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THE JOURNAL for ONE STOP EXCELLENCE

JFOSE
JOURNAL FOR ONE STOP EXCELLENCE

VOLUME 1
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MARISOL MARRERO
NEW YORK UNIVERSITY
EXECUTIVE DIRECTOR

NYU CAMPUS

Although it seems like only yesterday, I have had more than two decades of experience in One-Stop services in higher education. As a result, I have gained valuable insights into the critical aspects of onboarding, training, and coaching teams. These concepts are crucial in team engagement, retention, and overall success, as emphasized in relevant literature and industry best practices. As a leader, I understand the importance of these elements and how they contribute to building a successful team that delivers results, regardless of the stage of development of your One-Stop.

Simply put, onboarding sets the stage for a new employee's success. Therefore, it must be done well. Each institution is unique in culture and availability of resources. You may rely heavily on your onboarding experience by utilizing one of a myriad of platforms available. Or do you rely on HR to do the administrative paperwork part of the onboarding process, and then you take over with your department's onboarding process? The likelihood is that a combination of both or you rely on the former. Like many of you, I've experienced trying to do more with less. Less staff, smaller budget, fewer resources overall, but still accountable for maintaining SLAs (service level agreements) and productivity. Sound familiar? It is, therefore, essential to be strategic in ensuring that you invest your time and efforts wisely in building a well-thought-out program. Onboarding correctly ensures that you offer consistent knowledge transfer, enabling employees to feel connected and valued. Creating an electronic employee handbook with the option to print is valuable, allowing employees to search for information quickly from any device. It also allows for timely updates that can be shared with employees instantly. Good onboarding practices ensure new employees become engaged and are valuable team and organization members.

Training and assessment go hand in hand and are imperative, but cross-training is invaluable to enhance service productivity and accuracy. When you cross-train, you eliminate silos. Your team members can assist any student that comes into the office. Students do not have to wait for a specific team member to help them with a transaction because cross-training allows everyone on the team to help. Cross-training also reduces wait time and increases customer satisfaction. Students mostly see just one person to get the assistance they need, eliminating the bounce-around effect. The downside to cross-training, if done incorrectly, is that it can lead to too many generalists and too few subject matter experts. Training topics should be based on your established stakeholder service agreements. Creating a timeline that outlines the schedule of topics and how long each will take is essential. A timeline lets the new team member know what to expect and ensures their manager knows their training stage. When developing any training plan, it is vital to remember that people have different learning styles. Incorporating videos, PowerPoints, articles, and other resources will maximize the retention of information provided. Assessing as you go along allows you to evaluate the effectiveness of the material and will enable you to pivot if the individual is struggling. Having readily available training materials will allow you to provide consistent training to new hires and is also great for refresher training for your existing team.

Coaching is an opportunity to enhance leadership development for your existing team and a way for new team members to gain a sense of belonging as they learn about the institutional culture. The literature indicates that a sense of belonging can positively impact an employee's well-being, feeling of value, and higher job satisfaction. Coaching, whether you do a buddy system for a few months or a year with a senior peer, allows both parties to engage and grow in their professional development. It is a cost-effective way to provide a valuable mentoring and coaching experience. From the managerial perspective, providing the mentor with an outline/checklist of expectations allows the manager to check in occasionally to ensure both the mentor and mentee have a productive and worthwhile experience.

In closing, it is essential to remember that onboarding, training, assessment, and coaching are integral parts of the success of your office. It should be a manageable process, not an ad hoc one, where you scramble to do your best when you get a new team member and hope it works. You may be asking yourself, where will I get the time to do all of what was discussed? My response is, how could you not? These are long-term investments in the employee, your team, and your department. Developing these processes should not be considered a challenge or obstacle but an opportunity. It is an opportunity to establish clear and consistent messaging regarding day-to-day operations, policies and procedures, team building, and professional development. Investing time and resources in these areas will result in a high-yield return on your investment with higher employee engagement and satisfaction, resulting in higher retention and increased productivity.

NEW YORK UNIVERSITY

Marisol Marrero
Executive Director of NYU
One Stop Services

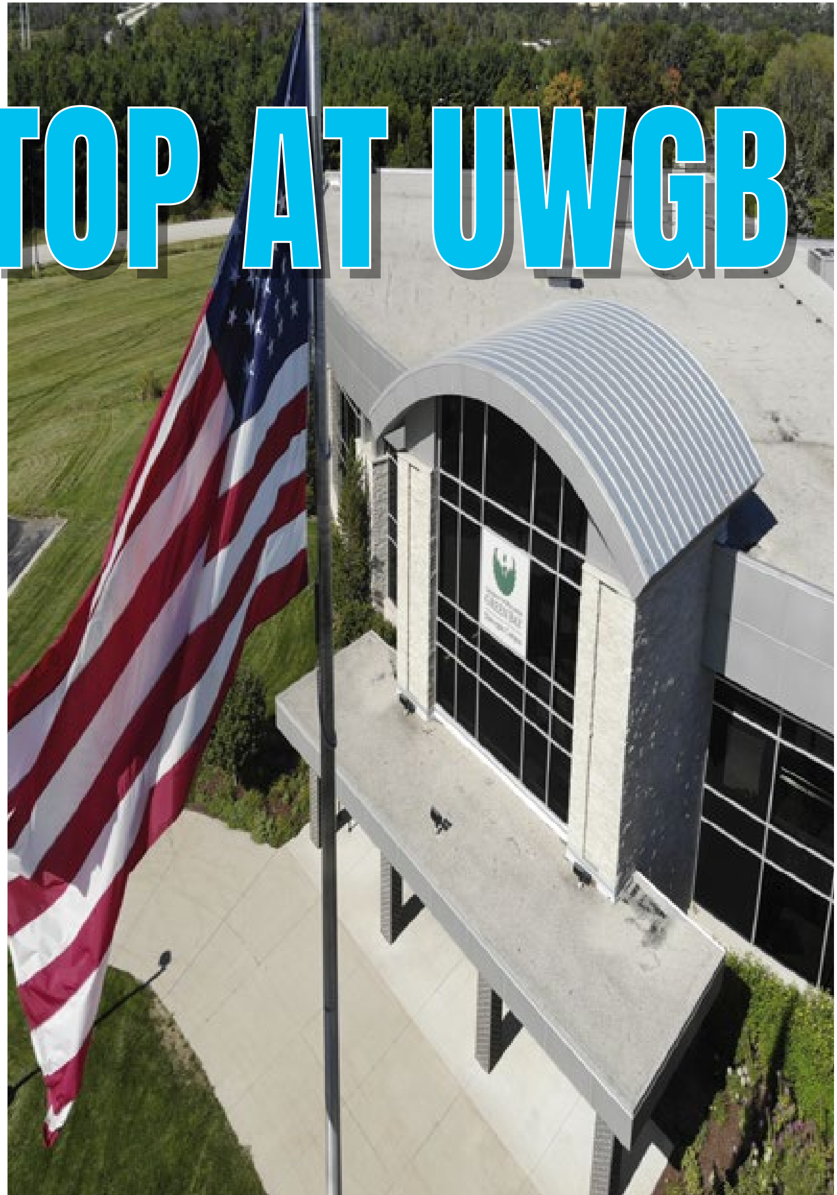
ONE STOP AT UWGB

SAMUEL ROBINSON

UNIVERSITY OF WISCONSIN GREEN BAY

STUDENT SERVICES CENTER MANAGER

I have had a long journey. I am in my 35th year in Higher Ed and I have done several different things. I started out as a departmental admin, and I spent a long time working in admissions. I worked at a school of music, so I did a lot of recruiting, I coordinated all the auditions for them, and that is where I spent most of my time. Then I went from admissions to an orientation office, where we also coordinated first-year student and family programs. I spent about five years doing that. All that work was at the University of Michigan.



UWBG CAMPUS

Samuel Robinson
University of Wisconsin Green Bay
Student Services Manager

opened for me to move down to Georgia at Kennesaw State University where I worked for about 16 years in their College of the Arts. Initially, it was an admissions-related position where I built all the recruiting and admissions processes and then slowly transitioned into a student success position. The last five or six years my primary responsibility was student success. I helped them build the first professional advising office and set up a peer advising program. It was more student-success focused even though we were still doing admissions work. That all ran out during the pandemic and there were some administrative changes, which is why I ended up here in Green Bay.

Wisconsin, Green Bay is an interesting place. It is an access institution that serves northeast Wisconsin. It is in Green Bay, but we have four locations, so it is one university with four locations. We have a location in Sheboygan, a location in Manitowoc, and a Marinette location, as well the location in Green Bay. It serves just over 10,000 students, so it is still a relatively small place. We are a young but nimble and growing institution, which is great. We are very committed to the community we live in. We are an eco-university, so there is a strong sustainability focus here. As an access institution we are really committed to providing educational opportunities for anyone who wants it. That is really our central mission.

We have a lot of service programs; education is a big program. We have a growing engineering population, a lot of business students because Green Bay is a strong and vibrant economic hub. I have been here for about seven months, so I am still learning what most of the programs are. One of the things I really love about our students is they have multiple interests. You see a lot of students with a primary major, but then they might have two or three different minors so they are combining different strengths and interests to build a strong portfolio across their four years. That is my impression of what the student population is like.

University of Wisconsin Green Bay

WHY UWGB IMPLEMENTED ONE STOP

JFOSE: Your institution has a one-stop model, is that correct?

Sam: We do. We call it the Green Bay One-Stop Shop, although we are in the process of choosing a new name, so we are rebranding this year. That is one of the things I was asked to do. We are housed specifically in Enrollment Services, and we support the office of Financial Aid, the Admissions Office, the Registrar's Office, and Academic Advising. To some extent we also support student billing, although that is in a different division. Due to our connection with Financial Aid, we work very closely with student billing.

JFOSE: Do you also work with student housing or parking or cafeteria privileges, anything like that?
Sam: We do not directly, but because of the work that we do, we are the first place that most families and students come with questions. We do a lot of referrals to those areas and because of that we have a fair amount of knowledge about those processes, but we do not support those offices directly.

JFOSE: How long would you say that your one-stop model has been in place?

Sam: It certainly predates the pandemic, at least six to eight years, but it might be longer than that. I know that it was started out of a desire to create a more holistic experience for the students, and we heard very strongly from students and families that they did not want to deal with the silos between the different offices, particularly in enrollment services. They just wanted one place to go where they could ask a question and get their situation handled. That has really been our mission and will continue to be our mission going forward even through this rebranding: to make sure that we are breaking down those silos so that we are eliminating barriers for students to enrollment; that they are having the closest thing that they can to a seamless enrollment experience from point of interest through their graduation.

JFOSE: Can I veer off for a moment and ask you a quick question about technology? With different institutions and because the one-stop team is acting as the customer service arm or the front desk for a lot of these major departments, they will often share systems. For smaller one-stop institutions, maybe just starting to get their model up to date, can you share what systems you use to do your job?

CAMPGREEN BAY CAMPUSUS AERIAL VIEW

Sam: This has been something I have been looking into during my short time here because it has grown as the work has grown. It is not as seamless as it needs to be for the kind of work that we do. We rely primarily on [Microsoft] Teams. That is where we keep our process documentation and is our primary mode of communication across the team. One of the challenges we have is that we are geographically spread out across our four locations. We have a GBOSS team member at each of the locations. We have one each in Sheboygan, Manitowoc, and Marinette. Then we have three on the Green Bay campus because that is where most of the student population is located. That makes communication a challenge because those people are in different places. We spend a lot of time in Microsoft Teams, constantly chatting with each other throughout the day, asking questions, problem solving. If an institution is thinking about starting a one-stop like this, recognize that it is not uncommon for institutions to have multiple locations anymore with mergers. That certainly was the situation in Georgia where we had multiple campuses there. I would encourage institutions to think very carefully about how you are organizing the information that you must access, the policies and processes that you need.

JFOSE: I think we always are. Being a former director of student services and one-stop myself, I was always looking for best practices. That is why there are organizations and conferences that exist that do a great job being able to share that information. Hopefully JFOSE will also be a great resource for individuals and institutions. Regarding technology, do you use queuing software, and do you have a CRM?

Sam: Yes. The CRM that we have is Salesforce. That is what our admissions office primarily uses, and we use it by extension because of our connection and support of the admissions office. We are dipping our toes into a chatbot. I have a couple of team members doing research about building a bot. We have a library live chat right now. It does not get a heavy traffic and it is just another task that a team member must monitor every day, so if we could move to a chatbot that answered some of those most frequently asked questions and pulled information off the website, that could really serve our students better. We have a high nontraditional population and a population that works. We also have an online population through our online programs and a big dual-enrollment program here as well. So, one limitation is that those students do not always have access to a phone or a chat during our normal business hours. Our office does not have evening or extended hours. In that sense, a chatbot would really help us provide better service to our students. That is one of the technology areas we are looking into.

JFOSE: One last question on technology, I know with my previous institution our system of record was Banner. Do you guys use a system of record?

Sam: We are a Peoplesoft school. I should also mention, thinking about technology, we are also in EAB. We have Navigate through our advising office. That is our primary advising support for students.

MANITOWOC CAMPUS

MARINETTE CAMPUS

BENEFITS OF A ONE STOP MODEL AT UWGB

JFOSE: Let us talk about the benefits and things that an emerging one-stop team might want to know about the one-stop model. What do you think are some of the benefits associated with a one-stop model in your experience?

Sam: One of the reasons I was really attracted to this job is that I am a strong believer in holistic student support and creating connections for students. I think that the one-stop is a unique structure to be able to do that. Also, because we are an access institution, we are very committed to eliminating barriers. One of the wonderful things I found in the work that we do is that the leadership in our division specifically, but across the institution, is interested in finding those places where students encounter barriers, and then looking to us to advocate on behalf of the student to change that. I think one-stops are in a unique position to be able to do that. You are at the front of the student experience. You are dealing with students every day. You hear their frustrations, you hear their joys, their successes, and being able to communicate that out to the folks who might see it from their narrow perspective, but do not have that broad perspective that we have in the one-stop. We can see as students are moving through their lifespan, where are the rubs? To me, that is the biggest strength of a one-stop. The other thing I have talked to my team a lot about since I have been here is to put ourselves in the position of being teachers. We gain so much knowledge about so many different aspects of the university, we are in a unique position to help students learn how to navigate that. That is another strength of the one-stop model. We can use our knowledge to help students learn how to be better students.

AREAS OF CAUTION

JFOSE: With the experiences, there are opportunities as well. I know from my institution, siloing was a real challenge for internal communication. You mentioned it earlier as well. What are some of the challenges or areas of opportunity that you see when either starting the one-stop model or continuing through that life cycle of having a one-stop model?

Sam: Siloing. I think any big institution has silos and you think about what should be happening as student services evolves. Students do not care. That sort of departmental division does not mean anything to them. They have a problem. They want to get it solved. I think if you are just starting out, it seems to me that one of the most important things is to try to find ways to break down those barriers, to break down those silos. I am in an envious position because I think all that work has been done here, at least within our division. This is the first place that I have worked where those kinds of silos and barriers have not been a major obstacle. At most other places where I have worked, that has been more of a challenge. Thinking consciously about how you are going to do that, getting buy-in and commitment from senior leadership in those areas to fundamentally change the culture, which you need to do in some places. It is about building relationships and building trust and respect from your colleagues. If you are starting out, that is one of the first things you need to do. The challenges that I have encountered—or that you frame as opportunities—I am spending a lot of time thinking about something related right now. My team is working in entry-level positions. There is not an opportunity to promote within the team. So, what happens is they gain this knowledge, and they start finding a connection and a passion to some other area. The only way for them to make more money is to move on. How do you deal with the knowledge transfer in high turnover environment? One of the things I wish, again, that we had been better able to anticipate was how to capture that knowledge and then train people coming into a high turnover area. I am trying to build a training program here and to think about how we capture and document that institutional knowledge. Those kinds of resources are, if you are starting out, something you must anticipate if you do not have the ability to promote.

JFOSE: Can I stay on this topic for just a second? This is very important that we have this conversation. There are a couple of schools of thought out there that are of a mindset where we want to develop a lot of internal rungs within the one-stop team to help to be able to promote and to give additional opportunity. Then there are others that say, "we look at this as an emerging position people can start in, gain a lot of knowledge, and springboard from there. We do not want to stop an individual from growing and achieving their dreams." What is your team's thought process for this in terms of succession planning or development of those individuals as they are right now?

Sam: That is one of the things I have been working on over the seven or so months that I have been here. I want to create the sense that the team is composed of student services professionals with a level of expertise that is valuable to the institution. We are not a call center. I get upset in meetings when people refer to us in that way. The work we do is just as valid as any other student services office. It is just different. Part of it is creating opportunities for the team. One of the things that I heard clearly from my team is that they did not feel like they could ever get away from their desk. That was the expectation. I want them to have the opportunity to step away and do a special project or learn about something if they have a passion in one area. I have a team member who is very interested in financial aid. So, creating opportunities for her to do things like update our documentation on financial aid processes is important, to look for those kinds of opportunities. I do not ever want to stand in the way of one of my team members moving on to that next opportunity. What I would like to see is that they stay within the institution, so we are not losing that knowledge completely. That is another reason to make connections with other offices, so that we know when opportunities present themselves, team members have an inside road to that. Maybe we are a training ground to keep great staff in the institution who move the institution forward in interesting ways.

JFOSE: I want to continue this topic because this is such a passion for me. Communication with the other departments is paramount and it is one of those things that expectations are sometimes drawn about what a one-stop model should encompass and what it should not encompass. Within my previous institution, one of the things that I did was create a baseline level of proficiency that my members of the one-stop team are expected to be at. They are not the experts, but they are going to be proficient at about 80% of the knowledge base that is out there. Whereas the housed department that does the processing and has that vast amount of knowledge are the experts. We are the experts when it comes to something like customer service and that should be expected. We are proficient and for those that do have the additional time that we can work into their schedule to take on a level of expertise of something that they would like to continue to pursue, I think that is a wise investment, especially as it relates to cross training and you want to have this person stay within the institution.

Sam: Absolutely. I just wrote that down. That is an interesting way to differentiate between those two things. One of the ideas that came out of what I saw on the chat for ISSP is that a lot of one-stops have service agreements with the offices they work with that define that 80% that we are going to be proficiently responsible for and here is the 20% we are going to refer. One of my goals for this first year is to start building some of those service-level agreements so that we are very clear with our offices. This is the value that we provide to you, but we are going to hold you accountable for other things. We suffer from a lack of clarity about those things and so there is a sense—at times—that we are a dumping ground for administrative processes that other offices do not want to do or that they do not feel are as valuable for their full-time staff. Bringing clarity about these different things is important.

THE FUTURE OF ONESTOP AT WUGB

JFOSE: What is next on the horizon for you and your team? What are some of the things that are coming up within the next year or even two years that you are looking to do with the entire team?

Sam: We have two major goals through this rebranding process. The pandemic changed the kind of work that we do, and the focus of the work and it became much more transactional. It was really focused on solving the problem the student has and then moving on to the next one. So, the biggest thing that we are trying to do is become more relational and being more proactive, let us figure out where the problems are going to be and get ahead of those. For example, we have a significant population of non-degree students. Some are what we call senior auditors in the University of Wisconsin system. Someone who is 65 or older can come and take class for free. We have a population of students who are doing that. We also have a significant group of students who are enrolled at other institutions but come to WGB to take a class; either because it is not offered at their home institution or maybe they are trying to get ahead during the summer or during our January term. Those students never had an academic advisor assigned to them. My team is taking them on as registration advisors to help provide better service to those students, to ensure they have a good experience, to make sure that they can enroll their classes in a seamless way. That is a new role for us: to have a set of students that are assigned to an individual member of the team as an advising pool. That is one of the big things we are trying to accomplish. The next thing is looking at how we are keeping all the knowledge for the team. Where are processes and policies stored? How are they organized? This is mundane, but we need an Operations manual. We have never had one. That is the other thing I think that is going to fundamentally change our work. When we do have that Operations manual, all those things that we are talking about being—knowledgeable, proficient, and supportive—we have one place for them to go. Right now, we do not have that.

JFOSE: Let me comment on both of those things for a moment. First, I love what you said about relational versus transactional. I hear that from a lot from institutions and their directors of student services. When you have the number of students that you have, do you have support from student staff as well as the members of the one-stop team or do the one-stop individuals handle it all?

Sam: Right now, it is just the team. There are seven of us, including me, in our team. We are looking to hire some student assistants. We have never had one before, but that would allow us to shuffle some of the administrative things that we do to a student and that frees up capacity for the professional staff to devote themselves to the relational things we want them to do. It is a small team for what we do.

JFOSE: If you have 10,000 students between your locations, you are looking at approximately 1,250 or so on average per individual.

Sam: We tend not to try to think in terms of that relationship. Again, we are there for any student that needs us. That is our mindset, especially in an access institution. But the numbers can be daunting, and we are not unique in that. I was just talking to our financial aid office, and they really have four or five full-time staff to process everything for all their students. One of the advisors was saying one of the lists of students that she must pay attention to has 2,000 names on it. And that is just one of the lists, so we are not unique to that. My team feels the crunch of that.

JFOSE: It has been a pleasure to speak with you. This has been a very enlightening conversation, and I will be very curious to see how you start to move the transactional piece. There is one final question I want to ask you about the operating procedural manual you were talking about. With the development of an SOP, are you looking for something that is physical that will remain in the office or are you looking for something that will be housed on a server?

Sam: I go back and forth about that because in my career there have been two major things that have happened that disrupted the work. There was the Y2K stuff way back and we all did planning in preparation for an Armageddon that never really arrived. But it got the conversation moving about having backup plans and what happens in the case of an emergency. The pandemic also fundamentally changed everything else as we move to more remote technology. So much of our work can be done remotely now. That raises the question of what the best way is to do it. I feel like you must have a balance of both. At least for our institution, because we are spread out geographically, we must have electronic resources. That is the only way to disseminate the information. If we ever had to shift and work from home quickly, we need to access that stuff. On the other hand, we need something physical. What happens if someone is substituting in? We have people who come and cover our phones when we have meetings and things like that. So, you need something physical for people to refer to. I have not arrived at a final solution, but I think it is going to be a balance of both.

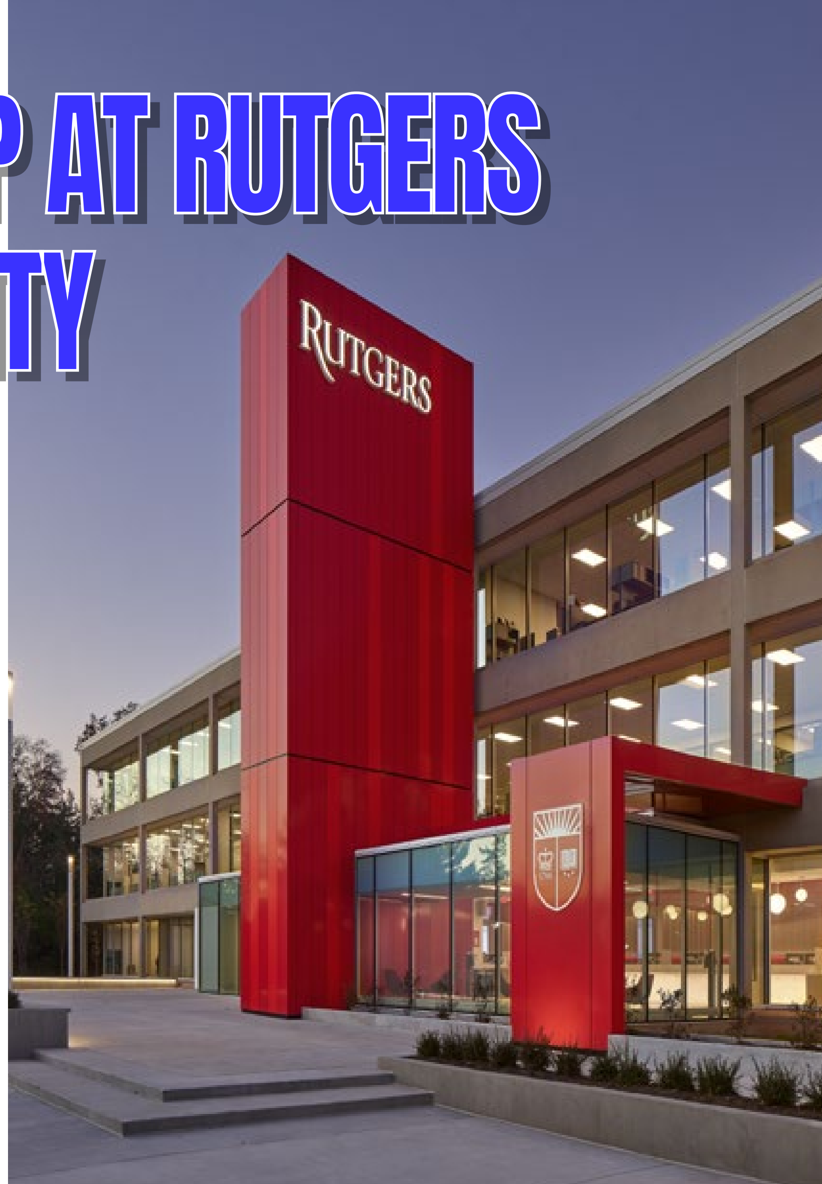
JFOSE: Do you have a set approach to the way in which you onboard new staff?

Sam: I have hired two new staff in the past six months, and I have done it differently each time. The other challenge is that we did not have a training plan. That is one of the things we are starting to build. It depends for us. If the new staff member joins our Green Bay location, there are 2 GBOSS staff members already in place who can do a lot of the training there. If it is one of the other locations, that is the only person there that does that work and I am not physically located there. The way that I have been doing it is to think holistically about what the work is that they are doing now and focusing on that. Depending on when the team member joins, what are they learning first? Then it is a matter of connecting them with the people on the team who are experts in that area providing them with as much information as they can. So, we started building a training manual and then scheduling that out so that you bring that person online. We do not have the luxury of parking that person away from the desk and having them do that work on their own. They must wade into the weeds from the beginning. There is a beauty to that because you learn quickly. But there is also frustration because you cannot learn quickly enough.

JFOSE: That provides some insight into where you are currently and what you are looking to do moving forward. I do think that there is an advantage to having—as you call it, "in the weeds model"—where you have someone learning with the team and experiencing those live scenarios as they continue to go through that process. I also think there is advantage to having a classroom and a set training where there is a learning process that one goes through to better understand certain aspects of the job. There is probably going to be some debate on what might work better and what resources one can provide as part of that process, especially when you are working with a small number of members of the One-Stop team involved in a variety of your different locations.

ONE STOP AT RUTGERS UNIVERSITY

JAY STEFANELLI, PH.D.
RUTGERS UNIVERSITY
ONE STOP SERVICES



ONE STOP STUDENT SERVICES CENTER

I started my career at Bloomfield College, which is now Bloomfield College at Montclair State University in New Jersey and I got into that role, which was an admissions role, working specifically with transfer and adult admissions. It was mostly helping students who were looking to come back and complete their degree. After working at Bloomfield College for about two years, I moved over to Montclair State where I was an Assistant Director for Enrollment Services and I worked exclusively within the graduate school, working with master's students primarily. That role was about making sure that they were taken care of in terms of all their enrollment services, streamlining anything that they would need from the time that they were admitted to the time that they were enrolled and introduced to their faculty. I did that for about five years at Montclair and made my way over to Rutgers' School of Communication and Information where I had a smaller population of students but a larger range of responsibilities. I was there for about six and a half years before I saw the position at the one-stop at Rutgers, which at the time was just an idea. It was an assistant director position, and I refused the job from two different colleagues who brought it to my attention independent of one another. Twice I said, "I don't think this is right for me." You know how things go, I think once you get that third person to come to you and say "hey, have you seen this?", maybe you take it more seriously. After having that third conversation, I applied and was the last applicant to do so. I like to think of myself as the Indiana Jones of this search because I got right through the door as it was closing and grabbed my hat and the rest, as they say, is history. I have been with the one-stop at Rutgers since October of 2018, starting as the assistant director. After some transitions within the department, I was made director in July of 2020, and I enjoyed every bit of it. It is absolutely a labor of love. Particularly at my alma mater where I earned all my degrees. I came into the role with a good understanding of what some of the challenges were at Rutgers because of my experience as a student and as a staff member for six and a half years. I think more importantly was my experience working with graduate students and having to understand each step of the journey from start to finish and how any little obstacle can impact enrollment and student success outcomes.

Jay Stefanelli, Ph.D.
Rutgers University
Director of One Stop Student Services Center

RUTGERS
NEW BRUNSWICK

BACKGROUND ON RUTGERS UNIVERISTY

JFOSE: Thank you for sharing that. What can you tell us about Rutgers University?

Jay: Sure. Rutgers University, New Brunswick, which is where I'm located, is the flagship public institution for the state of New Jersey. It is a member of the Big 10 Academic Alliance. We are members of the AAU, 257 years old, which means that Rutgers predates the founding of United States as the eighth oldest institution of higher education in the US. So, there is a lot of history here. There is a lot of opportunity here for our students. We have all the resources of what it is to be a big public and all the history of what it means to be a very small private which puts us really in the same grouping historically as your Princeton and your UPENNs, which sounds crazy, but it is true, particularly because we are a large state institution. I emphasize the word large deliberately because Rutgers is described as a big place. I think when people describe it that way there are two meanings that are happening simultaneously. The first is that Rutgers is physically a large place.. The New Brunswick campus has about 50,000 students across five regional campuses. But I also think that people will refer to it as large because Rutgers is a very bureaucratic place. There is a lot of red tape. One student quote, and this is real feedback that I got from a student, is these three words: "Rutgers is impossible." Sometimes it is. But how do I describe Rutgers? I think Rutgers is a wonderful place with lots of opportunity. Unfortunately, I think it takes a certain type of student with a certain amount of resilience to work their way through the process. As somebody who has done that now three times, I can understand where they are coming from and that is one of the reasons why I take such great joy and pride in what it is that I do. I am trying to make this large, difficult place to navigate into a much smaller and much easier place to manage, to help students get around and figure out what it is that you must do so they can focus on the important stuff. That's why I am thrilled to be talking about what it is that we have been able to do at Rutgers.


RUTEGERS U B.E.S.T. BUILDING FRONT VIEW


WILLIAM THE SILENT ON MAIN CAMPUS


SCHOOL OF NURSING & SCIENCE BUILDING

RUTEGERS U CAMPUS AERIAL VIEW


RUTGERS UNIVERSITY'S B.E.S.T. HALL COURTYARD

BENEFITS OF THE ONE STOP MODEL AT RUTGERS UNIVERSITY

JFOSE: That leads to an analogy that I am familiar with, which is that when you are trying to steer a large ship, you cannot just stop on a dime. You must take effort to gradually change course. That leads us to the formation of the one-stop at Rutgers. Why did Rutgers decide to do a one-stop? What were the benefits they saw and what is it they were thinking about when they initiated this process?

Jay: I think they were thinking about the way that students felt about the experience of Rutgers. For the longest time, I think this was a defense mechanism then, how people felt. I think there was this sentiment that if you can survive at Rutgers, you can survive anywhere. I used to ask myself if that is something we should be taking such pride in. Is that the lesson that we want our students to learn, or should they just be able to get through the financial aid process, as an example, and then focus on their academics? Teaching those sort of life lessons is valuable, but maybe we should not make the process so difficult that you now are this incredibly resilient person, where you can effectively navigate lots of different challenges in your life. I bristle at that quite a bit. To come back to your question, which was "what are some of the reasons?" I think it was very clear that there was an issue with the student experience based on some of the feedback we receivedwhen we started to do some of our focus groups. That feedback was that if I come to the Financial Aid, Registrar, or Student Accounting office, and I am a student, I want one of two things: I want you to help me or I want you to be nice. It is a false dilemma; clearly both are possible. So, we found very early on that there was a cultural issue we had to address, but there were also a lot of policy and system issues that we had to address. What can I say? Some of the benefits we were trying to achieve included a single point of contact. From the cross-trained of individuals who could work through these systems in an integrated fashion to truly understand the root of a problem and its downstream manifestations. If a student cannot register, that is usually not the issue. That is a secondary problem that is caused by something else that is more concerning in all this. I think they wanted to address some of the confusion that students have about who to seek support from and how. There was an issue around efficiency: how do we do this and how do we do this work better than we have been doing it previously? I really want to emphasize that culture piece because I think it is critical to what it is that the university sought out to achieve: to improve the student experience. To do both of those two things that I mentioned earlier—to both help someone and to do it nicely. I like to think that it is a low bar to set, but to your point when you are steering a large ship, sometimes it is not as easy as it should be. We have certainly been able to do that in the short time that we have been in existence.

JFOSE: How long has the One-Stop at Rutgers been in service?

Jay: We took on 100% of the frontline duty starting January of 2020, but we had a large lead time because my supervisor, Deepa Bhalla, the original director who is now associate vice chancellor, started in January of 2018 and I started in October of 2018. So, it was roughly ten months after she started, and we hired our first cohort of student services advisors who are the frontline people in February of 2019. Then the second group, so for a total of 12 frontline people, in August of 2019. We had this wonderful runway that we did not think was wonderful at the time because we were ready to go and do this, but that amount of time really allowed us to think through a lot of things and most of that timeline was situated around the need for training. A lot of it was suited building a physical space and putting ourselves onto the roadmap for technical support. The University had a whole bunch of things that they were implementing at the time. What we were told, initially, was that we needed to have this up and running in 18 months and that kept getting extended. We took on the responsibilities in the existing physical space in January 2020 and opened our physical doors to a brand new facility in August of 2021.

JFOSE: Can you go over the frontline responsibilities? I know with my institution we handled five main disciplines, which were Financial Aid, Military and VA, Bursar, Registrar, and Admissions, in that we were the customer service arm of those specific departments. What do you do at Rutgers or what do your people do on the front line?

Jay: It has evolved. I like to think that we have been given more responsibility over time because we have been doing what we have been handed well enough to be trusted with more. We started with Financial Aid, Student Accounting, and Registrar. Exclusively through web form and email submissions and in-person. At the time our call center was outsourced to a third-party call center. They did an okay job. That was part of the larger transition that we had to make as an institution, consolidating all this for frontline service. Over time, by the time June of '21 rolled around, just before we opened our physical location, we advocated to bring the call center in-house and merge with the call center that already existed at the university and had been in in existence for decades. I remember using it when I was a student. These three entities came together to create what is the one-stop currently where we now handle Registrar, Student Accounting, Financial Aid, Undergraduate Admissions on the phones, a very little bit of Graduate Admissions, and ID cards. By the time 2023 ends, we will likely see somewhere in the ballpark of three quarters of a million in student inquiries, which is just insane, but we have a lot of students at Rutgers who have lots of questions and we do our best to manage it through those intake channels across those areas.

JFOSE: That brings me to related topic about the types of technology you and your teams use. I can tell you from my perspective and multiple directors of one-stops that I have spoken with, that is a big pain point for them because not all those systems have connectivity that you would really like to work with. What types of systems does Rutgers' one-stop use?

Jay: First and foremost, we are working with nearly two dozen disparate systems from our homegrown SIS to COD to NSLDS to our financial aid platforms. We are checking these two dozen systems to try to get a full picture of what it is that the student is trying to explain to us. One of the first things that we did as a one-stop was institute a virtual one-stop to consolidate some of those different systems from the student perspective into a single platform. So, we have this homegrown website called MyRutgers which is effectively a dashboard for lots of different things like your email, and your financial aid, and your term bill, and what you are registered for, and your degree navigator in terms of trying to know where you are in your degree progress. That was the first step in getting all this information together for our students. We did something similar for our staff, which is to integrate something into what we call the one-stop screens so that we can have a broader picture of what a student looks like across a bunch of different areas without having to navigate to all these different platforms. We still have many other systems that we must look at, but the one-stop screens are a powerful place to start any investigation.

What I would say is the most powerful, and one of the most beneficial pieces of technology that we have been able to implement, is Salesforce case management. In my previous role at the School of Communication Information, I implemented Salesforce to effectively capture the student experience for graduate students, particularly master's students from the moment they indicated any sort of interest all the way through to graduation. I was thankful I was able to be part of that project and to drive it because it gave me a better sense of how to do this with all the support of our IT team and consultants once I got to one-stop role. We built a robust platform where we were able to adapt case management to do what we needed to do in terms of capturing data, capturing the student experience, communicating effectively, having a transparency between offices and between agents who are working the front lines so you can see exactly where somebody is, what type of questions they have all the way through to predicting potentially what the next issue might be for that particular student. That has been the most important piece of technology that we have been able to muster up in terms of positive outcomes. We launched the implementation project in January of 2020, and we went live with the platform on the first day of class in the fall of 2020. It does everything that we need it to do in terms of transparency, accountability, and communication. We love it.

JFOSE: That's amazing. I love case management, regardless of what CRM we use. Primarily because it allows us to access those nodes and get those across a variety of different platforms, regardless of what disciplines a one-stop team member might be managing. The one-stop teams manage a variety of disciplines, which we already discussed. I am curious if you have the technology for something like queuing, whether it is virtual queuing or whether it is in-person queuing. Do you have software that handles that?

Jay: We do, and it is also handled through Salesforce. Every one of our intake channels leads to Salesforce. Whether you submit an inquiry online, whether you call us on the phone, or whether you come to us in-person and swipe your ID card and get into the queue that way, all roads lead back to Salesforce. We have a Salesforce visual force page, and it all connects on that back end. Then we work the case just as we would any other case. The beauty of having it integrated that way and having it all lead to one system is that it fosters better transparency across cases and across student issues. But there is that accountability piece that I mentioned earlier. So, you can see who did what. You can look at it in terms of training if anything has gone wrong. You can look at it in terms of ways to reward or acknowledge people for their hard work because we are also tracking all our student metrics in terms of the student experience. So, every person who comes through our one-stop, once we close a case and we think that issue has been resolved, they get a survey that asks them how we are performing. All that feeds into Salesforce so we can look at who reached out, what we communicated to them, what they communicated back to us, and then ultimately what their experience was. We look at this information a lot. The other beautiful part about Salesforce is that not only does it track and collect and house all that information, but it also allows us to run some robust reports and we can sit those onto dashboards. That has been one of the ways that we have been able to grow. It allows us to sing our song and we can sing it in lots of different languages. We can talk about it in terms of volume. We can talk about it in terms of the student experience and their satisfaction levels. We could talk about it in terms of outstanding revenue if we wanted to. How many tuition dollars have we not collected because of this issue? Being able to speak and sing in those different languages has been critical because we went from a team of two in October of 2018 and we are now a team of 29 in August of 2023. It is incredibly rapid growth but with that growth of staff size has been growth in terms of responsibility as well.

AREAS OF CAUTION

JFOSE: Absolutely. We've already discussed some of the benefits that came from implementing a one-stop such as the responses from your students and that wonderful lived student experience improvement. Let us move to the other side of the equation. If you were giving advice to a new school or a school that was working to start a one-stop model, what advice would you give them to avoid potholes or mistakes?

Jay: I have a lot of advice to give. Having lived through it, you can look backwards and say this is what I would do differently and thankfully we do not have a lot of that. First and foremost, you must be very mindful about your resources in terms of your staffing, your location, your virtual resources, what technology you are going to have, and what type of ongoing support you are going to have for that technology. The idea of instituting something and having it work on day one is great, but what if you need to make changes down the line? What type of support do you have to do that? So that is the grand scheme of what it is that you should be looking at. If you're thinking about opening a one-stop or if it has already been decided that you are going to be opening a one-stop, I think you also need to gauge how much commitment there is at the campus level. Commitment from leadership particularly. If you are left as a director to fend for yourself and gain the buy-in and support of your colleagues whose resources you may end up using, I do not think you are going to be very successful. I do think that this needs to be top down and bottom up in the sense that university leadership must be invested in the one-stop coming to fruition with a shared vision across all these platforms. Secondly, you do need somebody who is at the wheel to make sure that these relationships are being developed so that you can gain the buy-in and the trust. You must be very aware of the culture at your institution, and you need to make sure that you are communicating with your partners and your general greater campus partners about what the one-stop is going to do, what is it not going to do, and who it is going to impact and how. If you are not doing that, it is to your detriment.

JFOSE: I want to ask a question specific to that point. When it relates to other departments, do you have a formal agreement with them or an informal agreement with them? Some institutions will implement a fully formed formal agreement. There is also the feeling that potentially that could impact the relationship between that department and yours.

Jay: What do you mean by how it will impact the relationship?

JFOSE: The concern that I have heard from some institutions that may not want to do a fully formal agreement is that they are concerned that it might impact being able to get more on time communication, able to be part of certain conversations, siloing issues.

Jay: I can certainly understand that as a sentiment. In my experience, I have found that good fences make good neighbors. We are talking about Robert Frost's poem, "Mending Wall," which is to suggest that if you and your partner come together and you build that clear boundary between where you start and they begin and where you end and they begin, there is magic there. You are working collaboratively to address shared concerns about when to pass the baton off to you as my teammate as opposed to leading up to this ambiguous "we're not quite sure." I think more detail is better because setting the expectations for yourselves is a lot easier and it is something that we have done at Rutgers in terms of developing service level agreements. We call them "standards of practice" because "service level agreements" just sound so finite and definitive and a little bit harsh. We want to make sure that our partners feel invested in this and so we call them standards of practice. It is everything from who does what, and what the timeline is for that service. Most of the time if we do not meet the timeline, like the end of August and early September when we are all swamped, then we never come back to the table and say, "you guys didn't do this." It is more like, "We are working on it. We know this is the expectation. This is where we are, and we want to communicate that out to you." It is about getting together to define these boundaries in service of the students. If you find that there is a disconnect or confusion around who should be doing what and what timeframe, then you can go back to the standards of practice and say, "This is what we agreed to. Do we need to change this? And if so, what should we change to?" Our relationship is that it must be a two-way street. Building relationships is important, but establishing boundaries is an important part of any relationship as well.

JFOSE: Thank you. This is a hot button for many institutions I have been interviewing and it just seems as though siloing specifically is one of those sticking points that can sometimes cause friction, especially when you're talking about measures of control. From time to time there is a disconnect or a miscommunication where siloing starts to happen as a result and the meetings need to come in to be able to address what is not working. How often do you think that should be revisited? Is it something that you feel should be revisited on a scheduled basis or just when issues pop up?

Jay: To say one or the other would be to the detriment of any institution because you must feel through your personal experience. We informally look at this once a month. I run a meeting, we call it the one-stop partner meeting, and we meet the first Thursday of every month. It has been wildly successful. Originally the meetings were conceived to conceptualize the one-stop and work through how we were doing, and it has come to be more of a meeting of the minds to talk through ongoing issues and to recap a month and look at the statistics, address some of the concerns that we have around satisfaction or turnaround time or escalations. There is that informal way of looking at what it is that we do and how we do it. Then we do look at it annually in more detail to ask, "has this worked for the last year and do we need to change this and implement it as a new policy?" It is more of a guiding document than a contract in any way. That is why we shy away from service-level agreement as the specific term, which for all intents and purposes, is what our standards of practice are. It gives us a little bit more wiggle room in terms of how we operate.

RUTEGER UNIVERSITY AERIAL VIEW

FUTURE OF ONE STOP AT RUTGERS UNIVERSITY

ONE STOP STUDENT SERVICES INTERIOR

JFOSE: What is coming up on the horizon for you and your one-stop team?

Jay: For the longest time we have been in such a growth stage that we were really looking forward to getting to a maintenance stage. I cannot say we are there. We recently instituted a new financial aid platform and that has really eaten up all our time in terms of responding to students. The frontline responsibility has become 110% of our focus because we are troubled at this point in our existence. Shoring that up and working with our university partners to make sure that they are aware of the types of issues that are coming down on a daily or sometimes hourly basis. It is something that we are trying to figure out. That is what I imagine a lot of our time going forward will be, making sure that we are going to get that right. If your systems are not working, it can adversely affect not just people's academic experience but every experience that they would have around finances in any capacity must get that right as an institution. What we also need to do is a little bit of what I said earlier. Looking back and making sure that what we have done and the decisions we have made, not just on an annual basis, but really since our inception in January of 2020 were decisions that we think benefit our students and do not force them to navigate another bureaucratic operation with lots of red tape. We want to make sure that the way we are organized does not prohibit students from seeking the support they need. Also, revisiting and debriefing the first three years and making sure that we have gotten our call center approach right, revisiting our knowledge articles, the way that we communicate through our CRM and quick texts, revisiting training, which we do every time we have a cohort come through, looking at assessment and making sure that we are still measuring the things that we think are important. Also, looking at staffing needs given what is coming down the pike like FAFSA simplification and we are bringing CommonApp on. We need to work with our partners in the ID card offices across campus to make that process smoother for students and for staff. We need to revisit our role in how our website is administered. We currently have effectively two websites that students can visit for all things Financial Aid and Registrar on a separate website for all things related to student accounting. The one-stop clearly was an opportunity for us to integrate across all these areas so that students could go to one place and get an answer, but they are still navigating to two different websites to get that same information. I think there is an opportunity there to consolidate that we want to play a role in. We are not focused on new growth opportunities, but on making sure we are well prepared to do the work that we have already to the best of our ability. To make sure that the students are pleased with the accuracy of the service that we are providing and the timeliness of that service.

JFOSE: Thank you. One final question I want to ask you in relation to your student support. You mentioned earlier that you hired 12 specialists. What additional support do you have? With my previous institution, I had 66 members of my one-stop team between 27 different campus locations, but we also did not have student workers. I do not know if you have a tier-based system or how that system looks. Can you share that with us?

Jay: I am happy to. We have both thankfully. We have full-time employees. We do not have any part-timers and we have a nice group who we call student colleagues. We have very deliberately chosen the word colleague as opposed to worker because we rely on them as we would any colleague. They are our greeters who effectively greet people in person at our physical location, make sure that they are in the right place, help them with the check-in process, triage minor issues, do those sorts of things. Then we have what we call one-stop agents and those are the folks who work at the call center, who answer nearly 100% of the calls that come in right off the bat. Across these two groups they represent about 50 students, many of whom are federal work study, many who are not. It is not a requirement either way. We work with our colleagues in Financial Aid in the federal work study program to make sure that we are assigned an adequate number of students. We still interview them and make sure that they want this job because this is not an easy job, particularly in a call center. It is very different than swiping ID cards at the recreation center. It is just very different, and it takes a lot of training, and it takes a desire to help others and a certain amount of resilience I mentioned earlier. We have both. In terms of our full-time staff, we have about 20 front line student services advisors—all of whom report to a team lead. Those team leads then report to an assistant or an associate director, and then they report to me. Before we had this structure, before I became the director, I was the assistant director, all 12 of those first-line student services advisors reported to me. Right now, the maximum number of folks that anybody has reporting to them outside of our student colleagues is five. That seems to be a pretty good number.

JFOSE: That does bring up one other issue that I know sometimes directors of student services or managers sometimes while facing staffing issues. Often the role of one-stop can be an introductory role into a university. It might have expandability and the ability to grow if there are those opportunities. Then there is also the perspective that this is seen as a launching point into other avenues within the university. Do you have staffing issues? And if so, how do you best deal with that?

Jay: Scott, I think we had staffing issues up until like two months ago, frankly. There is no great formula for staffing at a one-stop. I appreciate that there are professional organizations that try to come up with a formula, but we have not done it all that well, particularly for one-stops or offices of integrated student services. I know there is a Financial Aid model and there is a Registrar model, but none of them speak to the integrated piece to all this. From the moment that we started, when we hired six people to come on and answer questions across these three areas for 50,000 students was not enough. We hired six more and having 12 people answer 50,000 students and 150,000 inquiries a year was not enough. I do not think we have ever really been adequately staffed. I would say we got really close recently because our Financial Aid platform does not work the way that we would like it to work, and it causes a lot of inquiries that should not exist at all. If we had our existing staffing model with a platform that was more developed and more mature, we would be in a good place. We will see how that all works out. As I mentioned earlier, FAFSA simplification is coming down the pike and federal guidance suggests that we should staff up to accommodate the change, so we need to be mindful of that. We handle about 80% of the inquiries for Financial Aid within the one-stop at Rutgers. We escalate about 20% used to be lower, but the challenges with a new platform are far reaching. It is similar across our other areas, but we know that a lot of those questions are going to come through our office, and we need to be adequately prepared and staffed to handle that. So, staffing may be something that we need to address in our next fiscal year. On August 1st, we came onto the Common App, and we recognize that it is going to have an impact on our operations as well and more questions from students about their application and status, which will leave less time for other types of inquiries. We are not done growing at this point. It is something that we need to be mindful of in the future and do our best to measure it as it comes down.

JFOSE: Thank you. I have one other follow up question. Do you feel as though your staff is meant to have transactional relationships with the student or relational relationships with the student? I do not know if your systems allow for designations to be offset to a very specific member of your one-stop team or if it is just whoever comes in will answer their questions.

Jay: Kind of neither and kind of both. We are designed for transactional, but the nature of certain questions needs to be more relational. We have a platform that allows for a little of both things. If you come in, anybody should be able to support you and the way that are we are set up in Salesforce is that we can see even if somebody is out for a day or out on vacation, we can reassign that work to somebody else and they can pick it up and they can do the work. The beauty of our system is that if you start a conversation with somebody, you can maintain that conversation with that person as opposed to bouncing around from person to person and maintain the continuity of conversation and relationship between people. That is important, but I think being able to turn on a dime and get the work done is also incredibly important. What we do not really like is when students come in, and say, "I want to talk to Justin." Then we might have to say, "Justin is not available, or he is doing something else," and so we do our best to support that student in the moment, but there are times where it is different, and this person really does need to talk to Justin, and we will make that connection.

JFOSE: I would like to thank you very much for all your time today and sharing your vision and the vision of Rutgers with us.

ONE STOP RIBBON CUTTING EVENT

ONE STOP AT TEXAS A&M

ERIN PORTER
TEXAS A&M
AGGIE ONE STOP SERVICES

MAIN ENTRANCE AT TAMU

My name is Erin Porter, and I am the director of Aggie One-stop at Texas A&M. After graduating from Texas A&M with my undergraduate, I spent a short career in advertising, marketing, and sales, but then found my way back to the campus in the Financial Aid office in 2004 where I spent 17 years. I did student advising. I oversaw customer service for a period, I oversaw processing for a period, then I left as an associate director who was overseeing a little of both when Aggie One-Stop was formed in 2021. I was asked to move to the Aggie One-Stop to run that office and I have been here ever since.

I oversaw processing for a period, then I left as an associate director who was overseeing a little of both when Aggie One-Stop was formed in 2021. I was asked to move to the Aggie One-Stop to run that office and I have been here ever since.

Texas A&M University is in College Station, Texas, which is right in the middle of Houston, Dallas, and Austin. We are kind of in the middle of that triangle. We were founded in 1876. We were Texas's first public institution of higher education. Our main campus in College Station spans over 5,200 acres. We are currently one of the nation's largest universities, if not the largest. It changes year to year. Our total enrollment is over 75,000 students with around 69,000 enrolled at the College Station campus. We are one of only 3 tier-one universities in the Texas state. And we are one of the first four universities to hold a triple land, sea, and space grant designation. So, a large university, very diverse academic and research institution in terms of our scope and what we excel in.

Erin Porter
Texas A&M
Director of Aggie One-Stop at Texas A&M

TEXAS A&M UNIVERSITY

WHY TEXAS A&M IMPLEMENTED ONE STOP

KYLE FIELD AT TAMU

JFOSE: I heard you earlier talk about the formation of the one-stop. You referred to it as Aggie, is that correct?

Erin: Yes. The Aggie One-Stop. We are the Texas A&M Aggies, though that is not our mascot though. Our mascot is Reveille, or Miss Rev. She is a collie.

JFOSE: What prompted your institution to form a one-stop rather than a more traditional student services model?

Erin: The discussion to form a one-stop has been taking place for easily ten or more years. I can remember it being discussed during my time in the financial aid office. But it really gained traction in 2019-2020. The main goal is to provide holistic advising across all enrollment services and reduce the bounce that students might experience when they do not know which office is the right office to call. They only need to remember to reach out to Aggie One-stop and we can usually assist with whatever questions they have if it pertains to enrollment services. In the past, students would call one office, resolve the issue there, and then must be referred to another office to resolve their issue. One example would be a financial hold for a balance due: they would be informed of the balance from the Bursar, be referred to Financial Aid for options, be sent back to the Bursar to remove the hold, and then be sent to the Registrar for registration questions once they were able to register. We can now assist with that in a single visit or contact to Aggie One Stop. That is the primary reason. With an institution as large as we are, it can be very difficult for students to navigate the complexity in the different offices. It was an effort to make that as simple as possible. We have an unofficial motto here that students do not go to school to learn how to apply for Financial Aid or to learn how to register for classes. They go to school to learn whatever they want to do with the rest of their lives. The rest of it should be easy and should be secondary to them coming and achieving their educational goals. That is what we exist to do: to make that part as simple as possible.

Another premise behind the intent of Aggie One-Stop that we have realized is the benefit of the 360-degree view of the enrollment services processes. How they connect, or in some cases do not connect. We have a unique perspective now to see that and streamline the processing that takes place so that it makes more sense to students. Another goal is to provide consistency in communications, messaging, and branding. A student may receive an email from two different Enrollment Services Offices that are written with very different voices. They have a very different look to them and one thing that our one-stop is actively working on is trying to bring that together to where all the communications look the same, so the student understands the messaging. It needs a consistent voice. We are seeing all those things come to fruition as we enter our second year.

JFOSE: I know within the realm of one-stop as a previous director, I had five main disciplines with which the members of my one-stop team would work: Financial Aid, Military and VA, Bursar, Registrar, and Admissions. We acted as the front counter for those disciplines, allowing our partner teams to do all the processing in the back. With the Aggie One-Stop, what are the key disciplines that you focus on?

Erin: We are the same. We refer to them as our partner offices: Admissions, Scholarships and Financial Aid, Military Education Benefits, which is housed within the Financial Aid office, Student Business Services, which is our Bursar, and then the Office of the Registrar. There are nuances to what our role is in terms of providing customer service and advising for those offices. For example, with the Office of Admissions, we do not have a role in recruiting or any pre-application customer service or advising. If a student is still deciding if Texas A&M is the right school for them, they are still in high school, or they haven't applied yet, Admissions has dedicated staff for those types of questions and those contacts. Once a student has applied and they are in the application process, we take over in terms of the customer service of navigating them through the application process, educating them on deadlines, requested documents, how to view their offer, accept their offer, transition to their new student orientation. That is more of our role on the admissions perspective. With the other offices we do primarily function as the main student point of contact. We have taken that customer service and advising role on behalf of those offices and those offices primarily focus on the processing. They handle some specialized student contact, professional judgment appointments and appeals, for example, in the Financial Aid Office. The Registrar's Office still does appointments for residency determinations, things like that. Otherwise, we are the primary advising arm for those offices.

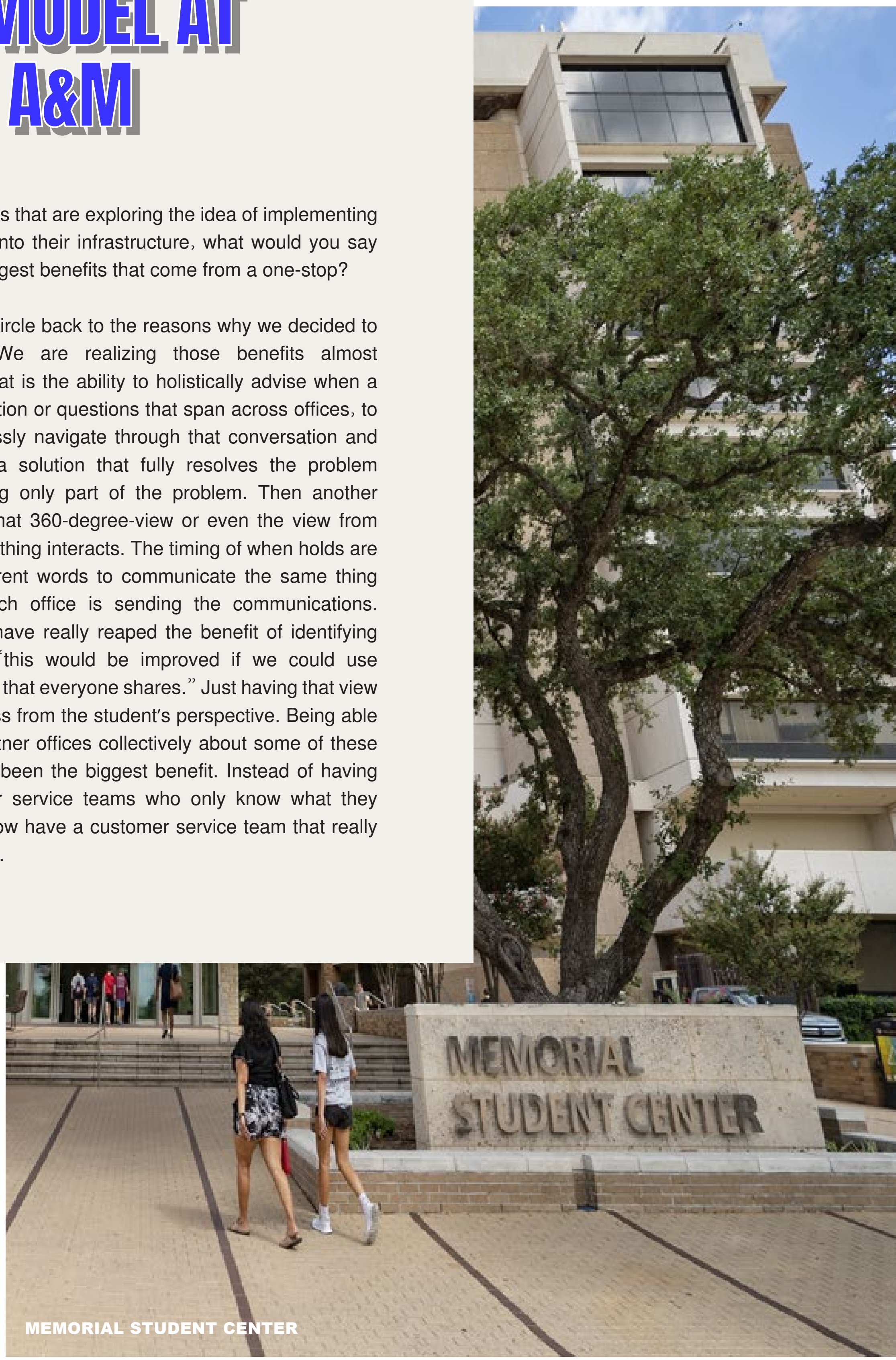
JFOSE: What type of technologies does your team use to track all of this?

Erin: It is a work in progress. We are not where we want to be in terms of the technology that we are using. Currently we use Slate as a pseudo-CRM. We use that for in-person queuing and then that is how we facilitate what we call "tickets" to our partner offices. If there is something that needs to be updated on a student account, something that we need to refer to the partner office, we create a ticket and that is all done out of Slate. For email, we are using a very small ticketing system called JitBit, which is a temporary solution. Not very many people have heard about it, but it is affordable, and it functions out of the box. There is very little configuration, and then we are using Cisco Webex contact center, VoIP phones. What we are missing is the system that integrates all these things. We are very excited that we have approval to implement Salesforce, but we have not ventured down that path yet. That will be kicking off this fall with hopes to be up and running by next fall and integrating all our systems into one place.

BENEFITS OF THE ONE STOP MODEL AT TEXAS A&M

JFOSE: For colleges that are exploring the idea of implementing a one-stop model into their infrastructure, what would you say are some of the biggest benefits that come from a one-stop?

Erin: The benefits circle back to the reasons why we decided to do a one-stop. We are realizing those benefits almost immediately and that is the ability to holistically advise when a student has a situation or questions that span across offices, to be able to seamlessly navigate through that conversation and offer the student a solution that fully resolves the problem instead of resolving only part of the problem. Then another benefit has been that 360-degree-view or even the view from above of how everything interacts. The timing of when holds are placed, using different words to communicate the same thing depending on which office is sending the communications. Those things, we have really reaped the benefit of identifying that and saying, "this would be improved if we could use consistent verbiage that everyone shares." Just having that view of the whole process from the student's perspective. Being able to talk with our partner offices collectively about some of these shared issues has been the biggest benefit. Instead of having individual customer service teams who only know what they specialize in, we now have a customer service team that really sees the full picture.



MEMORIAL STUDENT CENTER

AREAS OF CAUTION

JFOSE: Wonderful. On the flip side, what have been some of those opportunities that you have seen that a One-stop in their infancy should probably be aware of?

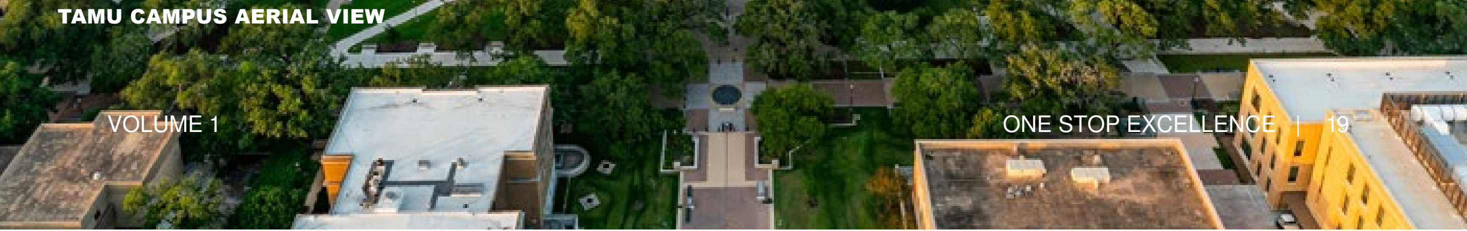
Erin: Opportunities, meaning challenges? Things that I would make sure are discussed during the implementation phase include that decisions will need to be made about how the one-stop will be staffed and there are really two approaches. You can either reassign existing staff from the offices that will be represented and move them into the one-stop without them having much say in the matter, or you can eliminate positions and have people reapply to the one-stop. Those are really the two approaches that we found most schools have used when we were researching our one-stop, and we chose to reassign staff. We felt like that was the gentler approach, as opposed to eliminating somebody from their position and then having them reapply for a job. An aggressive timeline for implementation needs to consider time for turnover and filling those vacancies. It should be expected that with major change you are going to lose some people and so the next thing I would say is a comprehensive change management strategy needs to be in place with adequate time to implement that change. You must focus on not just building the space, launching the technology, having the procedures, all those types of operational decisions complete. Change management brings the staff on board, having everybody understand the shared goals.

Also prepare for initial turnover before you settle into your long-term one-stop team. The other question that was a surprise for us was accounting for faculty and staff in your campus community. Who should they be contacting for questions they have? We realized that our faculty and staff would reach out to the customer service teams in these partner offices when they needed a direct connection to individuals that had access to make things happen. For example, a staff member in an academic department is questioning charges for all the students in their program. We in Aggie One-Stop do not manage tuition assessment. We are limited in our ability to research and solve that problem. So, how do we provide direct contacts for our faculty and staff community to the individuals that they need to talk to so that they are not calling our main line or emailing our main account, which can be very busy at times. They need a more streamlined direct contact. We quickly realized the need for that and had to identify those contact points and work with our partner offices to communicate that out to the community. It was not something that was on our to-do list. The other thing is allowing time to educate the partner offices on the importance of having shared procedures, policies, and approaches to things: for example, turnaround time on working tickets that we create. There needs to be a uniform expectation of how quickly those will be responded to, uniform policies on escalations to your partner offices. Is that a permanent handoff? We have handed it off and now any follow-up to the student needs to come from the partner office. Or is the expectation that it will be handed back to the One-Stop to do the follow-up? Who closes the loop on those? These are things that need to be worked out in advance.

Training is another big thing that needs to be considered. Who is responsible for training? There will naturally be a focus on initial training of staff when forming a one-stop and your partner offices will be heavily involved in that because they are conveying and transferring all that institutional knowledge over to your one-stop. But then who is responsible for that going forward? If it is not the partner office, then how will the one-stop stay informed of changes and be kept up to speed if they are not embedded within that office? Setting expectations and procedures for that training is important. We were initially trained by our partner offices and then some of those offices said did not have the capacity to continue to train new hires at the one stop other offices insisted on providing the training of their content to our new hires. Since, we have settled in a hybrid format where there are certain concepts that will always be trained by the partner office because they are subject to change year after year." Then there are certain subjects where we did a train-the-trainer, and we have internal staff that are responsible for training those units. We have developed an outlined curriculum, and we know exactly who is supposed to deliver which portion of the curriculum and what is the timing of that delivery. I think those are our big ones. The big things that I would say, in some cases, we did well. During implementation we were glad that we did because we recognized how important it was and then there were some instances where we had not considered something, and it was a big surprise.

JFOSE: Thank you for bringing that up. I do want to stay on this because you presented a lot of golden opportunities here. There are two areas I would love to focus on for just a moment and get some clarification on. Within the realm of one-stop, from my perspective, I have had it to where training is a constant. There is certainly the onboarding process and I want to ask you a question about timelines for that, but then there is also additional coaching. I would typically do that in the form of monthly one-stop chats. I would do it in the form of regionals, which we would have twice-per-year. We would also have a once-a-year symposium where our partner departments would come to us, and it was new information being disseminated throughout the entire network at once in one place. Regarding timelines, when you bring on a new member of the team, is there an expectation about how long this process will typically take?

TAMU CAMPUS AERIAL VIEW



ONE STOP SERVICES INTERIOR

Erin: What we refer to as new training typically takes six to eight weeks to go through the full curriculum and that curriculum contains learning one-stop policies and procedures, how to use our technology, our mission and values, and our internal procedures. Then they move through the curriculum for each of our partner offices. We structure it like you are going to learn Financial Aid now, you are going to learn our Bursar now. We have them ordered in a certain way. For example, military education benefits or what we call our veterans benefits, they do not go through that content until they have done all the other content. They have been demonstrating that they have been serving students for a period. We found that military education benefits build on everything across the board. And if they do not have a firm grasp on those other areas, they are not going to absorb that. It is held to the last. We always have a few staff who are skilled and trained and ready to assist with that population, but otherwise the curriculum can be delivered in a different order. We try to schedule that out for the year as much as we can. Our HR unit on campus has mandated that you can either start a new staff member on the first of the month or the middle of the month and we are so large, but that has helped us in terms of knowing we can only have new staff start on these dates throughout the year. So, we will preschedule training for the full curriculum throughout the year so that there is always training scheduled for whatever new cohort is coming on board. It may be that we do not hire anybody in the month of March and so we cancel the training for that next six to eight weeks, but we have it all mapped out so that we know exactly what to expect if we need to bring a partner office in to train a portion of that curriculum, they know exactly what date that they need to hold on their calendar. So, six to eight weeks for new training. Then there is a period of what we call observing and being observed. You ride in the car and watch the driver and then you drive the car, and somebody watches you drive. That varies. Typically, it is about a month after they have completed their training, but it really depends on how much they can do in between the training. We try to leave about a week in between each section of the curriculum for them to practice what they just learned.

In all, they are looking at about three months before they are working in an independent capacity. All emails are reviewed before sent and they start on email because that is an easily monitored contact method.

After that they move to phones because that hold button is a blessing when you are training and learning. Then they are not scheduled at the front until they are deemed fully competent based on their supervisor's assessment, they feel ready to be upfront in face-to-face with students. That can be intimidating for new staff. Three to four months before we feel like they are a fully functioning independent staff member. That said, the support does not end there. At any point in time, throughout the day, we always have a point of contact designated. That could be anywhere from the assistant directors in my office down to senior level advisors that will serve as a point of contact. They are usually just working on emails or something else, but they are available for anybody to come in and ask them questions or take an escalated call, things like that. We have weekly staff meetings. Our business hours are Monday through Friday, 8 to 5, except for Thursdays. We are approved to delay our opening until 11 a.m. So, we have our student employees that are at our triage desk where students check in and they can help with very high-level questions, but otherwise we are closed until 11 a.m. and we use that time for staff training. Staff training may be Aggie One-Stop staff delivering training and refresher. We do a lot of just-in-time training. Looking at the calendar and what is about to happen, we will say the drop period is about to open, so we are going to get all those questions about what happens if I drop this class. So, we refresh everybody on that, or we may bring in another office. It could be one of our partner offices or could be any office on campus to help expand the awareness of my staff and what is available on campus and how that office might impact on our office and vice versa. That happens every week. We do once-a-year full staff retreat. We are closed for the day. We go off site. We will do some deep dives into topics, team building, soft skills development. There is a full day just devoted to professional development.

JFOSE: I know that some one-stop teams at other colleges implement a formal service agreement with their partners. Others have an informal relationship between them and the other departments. Where do you kind of fit in this?

Erin: We do have service level agreements. I think every school does them a little bit differently. For example, ours are in an Excel spreadsheet. It is essentially a very detailed list of all functions and competencies or areas of focus for each of our partner offices. We asked when we were in the implementation phase that they list out everything that their customer service team would have been responsible for knowing and doing as well as list out the responsibilities that the staff that would not be

TAMU CAMPUS AERIAL VIEW

moving to the Aggie One-Stop would retain and we have listed those out by tier. Though it is not a comprehensive list. We have tiers of student employees, my advising staff, my senior advising and managerial staff, and then our partner offices. It distinguishes who can do what, who has access, and who is responsible for doing that. I cannot emphasize enough how important that is. What it has done has been a lifesaver because things move so fast on a campus this large. This campus has been through a lot of change recently and it is nice to be able to come back and revisit and say, "Actually, we agreed that the one-stop was not going to do that." It is a refresher for everybody that so far has been appreciated. It makes it very clear that we stop here, and that is reassuring for my staff that they are okay to make that handoff because we agreed that would happen. It holds everyone accountable to improve that handoff process and make that as smooth as possible for the student. They understand that it needs to be happening. It is outlined in that service level agreement. Now, you must revisit them frequently. We were initially looking at them once a semester because we were moving so fast in our first year and uncovering new scenarios that were not outlined in the service level agreement. Going forward we will probably do a twice-a-year review. Once in the spring and once in the fall. I think that should be sufficient and it is a good time to come together and identify new things that have come to light that we need to document and make sure that it is clear. We always like to say if we all won the lottery and did not come back, how would the next people run this one-stop?

JFOSE: Thank you. I know that with my teams in the past discussed this. I like to think of it on the same lines as the Pareto Principle where we are capable and trained to 80% of the functions that the expert offices would have. Whereas the expert offices are responsible for that other 20%, which incorporates things like processing, answering those expert level once-in-while questions. That is where I think some of the confusion comes in, on the side of understanding that relationship. Have there been times where you have had to address siloing between certain departments? For example, a partner department might try and take back certain control, or they may say, "I do not know that you guys are doing this correctly. We should probably take that back over." Have you had those kinds of conversations?

Erin: To date we have not had any conversations about partner offices wanting to take back anything that the one-stop was initially given responsibility for. I know that during that first year of implementation there were concerns of whether we could do those things, but we have navigated through the majority of that and we just came through our fall peak, and I am shocked at how settled we are the second week of classes. We were not here last fall. We were still inundated and backlogged. So, things have gone well. I am fortunate to have great leadership in the partner offices that are willing to work together. The one-stop was under discussion for many years, but these units have worked well together before the one-stop. The one-stop really was not formed to solve major problems like a lack of coordination between these offices. The fact that they were separate units with separate customer service teams just meant that there was a limit to how well we could work. We have not had any discussions about taking back anything. We do still have some areas where the partner offices retained responsibility for a certain function within their office, but that function does not have a customer service arm within itself, so we field a lot of questions about that. That is probably where we need to focus. If we are going to get 80% of the questions or 90% of the questions about this function, but we really have very limited insight into what is happening, that makes it very challenging for us to be able to adequately answer those questions. It is a question of access and being in separate systems. That is probably where our challenges lie. I think they are very happy to have Aggie One-Stop continue to do what we do. We are really into those nuanced conversations about small functions within the office and how do we continuously improve. I am pleased that we have put a lot of big challenges behind us, and we are operating well collectively as a group of partners.

ONE STOP SERVICES INTERIOR

FUTURE OF ONE STOP AT TEXAS A&M

JFOSE: What is next on the horizon for Aggie One-stop? What do you have planned over the next year, two years, or even up to three or four years?

Erin: We are very excited to be implementing Salesforce. That is going to be a big undertaking. I am aware that I probably should not be too aggressive in any other goals for the next six months to a year after speaking with a lot of our colleagues in ISSP; that is the big one. Having a robust CRM where we can have all the contacts and communications in one place is very exciting. We are also looking to implement some financial literacy, or financial wellness education from within the Aggie One-Stop. I am not sure what that is going to look like yet. We explored multiple options, settled on one, but now there have been some changes and so we are not quite settled. I am not at liberty right now to say what we are going to be doing but we are working towards a longer-term plan of implementing self-help resources. Student guided financial literacy resources, and then down the road more in-person workshops, presentations, appointments. We are talking years down the road. Financial literacy is in my five-year plan.

We are working on expanding our role in new-student orientation. In our first summer, we were just getting our feet underneath us and we had very little ability to take on anything beyond our basic service channels. We have a lot of new student conferences. Our freshman class is almost 15,000 this year, so we have new student conferences taking place two or three times a week from May through August. I did not have the staff or the capability to have somebody present at every conference and to staff resource tables at every conference, but we did play a role in updating all the online orientation materials, the presentation materials, everything that they are given. That 360-degree perspective really helped, because the tendency previously was to organize things by your office—this is what my office does, so here is my section. But so many things correspond to each other, and it makes sense to a student to be paired together, not necessarily organized by the office. We were able to offer that perspective and put things where they need to be to help the students see the big picture. We are hoping to expand our role and do more presenting and resource tables as well as continue to contribute to the organization of the information for new student orientation. We are finally fully staffed. We opened with some vacancies because we did have some turnover and then we added more positions during our first year. It has been a long road to hire and find the right people and get fully staffed. So, we are fully staffed, but I have a very green staff.

ONE STOP INTERIOR VIEW

This next year our goal really is to continue training and develop my staff even further, but we are already seeing the benefit of having a full team. It has been nice to see how seasoned the staff that have been with us since we opened are. I am going into this fall, and they know all the answers to many questions.

One thing that we are working on is that there was a major restructuring of the campus to centralize a lot of the service units. Many offices had their own marketing staff and communications staff embedded within and reporting up through either the college or department level. Those positions were centralized under the Marketing Communications division. The same thing happened with accounting services, human resources, and IT. All of this was happening while we were forming our one-stop. We are looking forward to working with the new Marketing Communications unit to standardize communications from our partner offices, to determine what needs to be branded Aggie One-Stop and consolidate information on the website. That was a project that we have already made some progress on, but we are hoping to make more progress on that.

JFOSE: Earlier during our conversation, you said that Texas A&M works with approximately 75,000 students. Is that primarily from one campus or is that multiple locations?

Erin: That is multiple locations. The College Station campus, which is the primary campus for Texas A&M University. The Texas A&M system is very large. You will hear people reference places like Texas A&M Commerce or Texas A&M San Antonio. Those are part of the system, but they are not Texas A&M University. Texas A&M University is the flagship original institution. The primary campus is in College Station and has about 69,000 students enrolled at that campus. The Texas A&M University also has a Galveston campus. And it has a campus in McAllen, the Higher Education Center at McAllen. We have a health science center, so Texas A&M Health. It comprises the College of Medicine, school of dentistry, public health, nursing, pharmacy, and they have campuses throughout the state. I could not name them all off the top of my head and then the school of law is in Fort Worth. We support all those students. There is only one Aggie One-Stop. Now the Financial Aid office has dedicated financial aid advisors that work with different populations. For example, there is a financial aid staff located at the Galveston Campus. There is a financial aid staff located at the McAllen Campus and the School of Law. The Bursar's office has representation at the Galveston Campus. There are some campuses that have some representation from our partner offices there—primarily for students to walk in and get assistance in person—but every single student of those 75,000 will need to work with Aggie One-Stop in some way, whether it is registration, billing questions, financial aid. We serve a wide variety of students for a large campus.

JFOSE: What comprises the team of the Aggie One-Stop? Earlier you said that you had student employees, senior one-stop advisors, and you have the director obviously. What type of tier system do you have?

Erin: My team is comprised of 45 full-time staff. Seven of those staff are what I consider my leadership team, which is myself,

ONE STOP SERVICES FRONT DESK

two associate directors, four assistant directors, and then we have a program coordinator position that maintains our CRM. They are configuring it, writing reports, pulling that report, updating. We have 37 student facing full-time staff. Their official title is Enrollment Services Advisor. We do have a career ladder within the Enrollment Services Advisor title: 1, 2, 3, and 4. As a staff member progresses up that career ladder, they take on more responsibility for handling escalations and for serving as a point of contact for other staff. Currently, there are two Enrollment Services Advisor IV's who supervise our team of student employees and serve as an extension of the leadership team and as senior advisors. Since we are so new, we are still developing that career ladder out and identifying what are the increased responsibilities. Most of my staff are level one Enrollment Services Advisors, because we have done a lot of hiring in the past year, but we have been able to promote some staff to ESA 2's. They take on responsibility for giving presentations, crafting those presentations, they serve as a point of contact, a mentor or trainer to other staff. We have an Enrollment Service Advisor 3 who is responsible for maintaining our chat bot. Then our 4's supervise our team of student employees. We would not survive without them. We have 25 to 30 peer advisors at any given time during the year. They are part-time student employees. They can be undergraduate or graduates. We have a mix, and we use them the same as our full-time staff. I am always intrigued by offices that are hesitant to employ student employees because of conflict of interest. From my time in the financial aid office, we always had student employees providing customer service to other students and found that it really works well and there is a lot of benefit to it because your student employees can help you understand the student perspective. You asked me what the ratio is, and it is one to 1,600 or one to 2,000 depending on how you calculate, whether we are just talking about the College Station campus or the full enrollment.

JFOSE: I do want to ask you about that because some colleges look at their one-stops as relational and others look at it as transactional. Where do you think Texas A&M falls in that? Do you have specific one-stop team members designated towards a specific student or can anybody just come in and get help at any time?

Erin: We fall more into the transactional. We do not assign caseloads to advisors. Everything is walk-in. We currently do not offer any appointments. It has been something that we have discussed. Are there certain populations on campus that we should have a dedicated team for? But we are a long way away from that. Right now, it is walk in and see us, call us, email us and for the most part everybody can respond to any student.

JFOSE: As we close, is there anything that you would like to add for our readers to know about Texas A&M?
Erin: It is a wonderful place to work. College Station is a great community. If anybody wants to make a move, I would highly recommend it. We are a big school, and implementing this one-stop has certainly been a big undertaking. I am proud to say that I feel like we have done it well. If any other big schools are concerned about trying to make this big of a change, I understand that at a school this big making a big change and opening a new department is not very common, but it is worth it.

JFOSE: Can I ask one final question? You mentioned chat bots in the conversation. Where do you see AI affecting the one-stop model?

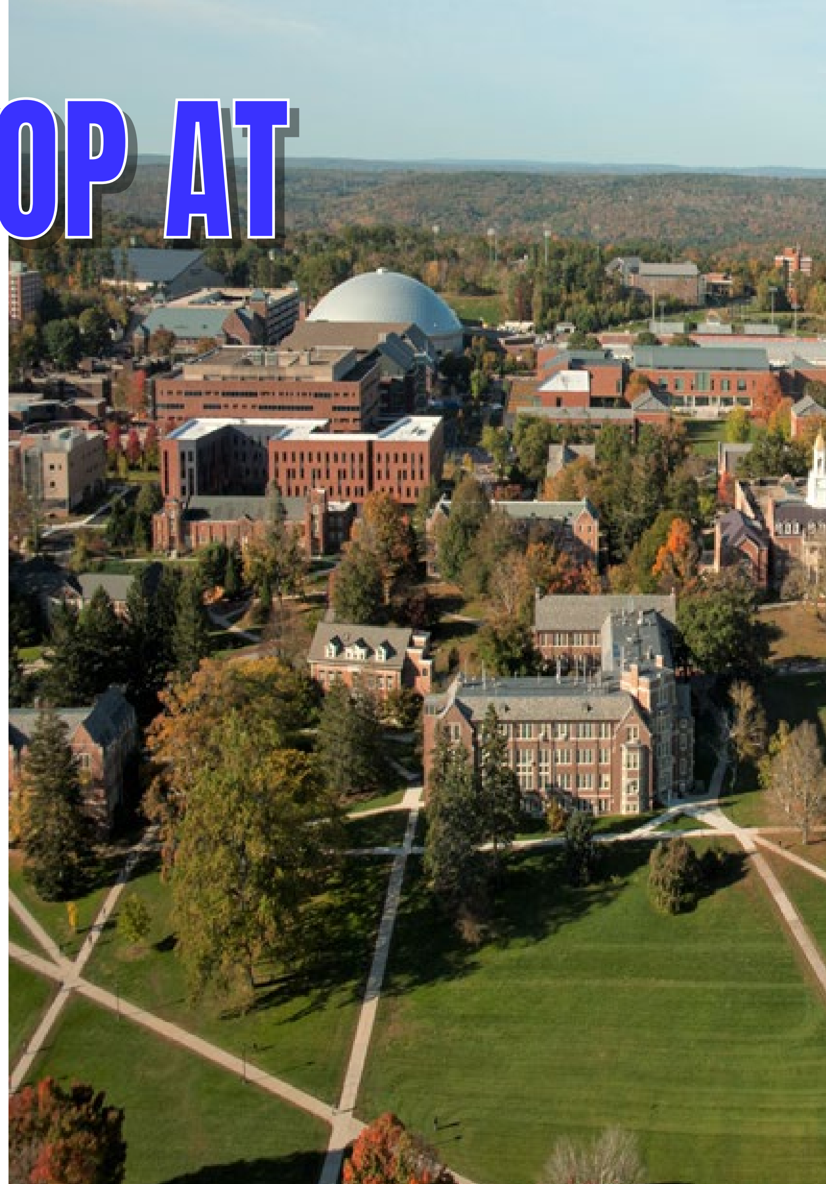
Erin: The chat bot we are currently using has just issued a new release that does use some AI. It has its pros and cons. For example, although it more quickly "learns" new content on our website, it can struggle to provide the correct response if the question asked could have multiple interpretations, such as "what is the application deadline?". Do they mean admissions application? Financial aid? Graduation? I think that AI is in our future no matter what industry you are talking about. I just do not know what that timeline is for us to see benefit in terms of improving the service that we already offer or reducing contacts and cost savings. I do think that our chat bot offers benefit to students as it is right now, but it is time consuming to maintain. Somebody spends a couple of hours a day making sure that the responses that it gives are accurate and that it can provide the correct response for the question, no matter how the student happens to ask it. It is yet to be seen whether AI is going to be able to do that. I do think AI is the future. I think that the big question is just the timeline, because we have such big volume, and the risk is high for providing incorrect information.

JFOSE: Erin, thank you so very much for taking the time to meet with us today. I really appreciate it.

Erin: Thank you. I appreciate the opportunity.

ONE STOP AT UCONN

MIKE ORMSBY
UNIVERSITY OF CONNECTICUT
ONE STOP STUDENT SERVICES DIRECTOR


UCONN CAMPUS AERIAL VIEW

I got my master's in higher education and student affairs at the University of South Carolina. From there, I started as a residence hall director at the University of Hartford. I spent a few years being a hall director, then moved over to career services and did that for a few years. Then I moved over to orientation and ran orientation for a little while, and that position was combined with advising and began my experience in advising. I call it supplemental academic advising by which I mean working with students on probation. It was not a specific, defined case load, but I worked with students who were missing satisfactory academic progress or needed extra guidance. While doing that work, we expanded that office from two staff members and a part-time employee to about 18 people. We transitioned all incoming first-year students from faculty advisors to professional staff advisors during that time as well. Those staff taught first-year experience and they had a very comprehensive portfolio working with first-year students providing wrap-around services of adjustment to college, advising, billing, registration, and financial aid. They also provided customer service in billing, financial aid, registration, for all students at the University. After doing that for about five years, this opportunity became available at the University of Connecticut. Now I am hoping to implement some of the things that I learned in that process here at UCONN and I am fortunate to have a tremendous group of people here in One Stop to do so.

Mike Ormsby
University of Connecticut
Director of One Stop Student Services

UCONN
UNIVERSITY OF CONNECTICUT

BACKGROUND ON UCONN

JFOSE: Thank you. For the benefit of those who have not heard about the University of Connecticut, can you share relevant history about your college with us?

Mike: The University of Connecticut is the flagship institution within the state of Connecticut. Our main campus is at Storrs. We also have four regional campuses totaling about 32,000 students. The model here as compared to where I am coming from is a little different. Right now, we are focused on undergraduate admission, financial aid, and registrar functions slowly working to incorporate answering questions about orientation as well.

JFOSE: Do you know how long Connecticut has been around?

Mike: Established in 1881.

JFOSE: You are at a very interesting time in the development of your One-Stop model is coming out coming up in January of 2024 when this issue gets published. Can you tell us about the thought process behind wanting to develop the one-stop?

Mike: It was a combination of things that came together to develop One Stop here. Our Vice President for Student Life and Enrollment was reading and hearing about the idea that even prior to the pandemic, institutions were putting together One-Stop services so incoming students would have more services in one place and less complexity. Combined with that, he started asking some staff within the division to start to explore that idea and what something like that might look like. That was combined with data of increasing first-gen students, gaps in achievement, data points referencing students from underserved backgrounds, and anecdotal feedback from students around campus about trying to work through administrative tasks. From there, he hired a consulting group that did some institutional research and spent time with students, staff, and faculty to get feedback on what were the needs and what something like that might look like. I had the benefit of walking into that and working with the process with all that great information we collected, and it set a good foundation for me to build upon here. They established some working groups: a functional group and a steering committee that provided some feedback to me and to our group moving forward. That created a great structure for putting plans together and being able to act within the last six months.


WILLIAM F STARR HALL


WILBUR HALL AT UCONN


PATHWAY AT UCONN

BENEFITS OF A ONE STOP MODEL AT UCONN

AREIAL VIEW OF UCONN CAMPUS

JFOSE: Excellent. This is going to be a fascinating case study to see how it develops over the course of this next year. I would love to ask you a bit more about some of the student feedback that was received in the development process. What did students think or what did your university think would be some of the benefits that the students might receive from a one-stop as well as what are some of the benefits directly for the university?

Mike: The thing that was really struck me when I started in this role is, our Vice President, Nathan First and his focus, as well as throughout the division, the focus has been on students being the priority. It is not what works best in terms of physical space or in terms of staffing or those kinds of things. The interest is always what is going to make the student experience better. The feedback that I have reviewed and seen by the consulting group and other people on campus showed that students experience "run around." A student walks into one office and asks a question and they need to go to another office, or they get that first question answered and they have a follow-up question, but then it is connected to something different. The thing that I have tried to share throughout this is that there is nothing necessarily that people are doing wrong in that situation. They are following the instructions that they have and wanting to give the students the best information possible. We must think about changing the structure and if the structure is creating a problem. Feedback from students said that they were experiencing getting bounced back and forth between different offices. One of the surveys issued was generally asking them, "would you like all of these services in one place?" The answer was a resounding "yes." We also had some feedback from staff encouraging the same thing – changing the structure to fit the students - rather than trying to fit students to the model that we have. The idea is that we should start with the student and map our services around what the student needs. I am sorry, what was the other part of the question?

JFOSE: The other part of the question was simply what do you feel that the benefits are to students and the university as a whole?

Mike: One of the primary benefits to the staff that are involved in this is that they gain additional skills. From what I have seen in the past, the staff become far more marketable. There are a lot of things that they can add to their resume. Rather than a financial aid person or a registrar person or a bursar person, they become an enrollment person or a student life person. Institutions are regularly looking for individuals who can have a larger view of things and recognize how things in different areas interact with each other to influence the student experience. That is a tremendous value to the institution as well. The more people who can see how different parts of the student experience interact, the more recommendations for improvements can be made, problems can be caught and rectified, and the more empowered staff feel to make those recommendations. The other piece is that students and families walk away happier after these experiences. When we say, "run around," I think most people have a general sense of that. We have all had an experience of following a customer service line or trying to interact with some kind of customer service process, and we know when it works, and we know when it does not. We are happy when it works and we are thankful and appreciative, and it can also get frustrating when it does not work. The benefits for staff in the university are having happier students and happier families.

JFOSE: Can you help us envision what the one-stop model will look like? For example, I know some institutions use student workers, some have a tiered-based system, others have an amalgamation of the entire piece. What do you envision your one-stop is going to develop into?

Mike: Right now, we have somewhat of a tiered structure, and it is based on experience. I will start with the modes. We are planning on having teams that will be working on phones for any day of the week, a team working on emails, and a team working on in-person and monitoring any hiccups from our chat bot. Those are the three modalities that we are focused on, and we have student staff on each of those modes as well. We are expecting to keep students in each of those modes, but we are planning on rotating our staff amongst those modes. Within our staff we have a couple of administrative staff who will likely be like the structure that I mentioned with students and will stay in those modes. Then we have our Student Success Specialists. Then we have folks who have more experience beyond that. These are our Lead Student Success Specialists. Our Leads have more experience in their home offices currently. Based on their experience and within their role, but also at the university, we anticipate that they will be able to assist our Specialists and our student staff when more complicated questions come up. Beyond our Lead Specialists, we have our Assistant Directors. So, Lead Specialists, Specialists, and students will be front line serving students. Our Assistant Directors—we have three of those folks—each have a team of Leads, Specialists, and student staff. Those Assistant Directors are going to be taking more complex issues and managing those processes and making decisions on what they need to do for that situation and working with Leads and Specialists to respond back to students and families.

JFOSE: You are being presented with a golden ticket right now to be able to develop this and I know you understand that as well. When colleges out there start a one-stop model, usually they must migrate in certain technology, maybe multiple platforms. In addition to the chat bot, what types of technology are you looking at using?

Mike: Right now, we have more pieces of technology than I would like to have. Part of that is that starting in January there are a lot of unknowns in terms of how our staff are going to use the tools and what the end results are going to be. I did not want to jump into a particular tool only to have it be the wrong one. For this coming spring semester, we are going to use the tools that we have at hand. We have our SIS, PeopleSoft. We have a homegrown advising platform, Slate for prospective students, Jira as a ticketing system, our phone system platform, and a host of other internal programs for uploading documents, policy and procedure storage, etc. We're trying to figure out the best set of tools to match what we want our processes to be, but right now we've got a lot of square pegs, round holes, and very little for workable solutions. We're going to need a lot of duct tape and patience from our staff. Long term, one of the things that is on my list for within the next year to two years is being able to better identify how we use those tools and to ask, "is there one that stands out that we can use as our go-to platform?" Another big challenge for us is the upload time. Most software platforms that one-stop offices are using and outside of one-stops, the turnaround time is a big challenge and that is the same for us here. How do we keep notes in something and have financial aid or the bursar's office be able to reference what is happening in our office on a particular student interaction and not have to wait until the next day to get that information? That is one of the reasons we are also primarily going to be keeping notes in our SIS for the moment. It is not user-friendly, but we are going to see if we can make something better in the coming semesters.


BENSON PERFORMANCE CENTER

JFOSE: I was going to ask about a universal note system since I know a lot of my colleagues out there use a CRM such as Salesforce, but I do understand that when you are starting a one-stop, that can be a serious commitment. I am glad that you have the SIS in place. That way if both parties on the front end and the back end can look at notes in an existing system and they both understand how it works, it should meet the needs and take a lot of the debris from what is in front of the student and sweep that away to make it a more efficient process for both of your teams.

Mike: That is what I am hopeful for. Like a lot of other things, if experience has taught me anything, it is that change is the one constant throughout this process. Even if we did pick a tool, there are going to be changes that need to be made as we learn within the first couple of months, how our staff is going to use it, how other offices are going to reference that information, how we are going to be able to run reports. Rather than preset something and knowing that it is going to change in a couple of months, I feel good about making the decision to keep the tools that we have and then to build on what we are going to learn from using those tools.

JFOSE: In terms of the case study and looking from one year over the next, do you already have ways to help measure student satisfaction as it exists right now, whether it is either a monthly, end of course, or transactional survey for the students?

Mike: You mean as an institution or as an office like what we are planning on?

JFOSE: Both. The way I look at it is when you are looking from it as an overall institution, you might have one or two questions related to one-stop mixed into that survey, whereas if you are having transactional interaction, you might have a situation where you can send those spot surveys out. Of course, keeping in mind, we do not want to oversaturate the student with a ton of surveys.

Mike: Right. The way that I am thinking about right now, our biggest challenge is probably going to be on phones. We are looking at a tool to help us manage the multiple email inboxes that we are going to be taking on and I think quick surveys and quick responses—the thumbs up or five stars kind of thing—is a start there. But there are a couple of surveys that we have going out to the student body or expect to go out to students by the end of the year that would be looking to add questions specifically for the one-stop. We are hoping to distribute our own in consultation with some of the other groups on campus that are trying to monitor what surveys are out there. I am a big fan of in-person service paper surveys. I usually hate paper but the value that provides and the fact that you can count on it in that instant is phenomenal for feedback. That is something else that we are looking at. The other piece that we are hoping to introduce is a student steering committee or student panel: collecting a group of students and running the changes that we are expecting or experiencing by that group, collecting their experiences in the office and what they are hearing from other students on campus. In addition to metrics that we can measure and feedback that we were looking to collect surveys after their interactions with us, that is another mode that we are looking to do.

JFOSE: Before we get away from the benefits, the opportunities also go along with developing a one-stop team. Are there any specific opportunities you thought a growing one-stop might want to consider before either developing their one-stop or before making that investment?

Mike: I think some of it is probably standard. Identifying the areas that you want to involve and what makes sense for your institution. At least for our plan, we are hoping to start small. We have three primary areas that we are focusing on. All those areas have people who have a wealth of experience in each of those home categories. Identifying the areas, identifying staff who are passionate about serving students and wanting to solve those issues, like the ones who are more focused on student needs and less on the beginning and the end of their job description. Collecting feedback from students and staff in terms of their experience and sharing what we are trying to do at the University of Connecticut. Having that initial feedback is important. The survey points from students saying we want more of this in one place, and staff saying we should put together these services around students rather than the other way around has been helpful in terms of sharing our message, talking about why we are doing this, and collecting buy-in from other folks. Identifying the tools and modalities that are involved. We are going to have teams based on phone, email, and drop-in traffic. Then the tools to be able to work in those modes and how that information is going to be shared. I would say those are the biggest things to consider.

JFOSE: Normally during this portion of the interview I would ask what is new on the horizon, but clearly everything is new on the horizon for UCONN. Are there certain initiatives that you are thinking as a one-stop, we might want to add an additional discipline or maybe there are certain efficiency measures that we are looking into. What is on your mind in terms of that?

Mike: One that we already talked about is identifying what would function for us as a CRM. I had to hesitate to use the term CRM because we are always going to have multiple other tools. Our SIS is not going away, it is something that we will need to be in on a regular basis, whether we are taking notes in there or not. What will be our primary tool? Hopefully something that can simplify the process for our staff and still be able to communicate information out both for reporting purpose and sharing information with other offices in real-time or as close to real-time so that it will not have a negative impact on their operations. Another big piece on our list is the regional campuses. We have the benefit here of a larger staff than other areas because we deal with more students. We are working through our training process and building that out for our staff, and we are learning some things through that process that hopefully will be to the benefit of our regional campuses. Also, talking with them about what works for their campus. We want things to be as similar as possible, but knowing that their resources, their physical layouts are different from ours, some are in a better position—being a smaller campus—that they can have more services co-located than we do currently. However, their staffing levels are different, and the needs of their students are different. Working with them to determine what is the best fit so that a student does not have a drastically different experience from one campus to another but can still get more services in one place and get more questions answered in one place. Finally, proactive communication is the other thing that is on my mind. The thing that I have been sharing with different people, and the feedback that I have received from student groups, is they are interested in text messages. Like many college campuses, we have an email problem here. It is hard for students to decipher what is a priority for them. They are interested in text messages. The way that I have prefaced it is that we are not going to tell you about an ice cream social or a dance that is happening or anything like that. One-stop would be interested in sending you messages if there is a barrier hit and it is going to prevent you from moving forward like notification of holds on their account, and asking the question, "do you want more information? Yes, or no?" If they have a balance that they are already working on and they do not need to be bugged about it anymore and they have tried everything or they are working on taking steps to resolve that then "no, cool,

UCONN FOUNDATION BUILDING

STUDENTS WALKING ON UCONN CAPUS

you keep doing what you are doing." If you did not know or are aware, but you have no idea what the next step is then they can reply "yes", and we will start to engage in a conversation with you setting up some time to talk with you. That is another thing that we are going to explore. Connected to that is talking with others on campus because I know I am not the first person to think of proactive communication and trying to get to students. Identifying what is already happening, the timing of those things, certain students in certain populations that they are trying to reach and how we might be able to help with that.

JFOSE: As you look at your student population, which you said was approximately 32,000, how would you suggest dividing those students amongst your staff in the Storrs location as well as all the other campuses?

Mike: Undergrad and grad, at Storrs about 26,000 students. Regional campuses, in total, about 5,000 students.

JFOSE: Is there a specific academic program that brings a lot of them to your central location?

Mike: That is a good question. I would not say one particularly stands out. Being in our area and location, agriculture and things related to farming fit well with our campus here at Storrs, but it is really a broad cross section. We also have a fair number of students that will start at the regional campuses and then transition to our main Storrs campus here to finish up their degrees. But in terms of "dividing them up" amongst our staff, we're trying to have a structure that doesn't do that. It's more about other qualifiers as opposed to program. We manage and process some functions for regional students, and others the regionals complete themselves. We manage some components of the graduate student experience, and others are managed by the graduate school. So, it's more about serving the whole population and recognizing the moments of when we need to introduce a student to another office.

JFOSE: Can we talk about controls for a moment? I want to get a better idea of your launch process. Some institutions of higher education have difficulty with the partner departments trying to release certain functions for a one-stop and their team to be able to address. With that being said, I was wondering, did you develop a formal or informal agreement with them to facilitate what would be covered or what would not be covered?

Mike: Some of the groundwork that was done prior to me arriving was helpful in that process. We do have service-level agreements with what I call our "home offices" and the services that we are working with in one-stop as well. We are starting to develop them with offices outside of that as well. In the process right now we're working with our Bursar office, Dean of Students Office, Advising is also on the list to develop formal agreements. The document and the formal process facilitates conversations that are important to have. Hopefully it will prevent two groups doing the same thing and saving time, effort, and resources, as well as communicating about those things in advance rather than having to do it after the fact. In my experience, it has been a great process and the people involved all seem to have a unified commitment. We recognize this process is happening and we want it to work best for each of our areas and certainly for the students and families involved. I am thankful that the discussions leading up to my hiring involved talking about service level agreements and the fact that those were expected to be established amongst our offices.

THE FUTRE OF ONE STOP AT UCONN

JFOSE: One last question. You brought up saving time and resources and I know a hot button issue these days is about Artificial Intelligence. I know you are already in the process of using a chat bot, but are there some other AI-related items that you are looking to incorporate into the One-stop model?

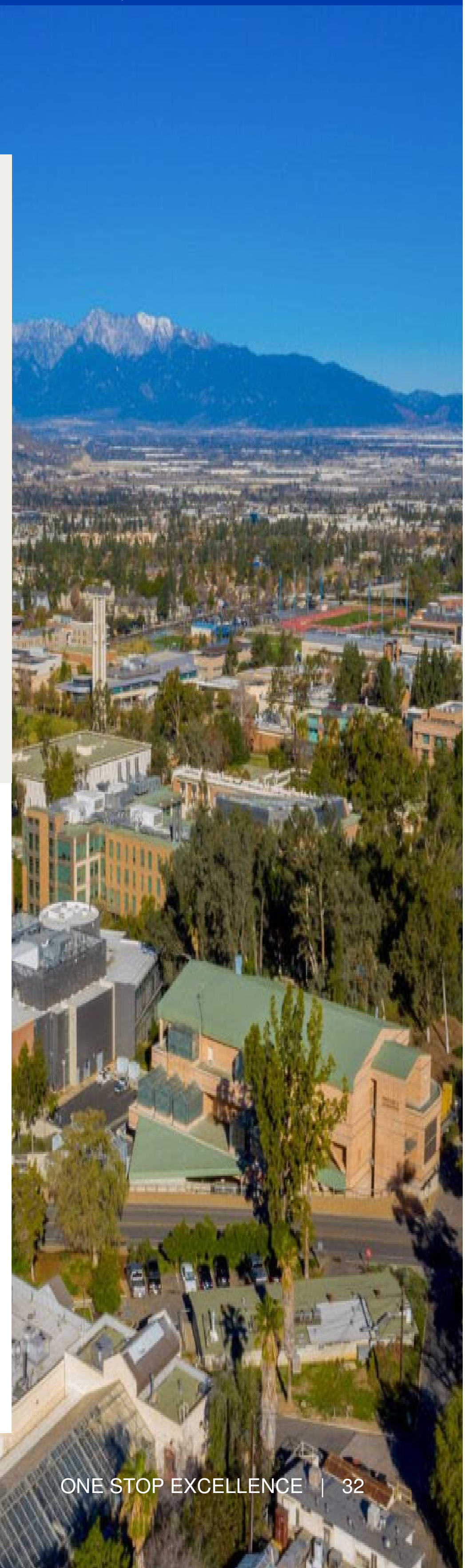
Mike: One thing at our start would probably be the email tool that we want to work with. we are hoping to get Help Scout for our email tool. It was recommended by a colleague at another one-stop office. Then we did some more research and found that for our purposes—and being that we are bringing in multiple inboxes—it would really work well for us. Part of that tool is like what you experience in Outlook or other email tools where it suggests certain language for you. From what I understand, it suggests whole messages and past messages that have been written on certain topics, and will you know allow for a much fuller draft rather than just completing a sentence, it might suggest a template to be able to use from a prior response, even from another staff member. That is something that I am excited about and hopefully will be a little bit of a time saver for our staff. The thing that I am looking at for the future is a chat bot or something like that to allow students to log in to their account and be able to get personalized answers to their questions. Rather than asking the question, "what's my balance?" and then getting a link to a how to on how to log into your SIS and get your balance, it will be able to respond with exactly "$3,500." Given where we are in our process, the fact that we are launching in January, we have the benefit of seeing how some of that plays out in other products and what other institutions are using. I do see that around the corner and hopefully as something that can be a time saver for our staff.

JFOSE: Mike Ormsby, I am looking forward to the end of this case study. I am sure our readers will be curious to see how everything goes in the year from now.

ONE STOP AT UC RIVERSIDE

EMILY ENGELSCHALL & OMAR FAUSTINO-CARREON | UNIVERSITY OF CALIFORNIA, RIVERSIDE | ENROLLMENT SERVICES

UC RIVERSIDE CAMPUS



Emily Engelschall
University of California, Riverside
Associate Vice Chancellor of Enrollment Services

My name is Omar Faustino - Carreon and I am the Lead for the UCR Highlander One Stop Shop. My home office is here at UC Riverside Financial Aid Department. I have been at UC Riverside since November of 2016, and have been working in higher education for a total of 13 years. I started my journey as a federal work-study student for a financial aid department. My experience has given me a better understanding of the overall student journey and has helped me be in the best possible mindset to guide UCR students by being analytical and understanding. In addition, being able to spot student trends to act quickly to put my team in a position to be a better resource for students.

Omar Faustino-Carreon
University of California, Riverside
Highlander One Stop Shop Lead

M have been at UC Riverside for the last 22 years. I have served in a variety of roles over the course of that time. I currently serve as the Associate Vice Chancellor of Enrollment Services. I have been in that position for the last three years. Prior to that my history was in undergraduate admissions; I grew up in undergraduate admission. Before this, I was the Director of Undergraduate Admissions here at UCR. If you asked me when I started my career here at UCR back in 2001, if I would be here 22 years later, I do not think I would have said yes. I did not envision that, but I have to say that UC Riverside was built for me, that I was meant to be here in these positions. The opportunities that it has allowed me to serve in with our current student population are incredible. The point of access that UC Riverside is for the University of California is important and I feel privileged and honored to be able to work at this institution.

BACKGROUND ON UC RIVERSIDE

UCR CAMUS SIGN

Emily: UC Riverside is a part of the larger University of California system. The University of California is a ten-campus system with nine undergraduate campuses and UCR is obviously a Southern California campus in that system. Our campus was established back in 1954. We started out as a citrus experiment station. That original building is still on campus: our school of business is housed there. When I started here back in 2001, we were roughly 15,000 students. We have grown tremendously in time and now have a little over 26,000 total students, graduate and undergraduate. A fun fact about UCR that all of us are very proud of here is that we were invited to join the Association of American Universities (AAU), which is a pinnacle achievement for the UC Riverside campus. We are a public research, land-grant institution. We have a strategic plan in place with our campus. It is our 2030 strategic plan that the campus has just finalized about a year ago and between now and 2030 the goal is to get to around 30,000 total students. UCR's growth goal is a tremendous opportunity for students to have access to experience a UC education. I am looking forward to that. The Highlander One-Stop Shop is part of that growth plan in thinking about how our one-stop needs to evolve to serve our student community. I know we will get to that a little bit later, but I think our growth plan is connected to how we are serving our current students.

UCR MAIN ENTRANCE

JFOSE: Can I get clarification on something? This probably goes hand in hand with a picture that was sent to me of a bunch of oranges earlier when you mentioned citrus experimentation. How did that whole process develop? What was the idea behind what the University of California was looking to house in Riverside?

Emily: California has a history of citrus being the region's primary agricultural export, in fact it was 1873 when the country's first navel orange trees were planted in Riverside. The UC Regents formally established the UC Citrus Experiment Station in 1907, on the land which eventually became the site of UC Riverside's campus, the 6th UC campus to be established in 1954. I am sure you have heard of the "cutie," the little tangerine that was genetically engineered to be easy to peel and not have seeds. That was invented here.

UCR HUB

WHY UC RIVERSIDE IMPLEMENTED ONE STOP

UCR BELL TOWER IN WINTER

JFOSE: Thank you for sharing that. What a lot of people do not realize, I think, is that the state of California has a robust agricultural background. Why did UCR decide to develop a one-stop model?

Emily: I was here when our one-stop was developed so I will give some background then I would love for Omar to share some of his experience with it. All of Enrollment Services, the traditional departments that you find out of one-stop—Undergraduate Admissions, Registrar, Financial Aid—used to be housed in an older building that was one of the original buildings of our campus and there were pain points with where those departments were housed within the building. Some of our student services were on the second floor of the building, other departments were dispersed across the first floor, and students had to get in all these various lines in that building to be served. It was obviously not efficient or student-centered. We are currently in our Student Services Building and we have been here for about 15 years. When this building came to fruition, the idea was to have all the departments that serve and support the administrative journey of the student be in one location towards the center of campus. The funding for this new building gave us the opportunity to think about the development of a one-stop shop, so that was built into the building plan. The great thing about it was that we were able to envision what that would look like from the beginning. We visited a bunch of different campuses as we tried to envision what our model was going to look like. One campus that I remember because I am an alum from there was Pepperdine. We visited a couple out of state campuses as well to get a sense of best practices, what works for them, what did not work for them, and then we took all those lessons learned to determine what one-stop would look like on our campus. It was a different way of doing business and, while everybody was excited to think about implementing a one-stop shop here, there was some angst about what that would mean in terms of information delivery of information and how that would connect back to the home department. Ultimately the "why" was because it is the student-centered thing to do, to not make students go from point A to point B to point C and back to point A. I appreciated the opportunity to think about it at the forefront of this building being established so that we could ensure that the setup and the structure and the flow on the first floor really did meet the needs for what the vision ended up being at that point in time.

Omar: I was not here when the Highlander One Stop Shop was implemented. It seems like it was an opportunity to take something that was archaic and turn it into something that is streamlined and beneficial for both students and staff. From my research in this role as the lead, it seems like there was a huge shift within the student services divisions on how they can better support students and centralizing seemed to be the best approach. These centralized services support the student's success from the initial entrance to the university and throughout the four years as an undergrad. It is a convenience to provide a one-stop center model that is very supportive for students where they can find all of their answers in one location rather than having to go to one office and finish a conversation there and now being directed to a completely different building on campus and having to speak to somebody else and then having to start their conversation all over again and to re-explain it. The beauty of a one-stop model is that the staff are cross-trained in multiple offices and when the student comes here, they can get ten of their questions answered. There may be minimal times when we need to refer students to a different building because that may be something that we cannot answer like athletics or case management or things like that or if they need to go buy some food, we do not have food here.

TRAINING AT ONE STOP

JFOSE: That makes sense. I can tell you that when I was the Director of One-Stop with my institution, we trained staff in about 80% of the knowledge base that we worked with as customer service in effect towards those expertise departments. I usually call them the five disciplines that we would help to manage, which were financial aid, military and VA, Bursar, registrar, and admissions. Thinking in terms of the process of bringing on new members of the One-stop team and cross training in that, how does that develop within the UCR group? Is there a specific amount of time that you allocate for that training or is it ad hoc?

Omar: I am involved in that training process for the new hires for the one-stop center. It is a very rigorous training program that they go through. For training, what we are currently doing is when somebody is hired on as a HOSS (Highlander One-Stop Shop) Information Specialist, they tend to begin with financial aid because that seems to be the heaviest topic to learn. That places them in a position where they go through A to Z and become the information specialist in financial aid. Then after that, we connect with the other departments represented here at one-stop center, which are student business services (student billing), office of the registrar, and the undergraduate admissions office. Then they go through meetings with different supervisors and different coordinators within those offices to receive trainings, resources, and recorded trainings. Now we also incorporated summer sessions. We also provide shadowing and reverse shadowing. Once they have officially received that training and understand all the resources, we get them out on the floor to assist students. That is something that we continue to evaluate. We are still learning a lot about student behavior post-pandemic and their needs and how they want to interact with us and the information that our one-stop team can provide to them to support their success.

Emily: Omar described it perfectly. In addition, it is constantly an iterative process to ensure that we're delivering the right information in the right way.

Omar: For sure. It is evolving and, recently, we feel the need to have additional training on how to best help students in distress, especially because of the pandemic. Post-pandemic, students seem to have additional challenges and we see that here at the HOSS, especially with students going to other departments on campus, then they are redirected back to HOSS because they feel like HOSS has all the answers. We try our best to answer as many questions as possible, but not one person has all the answers. Adding that additional training is very helpful for the information specialists so they are well rounded in the best way possible to help students that approach our stations.

JFOSE: Let me bring up one other piece and I think may fall under training, but it might also refer to coaching. Say you have a fully trained group, but then you have something new that hits the industry like changes to the FAFSA that are coming up. How do you administer the new training for something like that? Is it something where you do like a monthly chat? Do you do a regional where you try to bring everybody together? Do you do a symposium where both the financial aid office and the one-stop are involved in that, how do you make that work?

Omar: Great question. We meet twice a month and call it the HOSS Operations meeting. We meet for one hour and sometimes we dedicate that hour for the departments to give trainings to the HOSS information specialists. A lot of the time one hour is enough to give an overall training. We also use this time to share out weekly/monthly updates on what is going on, what is changing, what is coming down the pipeline to know what to expect moving forward for the following weeks.

UCR AERIAL VIEW

TECHNOLOGIES USED IN ONE-STOP

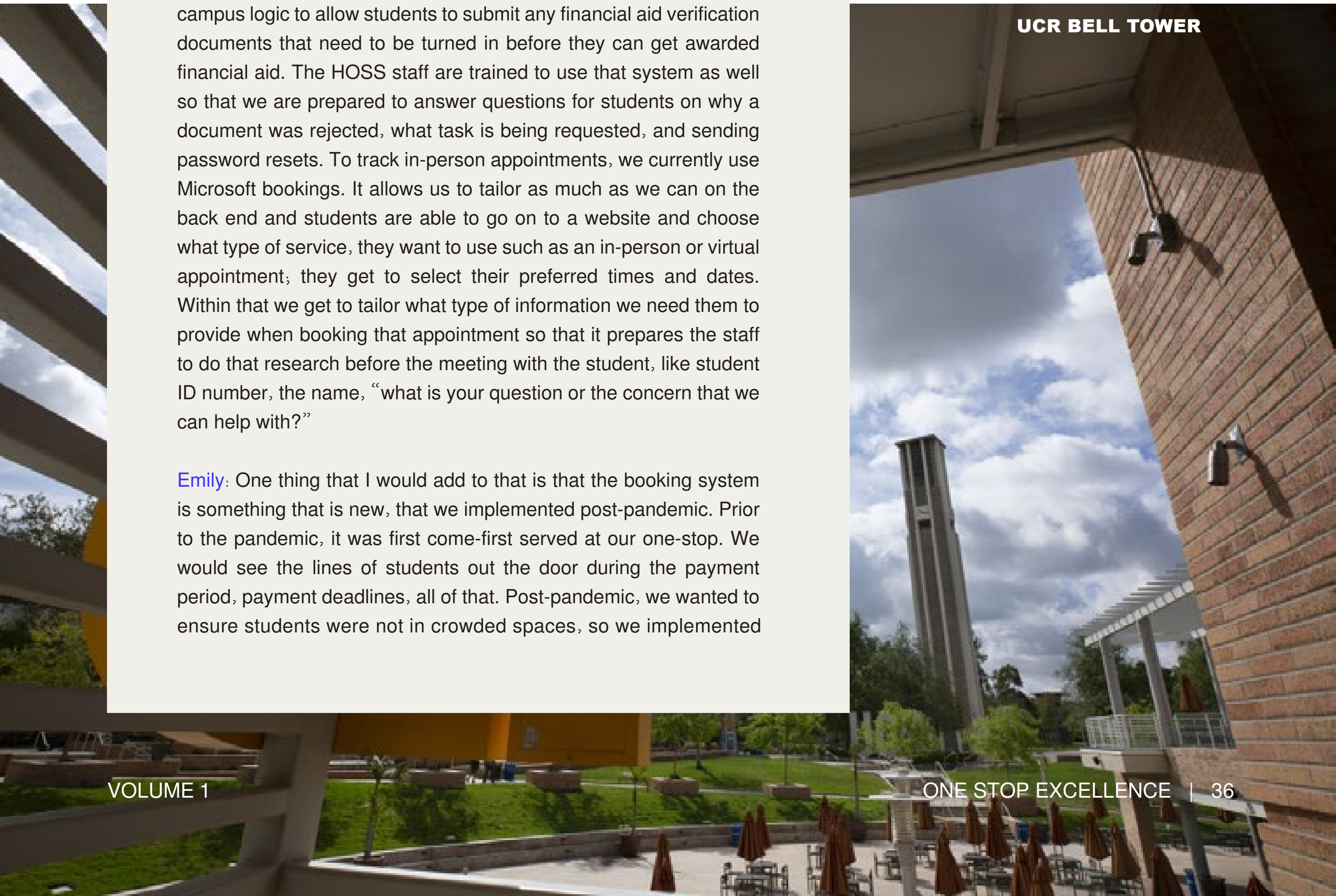
JFOSE: Before we leave this subject, I have one other question. One of the pain points that I have heard from multiple one-stops is about the challenges associated with technology and specifically of having to live in a variety of different systems. What specific systems does UCR use to manage students and financial aid?

Omar: Are you talking about a CRM where we track how many student visitors are coming to the one-stop center?

JFOSE: Sure. A CRM would be one of the systems, but also, an email system, a financial aid system. Some one-stops out there use Peoplesoft. Others are Google schools and they will use different types of Google formats to help manage things. In the previous school I was with we had Banner as our system of record. What systems do you use? Do you have multiple systems to manage?

Omar: Banner is our system of record for students and the HOSS staff use that to navigate through the student accounts to view their financial awards, billing, academic records, and any holds that students may have that are preventing them from registering or why the student had their admission rescinded: things like that. It also houses all the notes from prior conversations that were had with students. That is all saved there. Outside of that, financial aid uses campus logic to allow students to submit any financial aid verification documents that need to be turned in before they can get awarded financial aid. The HOSS staff are trained to use that system as well so that we are prepared to answer questions for students on why a document was rejected, what task is being requested, and sending password resets. To track in-person appointments, we currently use Microsoft bookings. It allows us to tailor as much as we can on the back end and students are able to go on to a website and choose what type of service, they want to use such as an in-person or virtual appointment; they get to select their preferred times and dates. Within that we get to tailor what type of information we need them to provide when booking that appointment so that it prepares the staff to do that research before the meeting with the student, like student ID number, the name, "what is your question or the concern that we can help with?"

Emily: One thing that I would add to that is that the booking system is something that is new, that we implemented post-pandemic. Prior to the pandemic, it was first come-first served at our one-stop. We would see the lines of students out the door during the payment period, payment deadlines, all of that. Post-pandemic, we wanted to ensure students were not in crowded spaces, so we implemented


UCR BELL TOWER

UCR MASCOT NEAR BELL TOWER

an appointment system, which ended up being a positive thing both for the staff and for the students so that staff were not stressing over lines of students and having to get through questions quickly. Students know that they are not going to have to stand in line when they come to see us. That is something that we have kept after the pandemic, and I think it has been a really great thing. With that said, Omar and I have talked about this a lot, that there are different technologies that would be good for us to use to track analytics better, to have a user-friendly system that is not as difficult to administer on the back end. We have had a CRM for a long time for our prospective student population, but no CRM to serve our current student population. So, the campus right now is in the process of implementing a CRM for current students. The priority right now is training the academic advisors and getting them into the system and utilizing it for appointments and making some decisions on what notes are tracked in there versus Banner and all that kind of good stuff. Once that levels out, then we will introduce it to the HOSS to utilize that system. I am excited about that opportunity because it will create visibility into the student journey. That will all be documented there. If a student is seeing an academic advisor and the academic advisor directs them to the one-stop to have this conversation, the adviser would be able to make an appointment for the student right then and there in the system. It is totally seamless.

Omar: I also want to include the Registrar's office uses Workfront. The HOSS staff are trained to assist students and explain how Workfront works. This was implemented shortly after the pandemic and students are now able to request enrollment verifications through that system. It is more of a self-service option. Students do not have to come into the one-stop center to request an enrollment verification. They can just upload it as a PDF document file, and it will be processed on the back end. Through Workfront, students are given multiple options on the delivery method. They can still choose to come in person and pick it up when ready. They can have it emailed, or mailed somewhere else if needed. Students also use Parchment to request official transcripts that can be sent to them as a PDF document or sent to a different organization.

BENEFITS OF THE ONE STOP MODEL AT UC RIVERSIDE

JFOSE: With the implementation of a one-stop model that has been there for quite some time now, what have you both seen as probably the biggest benefits not just for the students but also for the institution as a whole?

Omar: It just boils down to the convenience that is provided to students here on campus and the effectiveness to the staff. The one-stop center provides student satisfaction, which in return can lead to better graduation and retention rates. The offices and the departments represented at the one-stop center can benefit from a streamlined service and process to students as well.

Emily: That sums it up succinctly and gets to the benefits. I am probably jumping a little ahead to what is on the horizon, but I will just give a little preview here. The campus has set out this strategic plan for our growth goals for the campus between now and 2030. As a result, Enrollment Services has set up our own strategic plan between now and 2030. We have five strategic priorities. One of them is creating a seamless student experience. The one-stop plays a critical role in what that seamless student experience looks like. We have a real opportunity to take that to the next level in a HOSS 2.0 version of what we implemented to be able to approach the administrative journey of the student from their lens, not from the lens of the institution. I probably talk about this at least once a week. That is critical moving forward. Institutions of higher ed are notorious for this and UCR is not excluded. We tend to use language that students do not understand but is familiar to us. We think about things in the silos of our own departments and do not necessarily think about downstream impact to our students. Our one-stop has the opportunity, and is a catalyst for forcing cross collaboration between departments and spaces on campus that touch the student journey in different ways. We have done that well up through the pandemic and the pandemic forced us to think differently about how we are serving our student community because they are coming to us with different needs and different challenges. Like Omar said, more and more we are seeing students in distress. How can we address and meet the student to help them in a holistic way while understanding where our boundaries need to be? That is going to be our challenge moving forward, but the HOSS is at the core of creating that seamless student experience for our community.

Omar: I also want to include that this is the whole beauty of a one-stop center, and the greatest benefits are that it can be dynamic. It can be changed to match the students' needs and their expectations. We all know that evolves from year to year and the pandemic has been one of our greatest teachers in evolving.

UCR FLAG POLE

AREAS OF CAUTION

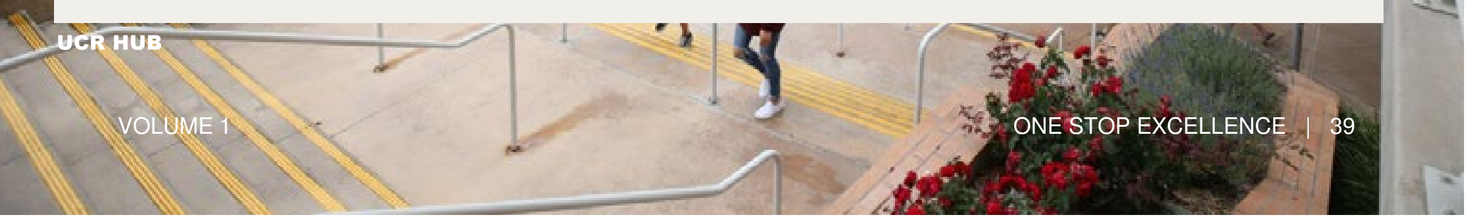
JFOSE: I do want to ask you a question about some of the areas of opportunity one experiences when starting the one-stop or when developing a one-stop. There are going to be colleges that do not have a one-stop already in place and they are thinking to themselves, "maybe I am the size of UCR or maybe I am getting to that level. What are some areas that I should be aware of when implementing a one-stop model?"

Emily: There are two points that I will touch on here. I could probably talk about several different things, but I will focus on two. One is really thinking about how the organization is structured. We are rethinking that into our 2.0 version because that has become a pain point, to be honest with you, on our campus in terms of how our one-stop is structured organizationally. When the one-stop was originally established, 15-16 years ago, what happened was one person from each of the departments was pulled from their home department and put into the one-stop and the lead role, the role that Omar serves in, is a position that oversees the operation of the HOSS but does not have any oversight of the people. So, the people still have a reporting structure into their home department. That creates some opportunity, but it also has an opportunity for creating some pain points. Really thinking about how you are structuring the organization of the one-stop is incredibly important. Moving forward, one of the things that we are moving in a direction of is establishing our one-stop as its own department and creating a director position and having all the reporting lines report into to a one-stop director. Thinking about all the different models out there and what fits and what does not; each institution has its unique circumstances they need to consider.

Omar: Often when we get together, we think about new ideas and new implementations. Sometimes we just go with it, and we implement something new. But at the same time, we do not think of things that we should also be removing when implementing something new. For example, if a one-stop center is implemented, maybe it is an opportunity to think of what task can be removed from the home department and the opportunity of how a one-stop center can better support the home department. I know some schools do this where their one-stop center does everything from A to Z. They do in-person appointments, virtual appointments, they answer emails, answer phone calls, they have a chat bot, and sometimes it is better not to duplicate those efforts. It might be best to remove something from a home department and apply it to a one-stop center because those staff may be better equipped to answer students questions because they are cross trained for multiple departments rather than the student calling one department and then only getting an answer to one other question or a few of their questions and then having to hang up the call, call a different department and waiting in the queue 15 to 45 minutes depending on the time of the academic year. I see that as a great opportunity to see what can be removed and transitioned over into a one-stop center. For us here at UCR, our current services, we are only offering in-person and virtual services to students. Like Emily said, in our re-envisioning of our one-stop center, we may consider opening an email account for a one-stop center or having its own phone lines.

Emily: What you just said is important because when our one-stop shop was established, there was an intentional decision around the fact that the one-stop was for in-person service only and the emails and phone traffic still go to the home department. So again, that is something that we are going to be looking at. Is that still the right model for us or do we need to adjust to that? There are no phones in our one-stop right now because the idea was that when you are engaging with a student in person, there should not be any distraction of phones ringing and all of that. That was the priority for the campus at the time. I think we have evolved from there that we need to rethink that. The other thing too that I was going to talk about is that it is really important to think about how the one-stop is marketed across campus: informing the student community, having a community plan for what that looks like and it is not just about educating the students, about how the one-stop can help support them, but also a communications campaign out to the faculty and staff so that they have an awareness about the One-Stop and know when and how to refer people to it. I think this is even more important post-pandemic because there are students that are coming into our institutions that for a couple of years, we were able to be in front of them at orientation talking to them about the one-stop and so they came into our space with absolutely no understanding of what that looked like and we did some focus groups that found some really fascinating information about students' perceptions about one-stop and what it was. Being intentional about how you are communicating and marketing the one-stop to others on campus internally.

Omar: I also want to add to that it is very important that departments are aware of the one-stop center, especially after a pandemic. There may have been new staff hired on that are not aware of where and what a one-stop center is. We recently experienced that as well. We are working on creating better partnerships across campus. Recently, for the first-year student orientation, we partnered with Student Health Services, Housing Administration, and our Residency and Fee Coordinator to be present at our one-stop center to assist students further that have those type of questions rather than telling the student to walk across campus in a



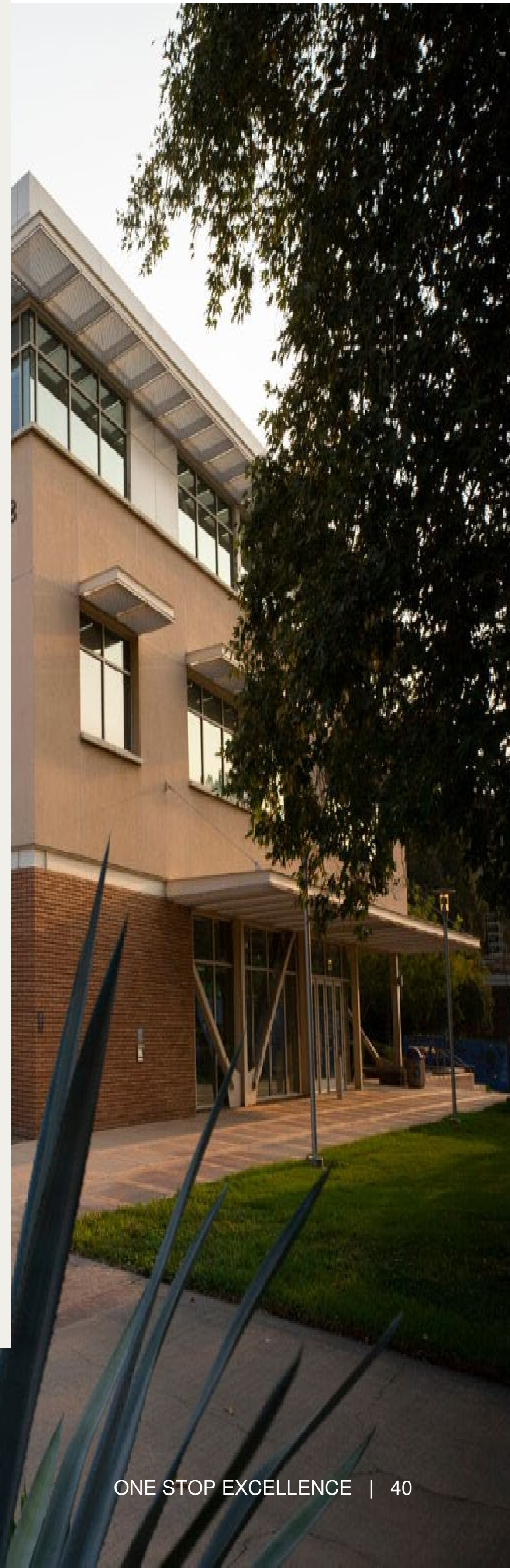
in a hundred-degree weather to get one of their questions answered. Awareness across the campus is very important.

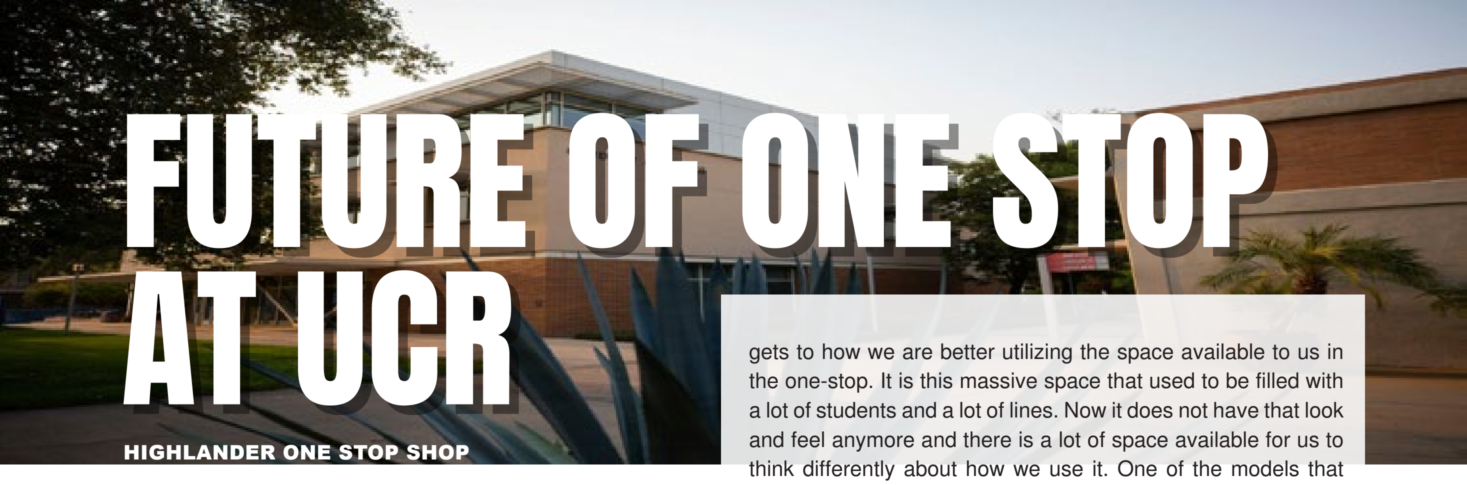
JFOSE: There are a couple of areas I did not hear either one of you mention that I would like to get your opinions on. One is employee attrition. I know with my previous one-stop team as well as several others that exist, being a one-stop specialist is not seen as the highest-level position one can aspire towards within the university. This means that often an individual might want to get additional training or move up or move out depending upon if they have their degree or whatever the case may be. Have you had an employee attrition challenge over the last couple of years?

Emily: Overall, in the enrollment services space, there have been challenges with attrition, especially when the job market was quite competitive. That has leveled out to a certain degree. We have got staff members in the HOSS who have been there over 20 years. Then there are some that tend to cycle in and out. Again, our model is that these staff have reporting lines into the home department. It will be interesting to see how that may or may not change as HOSS becomes its own department. It may help retain staff more. I do not know; maybe it will have the opposite effect. In terms of looking at all the departments that are represented at the HOSS, maybe the most turnover is in the financial aid space. There is just a lot going on in the financial aid world. When I say financial aid space, that person is trained across all the topics, but their home department is financial aid. That creates a different kind of nuance for our campus that others might not have to experience.

Omar: To that other end, we have had staff who were initially hired for the one-stop center who then later apply to positions in financial aid. So, they left our one-stop center. Being employed at a one-stop center and getting that cross training is a great opportunity for that type of thing to happen because it is a great stepping stool for applying for admissions, financial aid, the billing office, or Registrar because staff are cross-trained to do all that. In addition, that staff knowledge and experience still remains in Enrollment Services for the most part.

Emily: One of the things that we are trying to do is to support a more flexible work environment to help retain staff. We have a hybrid work schedule model for most of the departments within Enrollment Services; however, we were still asking our one-stop staff to come in five days a week from 8a to 5p. So, Omar and I had a conversation about opportunities to allow some hybrid work schedules. Maybe not as much of flexibility as some of the other departments based on the type of work they are doing, but still asking if there is some flexibility there. We found that there was an opportunity for some hybrid work given that there are virtual appointments with students. When staff are assigned virtual appointment days, they can take those virtual appointments from home and they also know that if things start getting busy in the in-person environment and they do not have a virtual appointment scheduled, they must step in to help support the in-person traffic via virtual engagement. That approach has helped with employee morale.





FUTURE OF ONE STOP AT UCR

HIGHLANDER ONE STOP SHOP

JFOSE: One of the other things I have heard from other institutions is the concept of siloing, where you have one department—a partner department such as financial aid—where they might say, "We do not know that one-stop is getting the information across. I think we will try and take that information or that responsibility back" or perhaps the clear lines are not fully established. Are there service level agreements that you have established or discussed with partner departments to determine what is and what is not going to be covered by one-stop?

Emily: That is a good question. Do you want to take that one over Omar or do you want me to?

Omar: I can take it. I think it is just a short answer. Currently, we do not have those types of agreements, but it is an opportunity for us to investigate that. The approach here has been to ask, "How much more can the one-stop help with?" Here at UCR, most departments want us to fulfill all the students' questions as best as we can. The staff at the home departments love that because it frees up their time to work on tasks such as; revision requests from students, processing parent plus loans, etc...

Emily: I agree. We are having some of the opposite conversations, which I think is good. Going back to what I was saying earlier about the HOSS pre-pandemic, it was very transactional in terms of how we were interacting with students and there were tight time limits around how much time you could spend with somebody before they had to be escalated up due to this huge line out the door. Now we have an opportunity to rethink what that looks like and think about the opportunity to have more detailed questions, or longer conversations that help the students holistically. We are trying to figure out what that balance looks like right now. How much should the HOSS be helping so that students can have everything answered right there in the moment and then only the more difficult, nuanced concerns get escalated up to the home department to help resolve.

Omar: I think that is all outlined and defined in a tiered-service model, which is something we are currently looking into.

JFOSE: Is there anything that you think we have not yet covered that is coming up on the horizon for the UCR one-stop?

Emily: From my perspective, there are a couple of things that I want to touch on here. One thing that Omar is really diving into right now is thinking through a tiered-service model. That really gets to how we are better utilizing the space available to us in the one-stop. It is this massive space that used to be filled with a lot of students and a lot of lines. Now it does not have that look and feel anymore and there is a lot of space available for us to think differently about how we use it. One of the models that Omar is looking into is the fact that students are used to navigating and getting their questions answered through a self-service model. How do we consolidate and create a one-stop self-service page that really outlines basic questions? This would be a self-service portal or tool that would allow students to take care of key business items themselves. Then the second tier is how we are engaging our student community or our student workers. I have a vision in my head of what this might look like. You go to an Apple store and you have a question and there is a person standing there with an iPad and they will check you in and then have you go stand somewhere and based on what your question is maybe a student can say, "this is the answer to your question" and the student helps support them and then they are able to leave. It is a peer-to-peer conversation. The third tier is interacting with a one-stop specialist, and then the fourth tier is escalated to the home department. That way we can serve more students in an efficient way, help serve the home department more efficiently, and create a space that is welcoming for our students while using the technology and tools that they are using in other parts of their lives. The other piece of this that I am excited about thinking through is what departments should be represented in the Student Services building and how should they be integrated into the HOSS? Right now our building houses Undergraduate Admissions, Registrar, Financial Aid, Summer Sessions, our one-stop student services, the cashier, and then some other departments that are not part of the student journey. We are really thinking about ensuring intentionality in the departments that are in the building. For example, the campus is thinking about introducing into the building our vice provost of undergraduate education and all the units that he oversees that are really about student success and retention efforts for our undergraduate student population. When I think about that I think how helpful it would be for his team to be in here when a student comes in who is in distress and thinking that this is the point in time when they are going to withdraw from the university. So the student comes to the HOSS to figure out about the withdrawal process. How helpful would it be to be able to at that point in time connect them with somebody who is in our building that has the support resources to address some of the concerns the student has and to close the loop on the student journey and help keep them here? That solidifies the role that the HOSS has the potential to be in supporting student retention efforts and student success efforts here at UCR. That is how I envision the next steps being for creating a seamless student experience for our community.

JFOSE: Has UCR thought about the development or use of AI technology with students?

Emily: We do use chat bots. For more sophisticated AI technology, we are open to its use. It needs to be done with intention and done the right way. It is interesting just going into ChatGPT and playing around in there. I went into chatGPT and I asked it to create a job description for a one-stop shop director that touches on these five topics and it generated a pretty good job description. It is all about working smarter, not harder. Of course, I had to go in and do some edits, so it still needs some human intervention, but I have had lots of conversations with our CIO about AI technology and how it can support student success efforts. I do not know that we have any answers quite yet about what that is going to look like.


ORANGERS AT UCR

JFOSE: You mentioned earlier where your campus is in reference to the total number of students where you are at right now and what the goal is. Are there any offsites or is it just the main campus directly?

Emily: Just the main campus for the most part. We do have a Palm Desert Campus that has a few small niche programs.
JFOSE: You do not have any one-stop services out there, do you?

Emily: No.

JFOSE: Some schools look at their one-stop as relational and others look at it as transactional. Based on the idea of that dichotomy, where does UCR envision its one-stop?

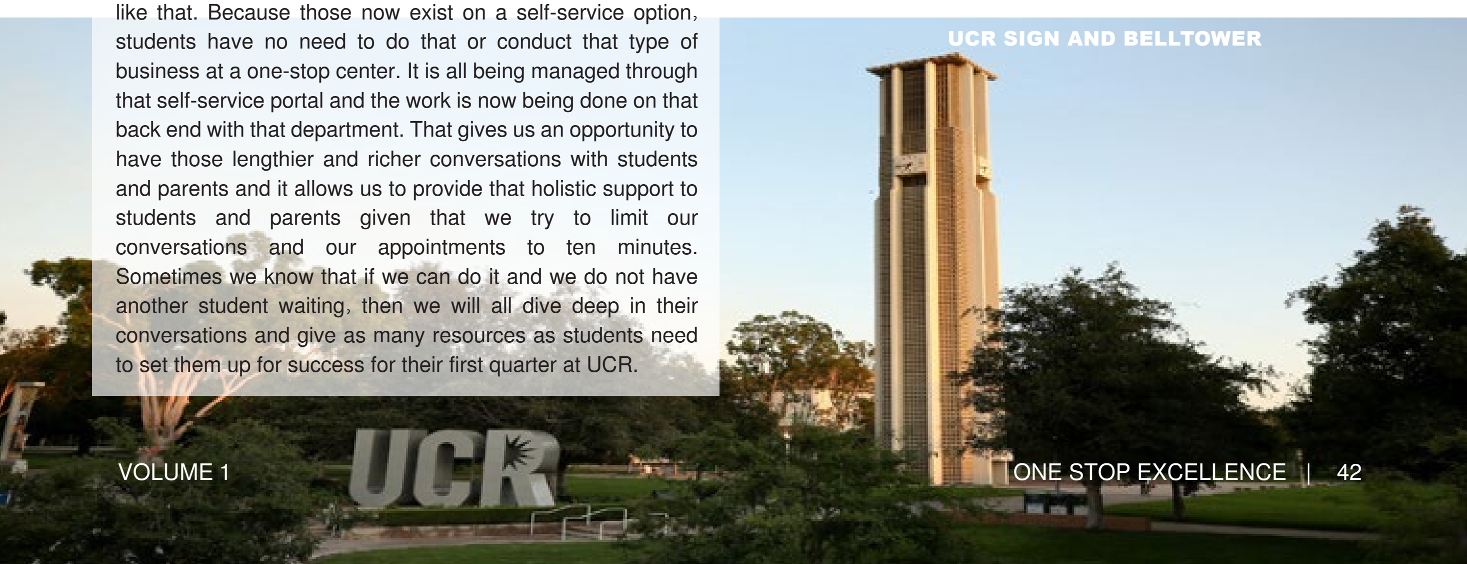
Emily: I love this question because we have been transactional. That has been our model, but we are moving to a relational and holistic model. I think that is a really important decision point for people to think about when implementing because they are two different models. Particularly at UCR, where we are currently at our institution, it must be a model that is a holistic approach and not a transactional one. I keep going back to the influence on retention for our campus through the one-stop shop. When you think about retention, you traditionally do not think about how offices like financial aid and admissions fit into that role, but they have a big role to play there and our vehicle for that is our One-Stop.

Omar: I do want to include that a lot of those self-service options that came about after the pandemic have reduced or removed that in-person transactional piece at our one-stop center. Prior to these self-service options, the one-stop shop staff were highly involved in mostly a lot of transactional interactions such as a student's enrollment verification request form, your diploma, your transcript, your financial aid documents, study abroad, financial verification letters, things like that. Because those now exist on a self-service option, students have no need to do that or conduct that type of business at a one-stop center. It is all being managed through that self-service portal and the work is now being done on that back end with that department. That gives us an opportunity to have those lengthier and richer conversations with students and parents and it allows us to provide that holistic support to students and parents given that we try to limit our conversations and our appointments to ten minutes. Sometimes we know that if we can do it and we do not have another student waiting, then we will all dive deep in their conversations and give as many resources as students need to set them up for success for their first quarter at UCR.

JFOSE: What is the current makeup of the one-stop staff? Do you have student workers? I heard you say you have the HOSS info specialists. You have your lead; you have the director. How many are part of the entire one-stop family that services your entire student population?

Omar: We have five staff members at the Highlander One-Stop Shop. One out of the five is from Student Business Services and their model at the Highlander One-Stop Shop is a bit different because in the past—about two years ago—they had a staff member dedicated to that position at the one-stop center, but then they transitioned over into a rotational model where they have four staff who are coming down to one of the stations designed for student business services. Then every day there might be someone different there. The other stations, include the expert for undergraduate admissions who is there every single day, there is one for registrar, and then two for financial aid. In addition to that, we have two student workers who are stationed at our welcome station. Their responsibility is to greet everybody that comes in the door and to give them more information of our current setup, to explain to them that we are by appointment, but at the same time we can help them as a walk-in and then we are responsible for tracking that walk-in on a shared spreadsheet. They also basically teach the students the overall layout of our One-stop Center so that the next time they come in, they know the whole process. For me as a lead, I oversee the operations of everything and I did have a station there until recently. Now that Emily has tasked me with these additional projects on the whole re-envisioning of the HOSS and what HOSS 2.0 will look like, we hired a temp. That temporary worker is now trained, so she took my position there and she is a temp for the financial aid office.

JFOSE: I thank you both very much. I will look forward to speaking with you again in the future.



UCR SIGN AND BELLTOWER

REFERENCES

All interviews are personal communication via Zoom with the subject matter expert and recording has been approved in advance. All visual aids including, but not limited to pictures, charts, and graphs are either provided by a) the subject being interviewed based on appropriate approvals from their institution and/or b) public domain images. For any questions regarding this or any other items, please contact Scott Saltman at info@jfose.com.

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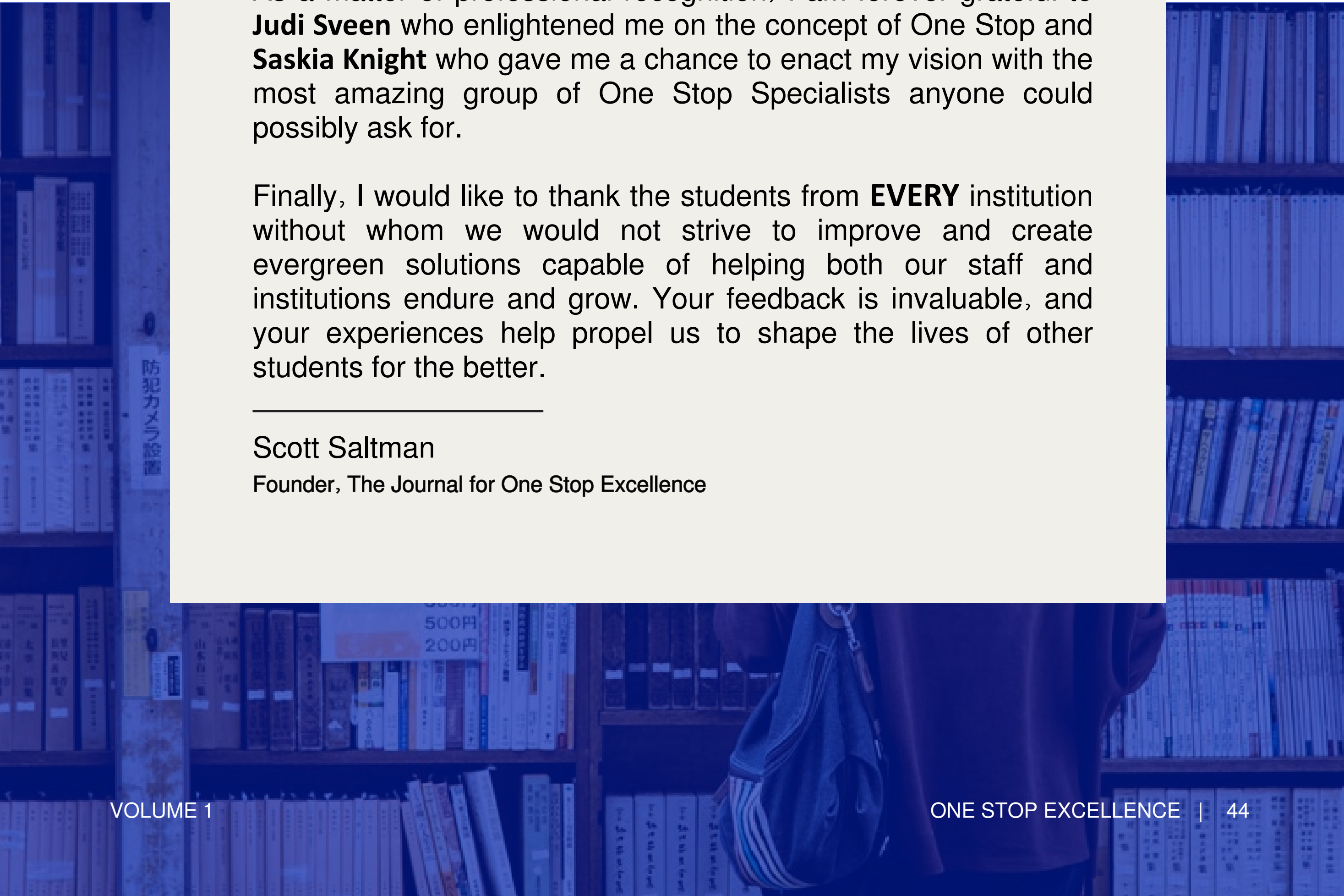
Scott Saltman

Founder, The Journal for One Stop Excellence



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