dean reviewing report: Brad Wells
- Service: Charge and collect fees for University services
- Division/College: Administration & Finance

3. Mandated Service

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

State Law: Education Code Sections: 89700-89701.1 and 89705-89709

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

University fees represent obligations to the State of California and are required to be processed in the manner stipulated by statute.

4. Importance of Service

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

The division of finance is responsible for maintaining a system of records to charge students for instructional services and associated fees as required by State law. If a student’s account is not satisfied by individual or financial aid payments finance personnel conduct collection efforts as required.

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

- Students: 75%
- Faculty: 5%
- Administrators/staff: 10%
- Colleges/departments: 5%
- Other: 5%
- Total: 100%

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>Impact Area</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>
</tbody>
</table>
After college (helping students establish meaningful lifework and be socially responsible contributors to society)

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>Direct - Fees are listed and maintained on outward facing websites allowing prospective students to appreciate the cost of attendance and explore any financial aid options necessary.</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>Direct - Finance staff enables classes for a new term for students to register and incur charges, but also to progress with course work towards completion.</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>Direct - Upon exit from the university finance staff meets with some students that have loans that require follow up actions to assist graduates in starting their post college career. If balances remain on a student account after the student has left the university collection efforts continue as required.</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>Area</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>![Tick]</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>![Tick]</td>
</tr>
<tr>
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<td></td>
<td></td>
<td></td>
<td>![Tick]</td>
</tr>
</tbody>
</table>

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</tr>
</thead>
<tbody>
<tr>
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<td>4 - Student fees and revenues related to fees comprise almost 80% of the resources flowing into the university each year. Activities conducted by the university must be paid for therefore without fee charges and collections the activities of the university would cease.</td>
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</table>

Link to Scoring Rubric
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>Reinforce academic quality through open-minded inquiry, innovative teaching, engaged learning, and distinguished scholarship</th>
<th>Fee collections are estimated and allocated to the university annually to support the activities of the university allowing the academic community to focus on academic quality.</th>
</tr>
</thead>
<tbody>
<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>Fee collections are estimated and allocated to the university annually to support the activities of the university one of which is to provide for academic, professional and personal development.</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>We serve student first by enabling class listings for them to participate in, online accounts listing fees and charges as well as links to financing options so that financial hardship will not delay their education.</td>
</tr>
<tr>
<td>Foster a vibrant community through enriched student services and student life that support student engagement and learning</td>
<td>We interact with the students daily regarding various fees charges and payment and are very much a part of student life.</td>
</tr>
<tr>
<td>Contribute to a sustainable planet through our academic programs, university operations, and individual behavior</td>
<td>The student system is an electronic repository providing complete support for the student account balance. We maintain these records electronically to reduce the storage footprint, errors and waste that paper records would perpetuate.</td>
</tr>
<tr>
<td>Continuously improve our efficiency, transparency, and accountability while practicing mutual respect, responsiveness, and collaboration across the University</td>
<td>We are constantly striving to enhance the information available to student about their accounts to improve efficiency, transparency and accountability.</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>Fee collections are estimated and allocated to the university annually to support the activities of the university allowing the university community to support the civic, cultural, and economic life of the regions we serve.</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>Fee collections are estimated and allocated to the university annually to support the activities of the university allowing the university community to demonstrate our commitment to continuing our record of leadership and innovation in higher education.</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.

While headcount will fluctuate overtime causing an increase or decrease in traffic enhancements to automated systems allows us to increase the number of students and student accounts served without a similar increase in staffing needs.

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.

In many cases, the transactions are based on documentation so that the activity can be verified for accuracy. When that is not the case, quality is measured based on the number of corrections.

Link to Scoring Rubric

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

To enhance the quality of our services, the student system was recently retrofit to include the activity of the continuing education programs. This standardizes the outward facing pages for any students that are accessing both matriculated and self support programs. This project streamlined our business processes improving the quality of our services by providing a more consistent and cohesive set of policies and procedures regarding fees and collections.

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.

We are currently exploring various metrics to gather and maintain so that we will be able to demonstrate the quality of our services with facts and figures. Additionally we are working towards improving the quality of our services by enabling the use of mobile apps so students could access their account and remit payment on a handheld device.

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.

With additional resources and cooperation of the PEM units we believe the quality of our services would be improved by changing our business processes as necessary to use existing functionality in the software to automatically send students emails to keep the students up to date on the status of aid, due dates and other events related to their student account.

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.

We continually look for ways to make our services accessible. Most of our methods are informal - open forums, meetings, comments, etc.

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.

The survey was for the Cashier’s component of this support program and reflected the high level of importance and quality that is essential for this activity. Overall usage is low since the majority of our customers don’t need to actively interact with the Cashier’s or interact using online services.

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

There is an informal expectation to treat all individuals with respect and courtesy. In addition, we strive to be as helpful as possible in problem resolution while we note the cause of the problem to recognize those areas where we could provide better communication around policies and procedures.

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.

We use various measures to create annual quality goals related to the student accounts. For example, the analysis of accounts receivable allowances shows that fewer accounts are in arrears than has occurred in previous year. The campus Perkins default rate is used to gauge the effectiveness of our communications to exiting students related to their financial responsibilities. Finally we use metrics to gauge the quality of our service by tracking the number of customer contacts and status at the end of the contact as resolved, referred to other department or as an open item.

Link to Scoring Rubric

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.

We use metrics to gauge the quality of our service by tracking the number of customer contacts and status at the end of the contact as resolved, referred to other department or as an open item.

6. Efficiency of Service (cost effectiveness)

Link to Scoring Rubric

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.

855917

Attach your allocated spreadsheet here.

2010-11 Expenses - Charge and collect fees - Financials.xlsx

Link to Scoring Rubric

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.

233842
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.

2249

Attach your allocated spreadsheet here.
Space AF Finance.xlsx

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.

To enhance the quality of our services, the student system was recently retrofit to include the activity of the continuing education programs. This standardizes the outward facing pages for any students that are accessing both matriculated and self-support programs. This project streamlined our business processes improving the cost effectiveness of our services by providing a more consistent and cohesive set of policies and procedures regarding fees and collections.

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.

We will continue to strive to improve our efficiency by converting more students to direct deposit, which speeds their receipt of funds while lowering the transaction cost to the university, and by implementing mobile apps that will connect the student more readily to their account which we believe will speed fee collections while enhancing customer service.

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.

With additional resources and cooperation of the PEM units we believe the effectiveness of our services would be improved by changing our business processes as necessary to use existing functionality in the software to automatically send students emails to keep the students up to date on the status of aid, due dates and other events related to their student account.

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.

The implementation of mobile apps will improve the efficiency of the service and may reduce operating costs by lowering collection costs.
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.

We expect to interact electronically or in person with each enrolled student several times over the course of each year.

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.

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

This service requires excellent customer service skills, knowledge of the basic accounting principles related to fee collections and accounts receivables and technical skills sufficient to interact with the automated software as well as the ability to communicate any change requests needed to technical support.

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 requires excellent customer service skills, knowledge of the basic accounting principles related to fee collections and accounts receivables and technical skills sufficient to interact with the automated software as well as the ability to communicate any change requests needed to technical support.