Creating a One-Stop Student Service Center

Nancy Sinsabaugh
Transformation in Higher Education, LLC
www.trhied.com

June 20, 2013

Copyrighted by Transformation in Higher Education, LLC
Transformation in Higher Education, LLC

- More than 20 years award-winning experience in student services (registrar, financial aid, bursar)
- NACUBO author: Student-Centered Financial Services (2007)
- Clients have included Stanford, Northeastern, and American Universities: Universities of Massachusetts, Minnesota, Indiana, Pittsburgh, among others
- Thought Leader: Educause Research Bulletin on Information Technology and Financial Aid
- BA and MBA from Harvard University
Agenda

- Innovations in Student Services
- What is a One Stop?
- Integrating the Traditional and Non-Traditional
- Case Studies
- From Vision to Reality
Innovations in Student Services

- **Adopt student (eliminate staff, silo) focus**
- **Building blocks**
  - People
  - Process
  - Technology
- **Goals**
  - Increase service levels
    - Fewer steps for students and staff
    - Paperless where possible
  - Maximize University investment in technology
  - Reduce costs
  - Improve employee morale
- **Customize solutions for the University**
  - University mission and goals
  - Student needs—meet students where they are
Traditional Student Service Models

Jacquelyn Nealon, Student-Centered Financial Services (NACUBO:2007) page 7

But Students Experience Our Services Horizontally
The Student Experience

Jacquelyn Nealon, Student-Centered Financial Services (NACUBO 2007) page 9
What is a One Stop? Three Components

1. Virtual (Self-Service)
   - Web (Find It, Do It, Get It)
   - Mobile devices
   - Automated communications

2. Physical (One Stop Student Services Center)
   - Student contact (cross-trained staff=generalists)
   - Walk In, email, telephone
   - Specialists (particularly in Financial Aid)

3. Back office (technology, process, people)
   - State of the art processing (technology driven)
   - Cross-functional connections
   - Paperless
Integrate the Traditional and Non-Traditional

One Stop
Registration
Student Records
Financial Aid
Student Billing

Traditional undergrad and grad
Continuing Education
Cohort Programs
On-line Programs
Other
What is a One Stop?
Key Success Factor: Business Process Redesign

- Admit Students
- Enroll Students
- Orient Students
- Bill Students
- Graduate Students
A Word about University Staff

- Staff *can* be cross-trained
- Separation of Student Contact and data processing responsibilities
- Empower staff to use technology tools
- Technology (not staff) bears transaction burdens
- Frees staff to help students
- Employee morale *always* improves
A Word about Technology

- Meet student expectations: what communications do they pay attention to?
- Maximize investment in integrated student services system
- Technology enables new models for student contact
  - Actual and Virtual “One-Stop” student service centers
  - Cross-trained student service staff
  - Merger of financial aid offices and student-centered bursar responsibilities

- Imaging and workflow
- Web tools (Find it, Do it, Get it)
- Customize to fit unique needs (portals)
  - Paperless financial aid offices
  - Electronic billing and payment
A Word about Change Management

- **Buy-In and Leadership**
  - Senior Level (President’s Cabinet)
  - Deans and Senior Staff
  - Mid-level Managers

- **Team Building**
  - Functional and technical
  - Break down silos

- **Empower functional staff**

- **Never underestimate the power of FEAR**
T.H.E. Approach

- **Solutions tailored to time-phased needs of the institution**
- **Specialty: empower staff to lead SS redesign effort**
  - Building cross-functional business process teams
  - Consultant as adviser/guide
    - Hands on initially
    - Pull away when team is able to lead the effort
  - Knowledge Transfer: staff become the experts
- **Connections with One-Stop community**
  - Whatever issues you may have, another institution has already solved it
- **FA expertise**
- **Examples to expedite decision-making**
  - Director and student contact staff job descriptions
  - Lists of services to be offered
  - List of processes to be redesigned
Case Studies in Transformation

- **Large mid-western public research university** 45,000 students on two campuses: no way to give students personal attention
  - Pioneered virtual One Stop before portals came into fashion
  - First “Paperless Financial Aid Office” in nation
  - From DOE penalties and disastrous SIS implementation to award winning best practice student service institution (PeopleSoft, now Oracle Campus Solutions)

- **Traditional small college transformed into international on-line university**
  - From a few thousand to more than 13,000 students
  - Inadequate utilization of Ellucian Colleague SIS
  - On-campus (stable population) and on-line (growing in numbers)
  - Significant One Stop involvement in Admissions and Recruitment

- **College turned University serving military and corporate markets**
  - Disastrous People Soft SIS implementation (manual FA awards for 11,000 students)
  - Weak web and non-existent self-service
  - Major player in distance learning for military and corporate clients, while maintaining undergraduate and graduate programs
  - First on-line MBA program
Your University

- Your mission
- Your vision
- Your challenges
- One Stop approach will work at your institution
Role of Eduventures/T.H.E

- Provide road map to get to launch
- Lead weekly meetings with Task Force
- Anticipate roadblocks before they are reached
- Resolve challenges as they arise
- Train client on business process redesign
Why Eduventures/T.H.E.?

- **Methodology**
  - Keep focus on critical path
  - Create structure with goals and deadlines
  - Facilitate meetings
  - Hold staff accountable

- **Provide experience objectivity**

- **Avoid common pitfalls**
  - Falling behind schedule
  - FA, FA, FA
  - Eye on the Prize: IT IS POSSIBLE!
Methodology

- **Phase I: Readiness Assessment and High Level Plan**
  - People, Process, Technology
  - Virtual Presence
    - Web site and Self Service
  - Operations
    - Registrar, Financial Aid, Student Accounts (Admissions, Advising)
    - SIS utilization
  - Student Contact
  - Assessment and Time-Phased Action Plan

- **Consultants time: 2-3 weeks full time**
Methodology

- **Phase II: Detailed Planning**
  - Steering Committee—project governance
  - Task Force—6 or 7 staff FT for 6 months
  - Readings
  - High Level Design
  - Sub-Committees: Virtual, Space, BPR, HR, Change Management, Metrics
  - Hire Director

- **Consultants time:** 1+ days a week for 6 months
Methodology

- **Phase III: Oversight**
  - Guidance, supervision, avoid pitfalls, keep project moving
  - Consultant time—2 days per month for a year

- **Phase IV: Continuous Improvement**
  - Keeping up with students (social networking, mobile devices, etc.)
  - Year 1 Review
  - How to add services (Parking, H&D, ID Cards)
  - Improving Operations: Imaging and workflow
  - Becoming Paperless
Transformation in Higher Education, LLC

Nancy Sinsabaugh
One Broadway, Suite 1400
Cambridge, MA
Tel. 617-475-1602
ns@trhied.com