



## Administrative Service Delivery for Cal State East Bay Students

June 1, 2009<sup>1</sup>

Cal State East Bay's Academic Plan, adopted in February 2008, states the following:

*California State University, East Bay, one university serving different students in multiple locations – this emerging premise reflects CSU East Bay's commitment to access to higher education, particularly within the metropolitan region. ...*

*[T]he spirit of being one university calls for providing a parallel level of support for students at each location. While specific services may differ (e.g., residential programs would not be provided at each campus), each campus should offer the same quality of support. CSU East Bay may be able to place a full range of "self-service" administrative services online so that no student should have to stand in line in person for a campus administrative service, except by choice.<sup>2</sup>*

Cal State East Bay needs to think through our future student service delivery model for administrative business in the context of budget constraints, the specific needs of Concord and online students, and the forthcoming move of some student services at Hayward to the new Student Services and Administration Replacement Building. Because student service delivery is a university issue, a sub-set of the President's Cabinet put together a small group to prepare a conceptual draft for Cabinet review.<sup>3</sup> The details will take more time to develop and will need to draw more deeply into each division for input after we reach agreement at the conceptual level.

This effort clearly connects with efforts already underway with the online campus, online orientation, etc., and is intended to provide the broader framework for the university as a whole.

The administrative service delivery model needs to acknowledge that all students are important (special in their individual ways), and we address their needs accordingly. Yes, Concord students may have some different needs based on location than Hayward students, but so might online students (especially because only selected programs are available at Concord or online). On the other hand, most needs are based on other factors

---

<sup>1</sup> Approved for implementation by the CSUEB Cabinet, June 1, 2009.

<sup>2</sup> <http://www.csueastbay.edu/wasc/pdfs/AcademicPlanAsAdopted.pdf>, pp. 17-18.

<sup>3</sup> Members include Linda Dalton, Greg Smith and India Christman from PEM; Cathy Coulman and Ray Angle from Student Affairs; Nyassa Love and Carrie Medders from Administration and Finance; Cecilia Zefeldt from the Concord campus; and Raechelle Clemmons from ITS

– e.g., students needing remedial courses or financial aid – which do not depend on location. There are many groups of students for whom we want and need to give extra or tailored attention based not on where or how they attend classes, but based on what they bring with them to East Bay, such as veterans, athletes, EOP, SDRC students or re-entry students.

Please note that this paper focuses on administrative services, recognizing that some services may also be used by a student’s parents or other family members. Further, it recognizes that some students are also University employees. However, this paper does not address academic advising or counseling – although these services may also benefit from a parallel analysis. Finally, this paper assumes a developmental approach to using student services – that is, service delivery methods focus on helping students learn how to use administrative services efficiently and effectively so as to increase their self-confidence and reduce their dependency on being assisted by staff for most routine activities.

This concept paper addresses the following aspects of delivering administrative services to students consistent with the budget principle of “doing things differently” where possible so as to protect services or quality, and, in some cases, lead to better outcomes. Each aspect affects both the students and the staff who serve them.

1. Making online transactions the default approach for administrative business.
2. Balancing and scheduling face-to-face assistance for those situations that really need it.
3. Developing or re-developing the student/public reception areas in the SSARB and at Concord (in anticipation of the SSARB at Hayward as well as adjusting expectations at Concord) as the “Student Service Centers” for CSUEB. This needs to be done with a vision of coordinating the SIL’s function in PEM with reception and service delivery needs of Student Financials/Cashiers, AACE, IAO, Continuing Education, and other areas.

### Administrative Transactions Online for Students

The following basic requirements for online administrative services are based on the understanding that East Bay aspires to third generation student service technology, involving interactive transactions, not just access to static information on the web:<sup>4</sup>

- All administrative transactions should be web-enabled, including those requiring validation and authorization (such as signatures). This should be the most friendly, clear, efficient and preferred (default) way to conduct most transactions. This requires that information available to students on-line be accurate and trustworthy, and hopefully programmed to update and refresh as often as possible

---

<sup>4</sup> See the following website being used by ITS as a resource:  
<http://www.wcet.info/services/student-services/beyond/guidelines/overview.pdf>

(within 24 hours ideally). Examples include up-to-date billing information, accurate registration information, holds being correctly set or lifted, and mycsueb “to-do” lists.

- Online help should be readily available in various forms to address unanticipated questions and issues. Help should range from Frequently Asked Questions (FAQs) to step-by-step documentation to an online troubleshooting interface that would lead students through a decision tree to self-diagnose problems.
- Online help should provide concise information and direct students to the appropriate office should they be unable to resolve the issue online. To support online help, live chat functionality with appropriate support staff might also be made available.
- Because online services can be available 24x7, systems must be designed and staffed so that users can receive timely responses
- Effective online services require appropriate technical support.

The following research should be conducted to inform and guide us as we move from the conceptual to operational level:

- Each administrative service area at Hayward and Concord should list the reasons students come to talk to them in person. These reasons should be ranked so the team can begin finding ways to make the top items more online/phone appropriate. The team would work through the list in an effort to streamline as many services as possible.
- Our current online self-service systems should be reviewed and audited as well. MyCSUEB and CashNet are good, but could also use refinement. Specific issues that have come up include clear billing, the ability to pay on-line with VISA credit cards, and the use of the forthcoming OneCard – enabling the campus ID card to be used for more than just identification.
- In order to facilitate the processes outlined in the bullets above, and to ensure that there is on-going review and evolution of services informed by these processes and periodic review, a “Steering Committee for on-line services” should be set up (or more accurately re-activated) with student membership. This committee would be charged with monitoring and reviewing mycsueb, cashnet, blackboard and all other on-line services, and should include both prospective and current students as well as representatives of the key administrative areas that use on-line services.

As we move ahead, this means that we should think of most back office functions as potentially being based anywhere – staff may be located together where necessary for communication and in order to manage internal work flow, but identified with the University as a whole, rather than with Hayward, Concord or another location *per se*. Thus, a staff person might work on University business at an office in Concord, just as another staff member may telecommute from home. This could result not only in better service for Concord students but could provide space that is sorely needed and help promote a more environmentally friendly work alternative for those living near the Concord campus (or those working from home).

## Face-to-Face Administrative Service Assistance

Face-to-face service should be reserved for the more complicated situations and students who need the reassurance of this kind of interaction. Telephone services should provide a bridge between online and face-to-face service. Telephone assistance should be available during scheduled hours and/or for scheduled appointments, including conference calls for students with multiple issues. Thus, some student needs can be served through remote but synchronous transactions – e.g., through audio/video connections, with faxing capability, etc.

During peak periods (e.g., during orientation, registration, the first few days of the term) students needing more attention could be diverted from the primary flow of calls and services so as to minimize waiting for others. A triage approach could be used to address each student's immediate need or question and schedule a subsequent follow-up for more detailed discussion. Also, students needing time-sensitive assistance (e.g., removing a registration hold) should receive priority attention over students with more general questions or other needs during peak periods (e.g., advising for disqualified students can be scheduled after the end of the drop-add period as PEM does already). PEM already increases service hours and provides more staff in the Hayward SIL during some of these peaks – we may want to do even more of this, both in the SIL and the call centers in order to reduce waiting times for most students. Similarly, some SIL staff take responsibility for some back office work during the off-peak times.

PEM has experimented with this model a bit at Concord as well – with more Financial Aid advising hours at selected times during the quarter. The University will need to expand this notion in order to figure out how much face time we can support at each campus during peak times – how to schedule most efficiently to meet student needs and manage travel for staff. For example, PEM and other divisions/offices may want to assign some staff to work out of the Concord campus on selected days, handling telephone calls and back office work part of the time and being available for appointments or walk in assistance during specified hours.

We may wish to provide cross training and/or include other offices during these peak hours to provide pivotal back up to the online areas by those who have specialized knowledge (admission evaluation, AACE counseling) etc. In that manner we may be able to minimize students spending more time on campus going from office to office.

In order to explore how to balance face-to-face assistance with other needs, some items that must be addressed:

- We could examine a year's worth of phone stats and office visit stats (such as for SIL in PEM, Cashier's for Student Financials, IAO, etc.), compare these to the calendar, and see if we should be staffing-up at different times (first week of school for example).

- Also, it may be time to review PEM's SIL and Call Center hours (and comparable activities in other divisions) to see if they work for our students. Do the Call Center and SIL hours, for instance, need to be mirror images of each other?
- Areas outside of PEM are taking similar approaches to evaluating their work and delivery models, as with AACE replacing much of their appointment time with drop-in hours in order to effectively counsel students.
- Another option for the delivery of many of our services is the use of video, or voice-over PowerPoint presentations that can be posted online and/or delivered at key times to larger audiences (for the latter examples could be Financial Aid or the Disqualified Student Workshops, which could actually be all video or a combination of video and in-person speaking).

### The "Student Service Centers" of the Hayward and Concord campuses

When many student services at Hayward move to SSARB, we need to reconsider how the name of the SIL is used. It is currently misleading because at Hayward it refers to PEM's kiosk in the 1<sup>st</sup> floor of Warren Hall, but the Cashier's office is already in the lobby as well. It might make sense to introduce a new name with orientation for the new fall students, so that we start to change the identity before the move later next academic year.

One way to think about this is to have a name for the physical space in the SSARB where services will be located, and then have separate names for each kiosk or information counter. For example, the main lobby area might remain the Student Information Lobby and then the services in the space could have desks like Admissions, Records, Financial Aid, Continuing Education, Advising, IAO, and Student Financial Services. Students become confused when we don't use obvious or consistent names. For example Student Financial Services, Cashier's, and Accounting Office are all the same thing to a student but we use the terms interchangeably. Or departments say, "Go talk to PEM", but students refer to us as Admissions, Records, and Financial Aid. Consistent use of terminology to describe our services is critical in providing the best service to our students.

Even at a common location, students can continue to be offered the option of using self-serve work stations rather than stand in line. (A common central kiosk or station that handles all manner of student requests may continue to make the most sense at the Concord campus in particular.) Thus, we must keep in mind how to staff the face-to-face assistance functions. There are some helpful ideas and guidelines for the management of the central Student/Public Reception areas, including efficient signage, cross training of staff to facilitate quick answers, and the use of student assistants at key times to direct traffic.

The development of a group of representatives of all the key areas represented in the "Student Service Centers" might also be ideal for working on a set of "best practices" for service and for space. This group might visit other campuses to examine what has worked and not worked, both in terms of the physical space and the on-line space utilized at those campuses.