

**Nraisman & Associates Enters The Following Proposal In Response To The Request For Proposal *Development Of Board Of Regents 21016-2021 Strategic Plan***

**Contact Person Empowered to Negotiate and Contractually Bind**

Dr. Neal A. Raisman

President

NRaisman & Associates

86 N Cassady Ave

Columbus, OH 43209

413.219.6939

[nealr@GreatServiceMatters.com](mailto:nealr@GreatServiceMatters.com)

**Nraisman & Associates is a small business, self-proprietorship not attached to any parent company**

**Executive Summary**

Nraisman & Associates will use a charrette planning process which is a broad-based inductive planning process that effectively and efficiently uncovers issues that need to be incorporated into a five year strategic plan and goals. The process will involve the Board individually and collectively, the university or college presidents, administrators and faculty, representatives of the college communities, students, business leaders in Iowa and state senators. These issues will be then be incorporated into a strategic plan with quantifiable goals for the Board of Regents discussion and approval.

Nraisman & Associates consultants have all been members of the academic world serving as faculty, deans, vice-presidents and presidents so we speak academic-ese but also the language of the world outside of academia. We know that universities are both learning centers and business that must also consider the bottom line. Our work in helping schools plan a better future incorporates both.

NRaisman & Associates has assisted over 400 colleges and universities increase their academic customer service and hospitality to students since its inception in 1999. This has included working through training, workshops, service audits, research and development of service delivery systems to improve both academic customer service and hospitality to positively affect retention of students. This work has included assisting colleges improve their delivery of student services such as billing, financial aid, registration, veteran's services, advising both in one-stop shops and in traditional silo approaches. Some of the universities and colleges we have worked with include:

University of Toledo

Temple University

Monmouth University

Georgia State University

University of South Carolina

Alabama State University

Central Arkansas State University

Southern Florida University  
University of New Brunswick (Canada)  
Pratt Institute  
University of Louisiana – Monroe  
Stony Brook University  
Arkansas Department of Higher Education  
Broward College  
CUNY – Hunter  
Davenport University  
Coppin State University  
Millikin University  
Arkansas State University - Beebe  
ARAMARK Corporation  
Norwich University  
Community Colleges of Baltimore County  
London School of Finance  
Kingwood Community College  
Lincoln Technical College  
Columbus State Community College  
EagleGate College  
Hunter College School of Nursing  
Lincoln Technical Institute  
Beckfield College  
NACUBO  
Career College of Northern Nevada  
Corning Community College  
Westchester Community College  
Cincinnati Consortium of Colleges + Universities  
Landsdowne College (UK)  
Rockland Community College  
Briarcliffe College  
Manatee Community College  
Morrisville State College  
University of Maine – Fort Kent  
Herzing Colleges (12 campuses)  
ECPI Colleges of Technology  
Snead Community College  
Edge Hill College (UK)  
Porter and Chester Institute of Technology  
Universite d’Angers (FR)

Nraisman & Associates has been providing consultant services to colleges, universities and business that work with them since 1999. The firm has five employees including a president, two senior consultants and two associate consultants. We also work with other firms when needed to add their expertise.

Nraisman & Associates has had one contract terminated because we finished the consulting work ahead of deadline and was no longer needed by Drexel University; has had no litigation filed against it, no order, judgment or decree of any Federal or State

authority barring, suspending, or otherwise limiting the right of the Bidder to engage in any business, practice, or activity; no pending or threatened litigation, administrative or regulatory proceedings, or similar matters that could affect the ability of Nraisman & Associates to perform the required services.

No Nraisman & Associates has been convicted of a felony.

There have been no irregularities in any of the accounts maintained by the Bidder on behalf of others

### **PHILOSOPHY AND BACKGROUND**

Since 1999, N.Raisman & Associates has been the leading provider of assessing university and colleges for setting strategies to improve institutions especially in areas of retention and effective operations.. We have also been the leader in operational service audits as well as training and other solutions to increase success for over 400 universities and colleges in the US, Canada and Europe. Our research, writing (including four bestselling books on academic administration improving delivery of services to students and our consulting solutions have led to the universities and colleges setting in place strategies and goals to improve their success especially in areas of enrollment, admissions and retention..

Following an analysis of the request for proposals for consulting services to the board of regents development of a strategic plan we have determined a process that will be broadly based and will lead to a consensus on the strategies, goals and plan for their implementation.

Moreover, measurements of efficiency and effectiveness either internal or by external assessment can only be really understood in reference to how they accomplish meeting the needs and objectives of the end-users: the colleges and the public. They can also be understood best within a context of application to users or they are formulated in isolation from purpose. Therefore we will be certain to assure each goal enriches the end-users and can be easily assessed.

The primary experts from Nraisman & Associates to be working on this project for the Board of Regents will be:

Dr. Neal A Raisman  
President, Nraisman & Associates  
[nealr@GreatServiceMatters.com](mailto:nealr@GreatServiceMatters.com)  
413.219.6939

Dr. Marylin Newell  
Senior Consultant, Nraisman & Associates  
[Mnewell@collegematters.com](mailto:Mnewell@collegematters.com)  
207.345.3100

William E. Berry, Jr.  
Senior Consultant, NRaisman & Associates  
[bill@aaduna.org](mailto:bill@aaduna.org)  
315.283.8074

Additional consultants from N.Raisman & Associates may be added to the team as needed. Their information will be provided if they are used in the project. But it is anticipated that the three experts whose details are listed above will be the primary people working on this project. Their experience and expertise working in academic customer service has well prepared them to complete all the parts of the project.

### **Pertinent Biographies of Consultants are on pages 9-12**

#### **Statement of Scope of the Project**

Since 1999, Nraisman & Associates has been providing analysis, auditing, and study of colleges and universities to create plans and strategic goals for the institutions. As consultants, we fully understand that this is the Board's strategic plan for the system they oversee. That is an important point to make since the role of the consultants to the Board is significant to the success of the project. We know we are not to devise strategies and goals that would make any particular contingency of the universities and colleges happy but to advise the Board on what the best, discovered strategies and goals should be for everyone. We are also quite aware of the need for confidentiality in representing the Board.

This relationship to the board is one that we are quite comfortable with especially since all three consultants on this project have worked for boards of trustees/regents before.

The project is to gather a great deal of information and concerns from a wide swath of the colleges and universities as well as business and governmental entities and the public. This information needs to be unbiased by any pre-conceived ideas of the consultants but generated from the interviews and analysis we shall be doing. This information needs to be studied alongside of factors that will affect and need to be affected by the Iowa University System. These will include but not limited to probable technological changes and impact, the demographics facing the State and the system, globalization, trends in higher education as well as trends in governmental support of higher education and the State of Iowa's support for the schools.

All of the work that Nraisman & Associates has done in their field audits of colleges and universities are the development of strategic plans and goals for them to meet their intended success. In these audits we study the school, conduct intensive field interviews and focus groups to discover issues and concerns that are holding the institution back. We then devise a report that details all the issues as well as provide solutions and the strategies to implement them. We develop a strategic plan for the institution to follow with recommendations on the order of meeting the goals.

Our consultants have also led specific strategic planning processes for schools and boards in their administrative roles. For example, as president of Rockland Community College, Dr. Raisman led its strategic planning process which resulted in ten specific organizational goals for the college. This set of measurable, functional goals went the Board of Trustees for its approval. This is precisely what needs to be done for the University of Iowa System in completing the project. Another of the three consultants assisted Dr. Raisman and thus has direct experience outside of NRaisman & Associates. William Berry provided all of the logistic support for the project as well as the data and analyses the participants and then the Board needed to complete the process.

As a result of our years of developing strategic plans for schools, we are highly qualified and equipped to complete the project outlined in the RFP.

### **Appropriate References**

(Because NRaisman & Associates has provided services to over 200 colleges and universities in the past five years to assist the review we have selected some projects and references that are germane to the project and will better inform you of our capacities and work rather than list every school.)

#### **University of Toledo (OH)**

Full campus field service audit including their integrated student services center (bursar, registration, financial aid and technology solutions) Rocket Solution Central with a strategic plan for five years better structure and operate to improve functions in student services, academics, advising, technology, and every aspect of the University as it interacted with students to provide academic customer service.

Dr. Kaye Patten Wallace  
VP for the Student Experience  
University Hall Rm 3630  
University of Toledo  
Toledo, OH 43606-3390  
419-530-2665

#### **Broward College (FL)**

Full campus academic customer service audit of this 35,000 student, six campus college leading to strategic goals and recommendations on how to better structure and operate to improve student services and administrative functions to enhance meeting student needs and increasing customer service. Also studied all student services, academics, advising, technology, and every aspect of the University as it interacted with students to provide academic customer service on four of the campuses to enhance student satisfaction.

Angelia N. Millender  
Vice President Student Affairs and Enrollment Management  
Broward College  
111 East Las Olas Boulevard  
Fort Lauderdale, FL 33301  
(954) 201-7486  
[amillend@broward.edu](mailto:amillend@broward.edu)

Monmouth University (NJ)

Full comprehensive campus academic customer service audit including all of their student services in this comprehensive university leading to a major report with strategic plans and recommendations on how to better structure and operate to improve services to enhance enrollment and meet student needs through integrated service functions and better academic customer service. Also studied all student services, academics, advising, technology, and every aspect of the University as they interacted with students to provide academic customer service to enhance student satisfaction to lead to increased retention and completion rates yielding increased tuition revenue.

Claire Alasio, MA.Ed.

Associate Vice President for Enrollment Management

Monmouth University

Director of Financial Aid

400 Cedar Avenue

West Long Branch, NJ 07764

(732)571-3463

## **The Charrette Process**

NRaisman & Associates proposes using a charrette process to effectively and efficiently guide the Board of Regents in what the top strategic priorities should be in the next five years. It involves organizing people into several small groups, each of which then brainstorms ideas one-after-the-other until everyone involved has had a chance to contribute fully. Derived from the French word for wagon, it come from the practice of architecture students in the early 1800s, who used carts to rush their drawings from one place to another to get final advice and approvals. In much the same way, the Charrette process takes the ideas generated by a group, and carts them over to the next group for them to be built upon, refine, and finally prioritized. It assures each participant a maximum input while demanding the least amount of time involved yet leading to a consensus of the whole Board.

The Charrette process allows for maximum participation in idea generation without compromising the quality or effectiveness of the brainstorming. The benefits of the process include:

- Effective use of participants' time because many issues can be discussed at the same time;
- Improved buy-in from stakeholders because every participant has the opportunity to contribute ideas on each issue;
- Encouragement of high quality options because the most significant ideas are polished with each round of discussion;
- Elimination of stalled discussion, because new people can progress an issue on each round.

The process will be broken into four segments leading up to the charrette itself.

### **Segment 1 Information Collection**

During this segment, NRaisman & Associates will compile background information and knowledge needed by the Board to determine their final strategic goals for the schools. We will be interviewing all nine Board members individually to assure their ideas are heard and included. We will also interview the presidents of the five schools as well as significant voices among the academic, student services, technology, and student community at each school. Additionally, Raisman & Associates will interview business leaders in the State of Iowa as determined by the Forbes top companies in Iowa. We will also include state senators.

The information gathered by these interviews will be reviewed and analyzed to determine the significance of each in a hierarchical structure with the most shared concepts at the forefront and least noted ideas toward the bottom. The concepts will then be organized by factors that will affect the schools under the Board's purview. These categories will include:

- technological changes and their impact on higher education
- demographics
- globalization
- trends in higher education
- trends in governmental support of higher education
- the State of Iowa's support for the schools and
- miscellaneous.

### **Segment 2 SWOT Analysis**

NRaisman & Associates will use the information gathered as well as realities of key factors affecting the University system to conduct a SWOT analysis with a focus group formed from participants in the information gathering segment as part of the preparation for the strategic planning process.

### **Segment 3 Communicating the Background Information**

The organized concepts will be analyzed and notated with additional information and facts to fill out the concepts generated. This will be used to compile a background briefing booklet for sharing with the charrette participants and the communities of the five colleges. The briefing booklet will also be shared with the participants in the interviews to assure them they were heard and their ideas taken into consideration. Finally, three copies of the briefing booklet will be placed in the colleges' libraries for interested members of the college communities and an announcement of such will be made.

A thirty day comment period will surface additional comments and clarifications of the information in the briefing booklet. period.

#### **Segment 4 Review and Reconciliation of Community Comments**

All additional comments will be analyzed. When appropriate, comments will be worked into the background booklet to assure all voices are heard and the best ideas are brought forward. The booklet will be updated to include appropriate comments and sent out to the charrette participants. To save time, new comments will be highlighted so the entire booklet does not need to be reread.

#### **The Charrette**

A charrette is held based on the background briefing booklet. This will make the charrette itself more efficient and effective since all the brainstorming will have been accomplished through the booklet and its concepts as organized by the categories listed above. NRaisman & Associates will be facilitators.

Participants in the charrette will include Board of Regents members, the presidents of each of the six school, the deans or senior administrators of each school, five representatives of businesses in the State, five State senators, a student from each school, and a representative of each college faculty. The charrette will be held at the State University of Iowa in a large enough room to accommodate s roundtables for discussion of the categories.

In the charrette itself, the participants will be assigned a table to assure there is broad representation to include a Board member, a college president or senior administrator, a representative of business, a State senator, a student, and a representative of the technology faculty of each college. Each table will be initially assigned a category to review and discuss from the concepts generated through the interview process not starting all over by brainstorming. After a designated time for the discussion, one member from each table will move to a new table and lead the new group in a discussion of the topic that was vetted at his/her first table. This roundtable process continues until each group has had an opportunity to discuss each of the topics addressed in the revised briefing booklet. The category leaders will have time to assemble a report to the whole group from all the discussions, refinements, and expansions from meeting with all six table groups.

The charrette will conclude with a plenary session during which each category leader presents the five most significant results from the morning's charrette. After a presentation of the ideas, there will be open plenary discussion leading to a taxonomy of the ideas from most significant to least important.

#### **Presentation to the Board**

The results from the plenary sessions will be analyzed by NRaisman & Associates leading to a unified, detailed report of strategic priorities for presentation to the Board.

The presentation will start with a synopsis of the most salient background information on technological, demographics, globalization and State and Federal support to set a context for the information to come forward. The presentation will represent the work of all the people involved in the process and will place the ideas into strategic objectives for the Board's consideration.

The vision and mission generated through segments one to four and the charrette process will be presented to the Board. Once there is consensus on these, the discussion will turn to the strategic goals identified through the process. There will be no more than ten strategic goals presented.

Each strategic goal will be posed as a functional or tactical objective. That is, the objectives will be put into active language with a statement of the need or objective followed by an action statement of implementing to the goal. The deliverable will be a viable and manageable set of functional goals that can be both qualified and quantified.

For example, should the charrette indicate that one of the goals should be to increase enrollment, the objective might be written as Increase freshman admissions of qualified students at the State University of Iowa by increasing applications by 8% by 2018 by using the Common Application by 2017 and increasing in high school visits by 18% by 2017. The use of functional goals not only sets in place quantifiable and qualifiable objectives but also establishes a timeline by which each shall be accomplished. From these dates, an implementation plan will be generated and presented to the Board.

The presentation will allow time for discussion during the presentation and for as long after the direct presentation as the Board requests.

### **Generating the Strategic Plan Document**

Following the Board presentation and discussion, NRaisman & Associates will create a printed document to present the Board's Strategic Plan to the public. The document will come to the Board for final approval prior to release to assure it represents the Board of Regents.

Photographs of the colleges and communities will be provided by the colleges themselves. All other relevant illustrations or pictures will be developed by NRaisman & Associates.

### **Communication of Progress to the Board**

Following each of the segments of this proposed process, NRaisman & Associates will provide the Board Chair with a report of the progress toward the goals of the project.

### **Communication Plan**

To assure that the System's constituencies are kept abreast of the progress of the process the following communication plan will be implemented:

After the Board accepts each progress report, a summary of that report will be communicated to each college using electronic media and a Strategic Planning webpage. The webpage will be created by NRaisman & Associates and will include regular updates

of progress such as who was interviewed by the date of the entry and updates of general progress.

Additionally, when any document comes out of the process such as the Charrette Background Booklet, with the approval of the Board, copies will be placed in each campus library or common area so the college's community can receive direct information from and for the process. The locations of the Booklets will be made available on the webpage as well.

**The project will begin as soon as the RFP is awarded and take three months to present a strategic plan presentation to the Board of Regents for its approval.**

**Fee for Project**

\$84,000 56 consulting days @ \$1,500 a day  
plus expenses for travel, lodging, food, and car rental  
1,818 charrette lunch and materials  
72 materials such as paper, printing  
**\$85,890 TOTAL COST excluding expenses**

## Neal Raisman, PhD

Dr. Neal Raisman is the founder of NRaisman and Associates and has assisted over 400 colleges and universities plan and implement a stronger future through identifying strategies and goals for the institution. His work has been with major public and private universities as well as smaller yet equally important ones in the United States, Canada and Europe. He has also led and completed strategies studies to set goals for community colleges.

Dr. Raisman developed what is now recognized as the campus field audit in which every aspect of an university or college is studied to determine how that institution could enroll and retain more students as well as increase the bottom line. In an audit, Nraisman & Associates study every aspect of the institution's operations from recruitment through to graduation to develop new strategies and quantifiable goals unique to that college's needs, culture and future.

Raisman is also the leading authority and consultant on customer service and retention in higher education. Dr. Raisman's best selling books such as [The Power Of Retention: More Customer Service In Higher Education](#) have been purchased by 63% of all colleges in the US. His latest book is [From Admissions to Graduation: Increasing Growth through Collegiate Customer Service](#). His customer service and retention blog [www.academicmaps.blogspot.com](http://www.academicmaps.blogspot.com) with its discussions of recent research and solutions to customer service issues is very popular and read by over 2,000 colleges, universities and business that work with academia each week

His 36 years as a faculty member, dean, associate provost, president, and chancellor of public, private and for-profit colleges and universities has provided him the understanding of academia to make him at least bi-lingual. He speaks English and academic-ese. And his years as a stand-up make his writing always fun to read and his presentations entertaining as well as educational. He speaks our language and understands the unique nature of colleges and universities with their individual cultures and missions and that they are indeed businesses at some level.

His work in customer service began in 1999 when hired to figure out why a large multi-campus college was losing students. The answer he found was customer service. Not the customer service of the corporate world but of the academic enterprise where the customer can be wrong – especially on quizzes and tests. Since then, Dr. Raisman has worked with over 500 colleges in the States, Canada and Europe to research and solve customer service issues. He also works with corporations and businesses that wish to better understand the higher ed market and students.

He has a PhD from the University of Massachusetts in Amherst in neurolinguistics, was a Fulbright Fellow in France; has published six books, over 300 articles and writes the blog [www.academicmaps.blogspot.com](http://www.academicmaps.blogspot.com); won numerous awards for academic and strategic planning.

## Marylin Newell, PhD

Dr. Marylin Newell is a Senior Consultant with Nraisman & Associates as well as the founder of College Matters, a consulting practice that partners with colleges and universities to improve key metrics, attain and maintain accreditation, and improve the overall quality of the educational experience for students, staff, and faculty. Marylin partners with administrators, owners, and governing boards to guide them in achieving their desired results in academics, student services, enrollment management, accreditation, and executive management. With 27 years in higher education, she is an experienced administrator with a track record of developing existing managers into a high-performing management teams that achieve turnaround financial results.

Marylin began her career in higher education as an adjunct faculty member. Shortly after moving into a full-time faculty role, she became Campus Director/Academic Dean and later Vice President of Academics in that first college. Five years later, she took her first of two college presidencies at colleges in Maine and New Hampshire. During that time she served as an accreditation review team member with ACICS and NEASC and a commissioner with NEASC's post-secondary commissions on Technical and Career Institutions and Institutions of Higher Education.

By building strong management teams, she led schools through national (ACICS) and regional (NEASC) reaccreditation, increased new student enrollment by as much as 20% over a 4 year span of time and student retention by 8.5% in a 2 year period. During her first presidency, the school saw overall financial performance improvement ranging from a 12% EBITA margin improvement in year 1 to achieving the owner's goal of successfully positioning the school for acquisition by a major corporation over 3 years.

Her focus throughout her career has always been to improve the overall college experience for both students and employees through a focus on customer service. In addition to her own consulting work, Marylin assists Dr. Neal Raisman, author of *Embrace the Oxymoron: Customer Service in Higher Education*, *The Power of Retention*, *Customer Service Factors and the Cost of Attrition*, and *From Admissions to Graduation: Achieving Growth through Academic Customer Service* to conduct Field Service Audits at colleges and Universities around the country to identify customer service strengths and opportunities for improvement and provide cost-effective solutions to improve service quality.

With a Masters degree in Adult Education from the University of Southern Maine (1995) and a PhD in Organization and Management from Capella University (2010), she has a unique appreciation of the benefits of focusing on key metrics in both the academic and business aspects of higher education.

William E. Berry, Jr.

**William E. Berry, Jr.** distinguished himself at several post-secondary institutions in his thirty plus years in higher education administration. From director of a multi-campus national institution to the vice presidency of a two-campus college, Mr. Berry charted paths and developed workable initiatives in strategic planning and institutional sustainability.

As an assistant dean at SUNY Stony Brook he initiated enrollment management strategies that increased minority student enrollment and graduation rates in the Educational Opportunity Program, as well as general admissions. .

At Malcolm-King College Bill developed two plus two programs when direct access to a four year institution from a two-year college was difficult. He developed institutional funding for a Student Life program that valued the totality of the college experience and developed strategies to show how student affairs issues enhanced and complemented academic success via retention and graduation.

At Rockland Community College (1990-1997) he provided analysis and support in the college's ten year planning and strategic goal setting process. He provided statistical analyses to document the institution's lack of progress in recruiting students and faculty of color; worked with the campus community to develop accountable measures to change that situation with annual progress reports as part of a short-range five-year plan; revised affirmative action practices that transitioned to equity issues of class, bi-racial background, sexual orientation in addition to the traditional cohorts of inclusion. He also secured grants that enabled him to work with and train faculty in diversity and pluralism strategies that led to several discipline-based courses in diversity that all students needed to take to graduate.

These experiences culminated for Bill when he served in the senior position as dean of planning and institutional initiatives at Cayuga Community College. At CCC, he solidified the status of an off-campus program in another County that eventually became a SUNY sanctioned recognized campus with independent programs of study. He led a three year process of institutional planning that led to the College's first strategic planning process. He worked with County, City, local faculty and NASA officials to start a GIS undergraduate degree and construct a Regional Applications Center research facility by identifying and securing \$10 million in funding; wrote, secured, and managed an additional \$1,298,512 in grants for a variety of specific campus programs, and developed a process for seamless learning and transition from middle school to enrollment at CCC and guaranteed admission to a private four year private College.

As an associate dean and executive assistant to the president at a CUNY four year college (2001-03,) Dean Berry led a planning process that led to an emergency evacuation plans and campus based shelter procedures in the age of 9/11; strengthened ties to community and borough based organizations; enhanced the participation and partnerships between the college and the Queens Magnet High Schools; provided executive level assistance in the

organization of the charter year of the Queens High School of Science at York College; refocused the direction and scope of the Women's Center to provide more student services critically aligned with curricular offerings, and assisted in the development of the College's first Masters Degree program (Occupational Therapy,) and the organizational start-up of the York College Aviation Institute.

At Briarcliff College, Berry became a Certified Trainer via Diversity Done Right, Long Island Network of Community Services (LINCS;) created and staffed an Office of Student Life; initiated and provided oversight of a student leadership workshop series; re-instituted student government; published the College's first student newspaper. Assisted in the development and then directed the College's first dormitory housing initiative.. He also worked with the president to halt increased attrition rates; achieved annual retention goals; transitioned intercollegiate athletics towards formal involvement with NCAA Division II status and participation, and reorganized student services into a goal-oriented, retention focused, and advisement based student delivery system.

# **N.Raisman**

## **&ASSOCIATES**

86 N. Cassady Ave. Ste 18  
Bexley, OH 43209



**Report from**

### **Customer Service Audit of the University of Toledo**

**Prepared by:**  
**Neal A Raisman**  
**President, N.Raisman & Associates**

**December 7, 2011**

## **Introduction**

Beginning on November 9, 2011, and continuing through to the writing of this report, N. Raisman & Associates conducted a customer service audit of the University of Toledo. The audit included examines the service efficiency and effectiveness of the University telephone, email, and web services all of which will be discussed below. The audit also included an on-site academic shopping study conducted from November 9-17 that included campus observations, mystery shopping, interviews with staff and students and focus groups as well as a review of assorted documents found on the campuses and the University website. The shopping was done by two of N. Raisman & Associates most senior investigators who played the role of potential and current students. The customer service investigation was accomplished by testing the actual services through meetings/interviews with 272 randomly selected students and 54 employees.

The audit was also informed by the use of a survey administered randomly to students. This survey (attached) was used to gauge the experiences of students with various offices throughout the University. It focused on the offices themselves and the services provided there as well as the way that the people in these offices acted toward the students. Seventy-four surveys were completed by students.

Overall, the audit revealed the University has some definite strengths and several areas of opportunity to improve customer service. Specifically, when students were asked their overall satisfaction with The University, approximately 90% indicated they were quite satisfied with the University and happy to be there. However, this did not preclude them having issues, complaints, or suggestions for improving the University's services to them. Still, they were generally satisfied with the school. The study sample was a randomly selected convenience sample comprised of students who are still at the University. It did not include students who had left which may have altered the satisfaction quotient. Augmenting the students' assessment, staff reported that although the University has made some progress in the past year and is getting better, there are some definite customer service issues as well as issues of dealing with rapid change which may not be as well vetted, integrated and trained for as staff would like.

It is important to establish the strength of the institution early in the report since it is the nature of a customer service audit to disclose problem areas and thus focus on negative situations that need attention. The general results of the audit to date reveal an excellent University with some extremely dedicated faculty, staff, and administrators providing an outstanding academic education. Several students named specific staff or faculty who contributed to a positive experience. Others reported that when the systems for managing student transactions worked, the staff who served them were knowledgeable and able to help them resolve their concerns. However, not all students agreed that the service delivery systems worked as the University intended or as they would hope. In fact, the audit disclosed there are some issues that need to be addressed to improve customer service at the University. Again, it is important to stress that the student population

interviewed were currently enrolled students not those who have already dropped out; however, the frustrations of the students interviewed seem to be such that they both could contribute to current students' leaving and might have been contributing factors for those who have already left.

The customer service audit report will identify a number of factors that may be impeding the University's further excellence and impacting student retention.

In general, many University employees appear to be able to deliver an acceptable to good, even excellent level of customer service. Some others—especially in areas which appeared to be somewhat less than adequately staffed—were reported as being indifferent, brusque, and even rude. Many members of the University community exhibited a pleasant, welcoming demeanor, though others displayed indifference or even disregard. A major contributor to student dissatisfaction appeared to be systemic rather than personnel-related, and this report will address those systemic concerns and provide suggestions for improving the quality of customer service that will result from the implementation of changes to those systems.

It is the nature of this type of report to focus on the areas for improvement more than on the areas in which the institution excels. We found many bright spots at UT. We certainly noted was a significantly high student satisfaction rate. Although there were quickly identified areas for improvement, students generally are quite satisfied with their UT experience. Although in many cases the students also pointed out things about the following transactions that could be further improved upon many students identified the following as areas (listed in random order) that work well:

- If one looks lost in Rocket Hall someone will almost always offer help;
- Registration is easy, simple;
- The class schedule is consistent making it easy to schedule back-to-back classes;
- The two day schedule is good;
- Improvements in the neighborhood around Rocket Hall have made the neighborhood more appealing and feel safer;
- The website has very good information, but often difficult to locate and/or inconsistent information;
- Campus has designated smoking areas; although in one dorm, students complained that there was no control over tobacco use;
- Students say the rec center is “awesome”;
- Some vending machines in Park Tower and the field house have swipes which is a good idea;
- Being able to complete some forms online is a plus (e.g. health insurance waiver, parent plus loan paperwork);
- Orientation was useful, but too long;
- Some professors are great;
- Bills are easy to access;
- Many offices are thorough and efficient;
- People seem to be more than willing to help;
- Night Watch is great and helps students feel safe on campus;

- Library services, interlibrary loan and librarians are “top notch”;
- UT is a nice, clean, well maintained campus although there were others who complained about trash, cigarette butts, and vomit around trashcans on campus;
- Student ambassadors available during the first week were helpful, although there was a great diversity of opinion about how long and when they were available;
- Diversity on campus is a real plus and people get along

## **Why Students Leave a University**

There are three major categories of initiators for students to leave school. All of these relate to whether or not a student believes s/he is getting a good financial, emotional and affective return on his/her investment. These initiators correlate directly with a student’s assessment of whether or not the school is worth the investment of money/time; the student feeling he or she is or is not valued by the school; or a student believing his or her sense of importance is not returned by the school in its services as seen in the statement “I get poor service and help” which is a comment made by some of the students interviewed during the site visit especially about the Rocket Solution Center.

The next most common initiator is when students are not able to cover the cost of school. However we have found that if a student feels he or she is getting the full return on the investment the student will find some way to pay for it. It is significant that 54% the students at the University commented on the costs of going to school and the recent increases in tuition and fees. This is a worrying sign to us and indicates that the students are more consumer-oriented than other schools we have worked at and that they will be demanding higher levels of customer service in return for the increased costs of attendance.. Other initiators include poor grades, a belief that the education experience and/or quality of training is weak, and actual personal reasons.

These initiators can be further divided into strong shocks, insults and accumulations. In their article “A Detection Model of University Withdrawal” on why some students drop out of universities, Timothy J. Plaskac et al (2011) posit the idea of shocks, events or actions so strong as to cause a jolt to a student enough to make him or her drop out of school as a major contributors to the decision to leave school. Though they do not define a shock they list examples that they found as causes for their study group to say they might leave University (p. 7). Their list includes major events in the life of the student that can be divided into four categories of strong shocks.

1. Physical shocks - assault, pregnancy, illness, addiction;
2. Self-value shocks - unexpected bad grade, conflict with faculty member or roommate;
3. Life shocks- death in the family, marriage, lost job paying for school, came into a large sum of money, received a job offer and
4. Service shocks - lost financial aid, large increase in tuition and fees.

The category of shock is flexible depending on how the shock affects the individual and how it affects his or her sense of self. For example what could be a physical shock such as an assault or robbery could affect an individual as a shock to the self-value the individual

holds for him or herself. An assault on a person could lower one's self-esteem for example rather than cause a person to be fearful of the environment an almost certain cause of a student dropping out of school. A shock to one person may also not be a jolt to the system for another. A large increase in tuition and fees for a person who feels that the University is worth the cost because it will lead to a valid return on investment might not find the increase all that much of a jolt. Another student who does not see the value to the education and training leading to a job goal could find that increase to be a sufficient enough shock to quit school.

A strong shock such as class cancellations in the week before classes start or not being able to get into a course that is needed to continue the education—an issue reported by many students due to the difficulty and/or poor advising available to them in some of UTs - will be enough for a student to drop out or at least stop out. At the University we did hear about students being ill-advised into courses they did not need and thus needing to take additional courses that extended their stay by at least a semester and more for some. We also heard of classes being canceled in the week before classes started. This disrupts the student's planning schedule and sense of place. This is a particularly strong shock for commuting and adult students because in most every case a student has determined his or her life around the original schedule and the location of the selected campus. A certain expectation has been set which, when unmet, causes upset for the student.

The following is an example of how this affects the population of the University. The student, a single mother, has registered, been told the schedule she chose is hers, and built her life around that schedule. She has, for example, gotten her work schedule adjusted so she can attend classes and lined up babysitters for the hours of the classes. Then in the last week or even worse, just days before that start of the semester, the University lets her know a class has been cancelled. If she can get that class at all, it will be on another day or time than she had originally scheduled for. This is a shock. All her plans have been disrupted. If she cannot or has problems re-arranging her schedule, the shock remains strong. The student is likely to drop out or at least stop out which easily can become a drop. If she is able to rearrange her life to accommodate the school, the shock can become an insult but it has started her on the pathway out.

An insult—which is the most common category we discovered at University—is also a jolt but to the ego primarily and often comes in the form of poor service that leaves an issue unresolved or poorly handled. For example if a student tries to get help for an exam but is rebuffed by the faculty member, or an advisor refuses to help solve a problem without an appointment and that appointment is weeks away, this is a definite insult. It could be that a student's registration and courses are lost because of a block which may or may not be appropriate and the student has to start all over just before classes start or have started. These are felt as personal rejections or insults. A single insult in and of itself might not be enough to cause a student to drop out, but if they accumulate they can become sufficient to lead to attrition.

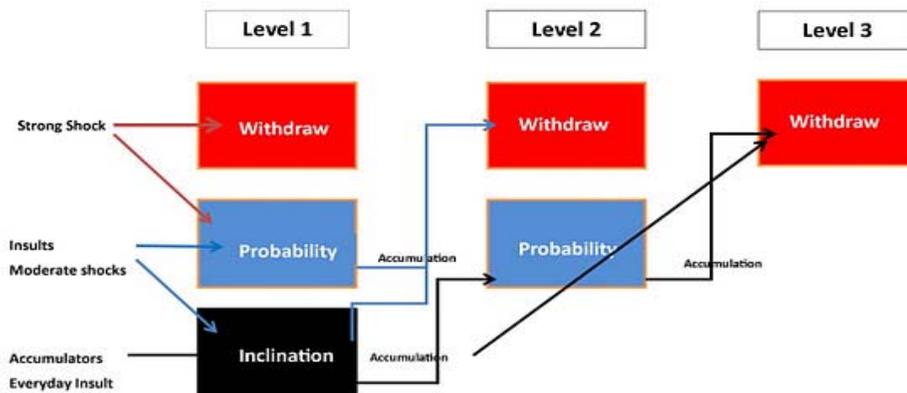
Both shocks and insults are fungible within category depending on the individual, although shocks tend to be strong enough to be consistent for all individuals. But what might be a strong shock for some such as a physical change such as pregnancy or illness in

an individual might just be a challenge for one which will not initiate a drop while for another a weaker shock such as a broken limb might be enough to initiate a drop. An illness in the family could cause some students to leave while others will or can shake it off and maintain their studies. The strength of a shock or insult thus must be seen in relation to the strength of the individual as well as the narcissism and/or marginalism of the student.

The accumulative category is just what it says it is. There are enough instances of poor service, long waits for appointments or walk-in service, phones not answered, rejection, mild insults, lack of assistance, lost paperwork, disappointments, etc., occur to exceed an individual's threshold. The student will drop out. One too many times, a student is ignored while standing at a counter, has to stand in lines at the Solution Center, experiences showers that do not work well and hot water is not available for a shower in the dorm, can't find a convenient parking spot, is not greeted with a smile and offer of assistance, sends emails or leaves voice mails that are not returned, shows up for appointment times that are not kept by staff, and so on, and these experiences build and do push students to leave.

Among the insults reported by the University students interviewed were the shuffle, lack of call return, paperwork not done, non-responsiveness, looks, rebuff, poor signage, missed appointments poor reception, having to wait to see someone, lines, lack of help when needed, poor phone use, problems not resolved, made to feel unimportant, lack of greetings, feeling of not belonging, some faculty just rushing through power points, and more.

The following chart represents the withdrawal potential of strong shocks, insults, and accumulators:



**The Progressions of Withdrawal from College**

The three categories of initiators create pathways out of the University and increase in strength during certain periods on campus or off. The first week of classes is a notoriously significant time for the creation of a pathway out as students are new to the school, have high expectations and low real affective relationship. Moreover, students at the University report this is a time when the lines snake down the corridors and waits are interminable. Students do not know their way around physically which can be a real challenge as students try to find their way from classes to various administrative buildings and can easily get lost on campus since there is inadequate on-campus signage. As a result, they are often late to class. These are definite accumulators.

They may also find that books required for the courses are not available or sold out in the bookstores. In any case they will almost always exceed cost expectations. The complaint that books are too expensive was pervasive. Financial aid often comes in late for many students and then when it does arrive, it is less than the estimators calculated. Or even worse students are told that their financial aid is not coming in and they will be dropped, but it finally does show up and the students are thus held accountable for costs after they were told they were dropped and they stopped attending. Moreover, they may be told that all their bills are paid only to find that the parking fee is added later, and they are not aware of the new charge leading to inordinately high later fees which they do not know they have to pay yet and are blocked from even using their Rocket card to get into their dorms or buy food. Students may become involved in the almost assured search for a parking spot and are late to class; take too long to find a space and miss class or just give up and go home. These first week occurrences may seem like old hat to seasoned students but to new first term freshmen they almost always become insults; not accumulators. They will lead to a student determining in the first weeks that this will not be worth their time/money, emotional output and need to belong and unless something happens that

student will drop out. When the issues continue as they often do at the University, they accumulate and become initiators to leaving the University.

Moreover, it is almost as if the University was challenging new students to get lost on campus and learn their way around to prove they belong here. Sort of a rite de passage that has replaced freshman hazing in which students need to pass to be considered appropriate University material.

There are numerous other insults that become accumulators at the University as will be discussed in the report. These may seem small but they do accumulate and lead students to drop out. The rest of the report will attend to them as well as provide solutions when possible to solve them and in so doing, increase the levels of customer service.

### **A University in a Service Transition**

A primary area of concern seems to stem from the University being in a transition in its customer service delivery model. It appears that following a less than stellar experience a year ago when the academic year was beginning, the University has begun some very assertive customer service initiatives and programs to assure that there will not be a service break down again. The University appears to be moving from a direct person-to-person customer service approach to an online and/or person augmented online service model. It is unclear whether this shift to the online service model prompted a reduction in the workforce or a reduction in staff prompted the move to online service delivery. It is clear from the comments and service levels we disclosed that there has been a reduction in force that has had some negative effects in service delivery even if these effects are in the minds and attitudes of some employees.

Students are being driven to the web to perform more and more of the services themselves which seems to be working in some areas such as registering for courses. Students did indicate that they may even be willing to be more individually involved in taking care of their needs for service in an online environment and many of the service actions that would have been done in a person-to-person environment appear to have been embedded in the University's website; however, the effectiveness of that site to provide a high quality of customer service is questionable. We will expand on this later in the report. The belief that students wish to take care of their own services online may have some validity, but it also may not be representative of many of the University's students who are from environments that may not be as computer savvy as the University expects or wishes. When making the decision to rely heavily on technology, it is important to consider the demographics of the population being served. In the case of the University, it is likely that there are students who come from families with no computer in the home or from schools that may not have been rich in technology. This was something we did hear from some students. The University's mix of programs of study of associate degree and bachelor degree programs and its history as a community University with open enrollment policy likely attracts some underprepared population. This population typically has a larger than average number of first-from-family-in-University and international students; many who are also remedial and/or ESL students entering through

the Gateway program. Students from these backgrounds may have greater problems navigating not just the online environment but the University itself. They require more person-to-person interaction to effectively understand and navigate the administrative requirements related to the University experience.

There also appears to be a segment of the student population which simply prefer person-to-person contact and will avoid the online self-service environment. Many of these will be from the populations mentioned above. Some will represent adult students who have not grown up in an online environment and do not know how to navigate (or prefer to avoid) the online services. Finally it needs to be said that the online services themselves are handicapped by the website itself. From the user's perspective, the pages that make up the website are not intuitive and not set up for easy navigation. The search function in particular does not work well at all and frustrates many students seeking to work on the website and on myUT. Although an attractive site from a visual/design perspective, the information available on the University's website has many layers making finding specific information needed to complete transactions difficult. For those who are not computer savvy, the website is simply very challenging to use effectively.

It was noted earlier that staffing levels may have prompted the move to online services, or the move to online services may have prompted the reduction in the workforce. In either case the staffing levels observed during the audit is also a concern. In individual meetings and focus groups with staff, the reduction in force came up each time as well as the speed and what they saw as random implementation of new customer service technologies to replace staff. Staff felt that there was a great deal of money being invested into new but untried and unvetted technologies that were just being imposed on them without their involvement or at times even prior notification. The level of frustration among the staff was palpable. Of particular concern was the speed at which things were changing at least as much as people losing their jobs. They simply did not feel that they had enough time to adjust to changes and were afraid that if they did not adjust they could be replaced.

This leads to a certain level of resistance and distrust of the new technologies to provide service which in turn leads to a lowered morale among the staff which will cause a diminution of service quality. People who feel they are not being consulted on changes in their area and who are at least somewhat fearful about keeping a job do have lower morale and that will play out in their interactions with students. Moreover, the staff and faculty on the University academic campus are suspicious of the medical campus and have not yet assimilated the merger into their views on the entire University. They are suspicious of initiatives coming from what they see as "the medical side" and feel that the President who was from the medical school does not understand or care about the academic process or culture. This makes some of the service initiative suspect and resisted. This will be the situation for the rollout of the iCARE University program difficult if it is perceived as growing out of medical school initiatives. It will be important that whoever leads this initiative finally is seen as "one of us"; an academic-oriented person. Moreover, it is suggested that the office of the director of all the customer service initiatives have his office moved to the academic campus as well to start making the initiatives appear to be originating on the academic campus and not being imposed from

the medical school. Simply put, it is our observation that the merger has not yet fully created a blended identity for the University and that will cause issues for future initiatives if they are perceived as not coming from within the academic campus.

The overall transition may actually be a constant factor in the evolution of customer service at the University. As the University continues to move more of its services online, we believe there is also a significant segment of the population which may be resisting the online environment. It is our observation that there is a diminution of the quality of customer service delivered to students not necessarily because of the behaviors of staff who deliver the services, but more likely because of the ineffectiveness of the system. Some staff members expressed their own frustration with not being able to assist students/visitors except to direct them to the online services. This may be an institutional directive or it may be an individual interpretation.

With that said, it is important to make note that the possibility exists that there simply are not enough staff available for the size of the population. In our experience, long waits to see a person averaging thirteen minutes at the Rocket Solution Center on an average day are most likely causing students to become dissatisfied. Dissatisfaction is a contributing factor in student attrition. Students must be made to feel their needs are being addressed in a timely and effective manner, or they will become disillusioned and potential drop outs. The incidence of students who walk away or try unsuccessfully to call in to get help is a clear indicator of customer dissatisfaction. Limiting the staffing levels may appear to be saving money, however, this could be counter-productive, especially if it is leading to increases in attrition. Factor into this that the students do not always get satisfactory service when they see a person and the long wait plus desultory service. When those occur surely add to the drop rate.

Another way current staffing levels may be adding to student dissatisfaction and correlating attrition and/or non-enrollment is evidenced in the fact that people do not answer ringing telephones. They do not always respond to voice mails, and do not answer emails from students in a timely fashion or at all in some cases. When we tested the telephone protocols, we made 60 calls to various service offices such as admissions, registration, counseling/advising, and financial aid and the ringing phones were only answered twenty-five times; four of them being in admissions and once the Rocket Solution Center. We left 35 voice messages and five were returned.

### **Admissions**

The Admissions Office provided good to excellent customer service. The receptionist responded quickly when anyone entered their area in Rocket Hall and welcomed the person to the admissions area. She had the person sign in and then discovered what the person was there for. Following that she directed the person to complete an information form and then made arrangements to see an admissions counselor for an interview and having any questions answered. The only drawback was that the potential student had to wait seven minutes before finally seeing a counselor which seemed a bit excessive without any other potential students already seeing the counselors.

The potential new student met with a counselor named Joy who provided a very good overview of the process, gave out some very helpful papers in a well-organized folder which contained information on majors, residence life, tuition and a view book. She also provided a map of Rocket Hall and the University plus an application guideline and application itself. The packet also had a sheet on how to apply for FAFSA which should be available at the Rocket Solution Center as well as information on scholarships and awards which should also be at the Solution Center but are not. The FAFSA form however should also have the deadlines for filing for FAFSA for the most immediately upcoming term as well as the University college code to make it most helpful. One of the customer service errors made on the FAFSA form is not listing UT codes when people are trying to complete the form on-line they are unable to do so and often abandon the form simply because they do not have UT code. At the very least they may attempt to contact the University and since they do not know who to call, they are often frustrated as they are passed from office to office as we were when we inquired on the code only to finally get to the Rocket Solution Center where the line was busy. We did leave a request for a callback twice and one was returned.

The counselor spent fifteen minutes and answered all questions. Upon being asked about adult students attending the University, she called to UT of Adult and Lifelong Learning to see if the potential student could meet with the representative there. She was at first rebuffed because the potential student indicated that he would want to study business and as it turned out, UT only wanted to meet with people who would enter their programs; not business. But the admissions counselor cleverly said that the potential student wanted to learn about credit for prior learning which UT does cover and an immediate appointment was set .

Joy next did a very important customer service function. Rather than just direct the potential student down the hall to UT of Adult and Lifelong Learning, she got up from her desk and walked him down. Upon arriving at UT, she sought out the person she had spoken to on the phone, made introductions and then left the potential student with the person from UT. This is the way it should be done and all personnel should be taught how to do this sort of handoff whenever possible.

Another auditor posing as a parent interested in information for a 23 year old son, was greeted by Shawn Bussell immediately on entering the office. Polite and helpful, he asked whether the son was still in high school or had graduated already. He then provided a view book with adequate information about programs of study, residence life and tuition, an undergraduate admissions application, transfer guide, and information on scholarships and awards.

Responding to a question about arranging for a campus tour, he referred the auditor to a section in the booklet with directions about setting an appointment online for a tour and added that campus visits are scheduled Monday through Saturday and begin with a presentation at 9:00 a.m. followed by a tour, lunch, and program overviews. When it was mentioned that we were relocating to this area and asked about the residency requirements, Shawn printed a 4-page document titled Residency Rules & Exceptions. He asked if the son had gone to any other college and when told yes, he mentioned the possibility of transfer credits.

The auditor then asked if there was a resource that could provide career counseling, and learned there was a Quest Program for students undecided in their major that would work with the son to identify his interests/skills and possible career options once he had applied to UT. When

asked if there was time to get all the paperwork done before the next semester began, and was assured that if we were diligent we could have that all taken care of. He recommended that we file our FAFSA as soon as possible to ensure timeliness in that area and provided me with a FAFSA Tips sheet. What is missing from the Tip Sheet is the school number and the school's deadline (if there is one). Additionally, the form should be edited to push the heading *Submit Your Application* from the bottom of page 1 to the top of page 2.

Finally, Shawn offered his business card in case there were questions; however, he discovered there were none of his cards in the box at the front desk. He quickly improvised by writing his contact information (email, phone, and UT's address) on my notes. Later in the day when the auditor was in the Student Union meeting with students and Shawn walked through, spotted me and waved. Shawn should be commended for his attention to detail and thoroughness and for recognizing and acknowledging me later in the day.

Interviews with students affirmed the positive experience with the admissions office staff which students reported were friendly, helpful, and made applying to college easy. One student summarized her experience with the admissions process as “smooth, quick, and easy”.

The only failure in admissions was that neither auditor was offered a parking pass to make sure that they would not receive a ticket for parking in the Rocket Hall lot which has no parking spots for visitors to admissions. This is in itself a grievous customer service error. There should be spots reserved for visitors to the Hall and especially for those who are trying to see admissions. We recommend that visitor spots be created in an easily accessible location perhaps along the sidewalk and that they be monitored for visitors only. Of course to make this work, admissions will have to be vigilant in offering visitor tags or slips to be put on the dashboards of those coming to see admissions. Otherwise they will fill up with regular parkers who will take any spot they can since there is such a strong parking problem on campus.

### **UT of Adult and Lifelong Learning**

This is a misnomer. UT is not for adults but for adults who are enrolled in one of their two programs. If an adult student is not enrolled in an individualized degree or an adult liberal studies degree they are refused help by UT of Adult and Lifelong Learning. The admissions counselor had to use a ruse to get our auditor in to see a person under the guise of lifelong learning credit even though he wanted to just find out what it is like for an adult to go to school at the University. When the auditor was received the gentleman helping him was helpful, but if this is a college for adult learners, there should not have been hesitation to see an adult learner.



The gentleman who was providing help to the auditor also took a phone call while talking to the auditor. This should not have been done. What should have occurred was to let the phone go to voicemail and the person could have been called back later. Or at the very least the phone could have been answered, the name and number of the caller obtained and the call returned later. The person should not have been ignoring the person in the office to take a call that interrupted the conversation.

When the auditor asked about programs outside of UT, he was told to look on the website for that information. When asked if he could show me how to do that he did but had some difficulty finding the exact program as he mumbled that the web can be a bit difficult to use. And he did have trouble getting to the page we wanted but he persevered and got it and printed it out.

### **SOLUTION FOR UT OF ADULT AND LIFELONG LEARNING**

If it is to retain that title it should be open to all adult learners accepted to the University and not just those enrolled in one of their two programs. Adult learners are a unique population and can bring unique issues with them. Thus they need a place where they can go to get assistance that is specific to their needs. This should be the location or UT should change its name so it is not misleading.

If this is not to be the location for adult learners then another area and staff should be made available to adult learners specifically so they know where they can go to have their issues resolved and responded to. Moreover, this office needs to be open in the evenings since most adult students are night class attendees. Having an office for adult students that is closed when they are on campus is not productive nor does it provide good customer service to the population it will claim to serve.

### **Rocket Solution Central**

The Rocket Solution central is a paradox. It is capable of doing what it is supposed to do

but is also not as capable of delivering good customer service as most students would want. There are a few issues that are keeping Rocket Solution Central from being able to deliver on its service promise.



The first major problem for the RSC is that it is not well understood across campus as people believe it is what its name implies – a central place to solve all problems for students. It is not. The RSC is set up to take care of front-line financial aid, registration and billing issues primarily but the campus has somehow developed an understanding that it is there to solve all problems that students have. And the students also believe that they should be able to take care of all issues there as well. It has become a “dumping ground for problems” as one member of the RSC group stated.

The result is that people on campus send all sorts of problems to the Rocket Solution Central which do not belong there. Students then arrive at the RSC believing their issue will be resolved and are put off when they learn they need to go to another location and office to resolve the issue. When they go to the other office they are often told that they can get a solution at the Rocket Solution Central office and are sent back to the RSC. Once back at the RSC, they are again told that the solution lies elsewhere. As a result, students feel they are getting the run around. They are but it is not necessarily the fault of Rocket Solution Central. Still, the RSC will be the one blamed for the problem because of the perception that it is supposed to resolve all problems.

An example was observed during the audit. During an observation at the Rocket Solution Center, there was an exchange happening at the service counter between two of the RSC staff

and the mother of a student in which the mother appeared to be frustrated at not getting the answer she sought. I decided to occupy myself filling out a request for transcript form and continue to observe the conversation. The son had been enrolled in Chemical Engineering, but the mother contended the son had been misadvised and subsequently had either withdrawn or changed majors. She was looking for a refund of some sort. The staff person told her she needed to contact the dean of UT of Engineering and have UT change her son's status in order for the RSC to process the refund. The other was frustrated and demanding, and began sharing a lot of personal information about her relationship with her son and her husband. Although the staff members tried to repeat that they were more than willing to process the credit/refund request and attempted to send the woman back to UT for them to do their part, the woman persisted. The staff were patient, tried to empathize with the mother and continued to try to explain what she needed to do. It might have been better to manage this situation by calling the Dean of the Engineering School or his/her assistant and handing the phone to the customer so she could request the change of status without having to go across campus—although I suspect there is probably a form that would need to be completed by the student for this transaction; however, that form could have been emailed to the RSC staff member to print out and give to the parent to complete. Also, given the nature of the request and the rising frustration of the mother in this exchange, it might have been more appropriate for the staff person to invite the customer into a private space when it became clear how insistent the mother was getting. Affording the customer a private space for what became a delicate conversation would have made the customer and the other visitors to that area more comfortable.

The further result is that Rocket Solution Central is one of the most negatively considered service areas on campus by the students. In fact, during interviews with students 85% mentioned Rocket Solution Central and not in a good way. Typically, if students did mention the RSC during the interview, they had a complaint. Of the many students interviewed, only 5 said the help in the RSC was good and efficient or that their experience with the RSC had been positive. More than a few students said there simply were not enough people in the RSC to serve students during peak times. In our own experience, we waited over 7 minutes in the RSC while the staff there waited on other customers. A couple of students identified that the most difficult time to reach someone in RSC occurred during the summer months as the September term was approaching.

Students were invariably critical of the Center for not solving problems and sending them on the shuffle from one office to another as in the example above. The client would be made to leave RSC and go to another location which could very well send her back.

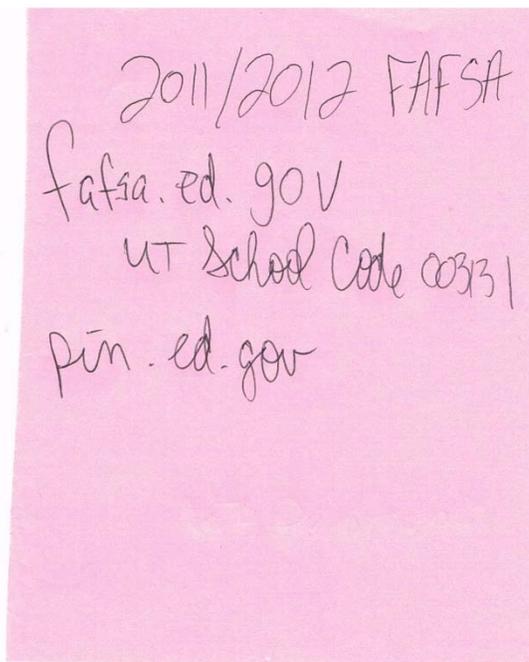
This is not to say that Rocket Solution central is not without fault however. In fact, we found quite a few complaints from students some of which were substantiated by our own experiences. These issues include:

- Long waits up to an hour and more especially during peak periods at the start of semesters
- Waits of an average of eight minutes to see a RSC person on a quiet day
- Issues not resolved
- Phone calls not answered, not returned or placed on hold for long periods of time
- Staff can be abrupt and rude

- Information given out is often incomplete or inaccurate

In one experience testing the Rocket Solution central service, an auditor approached the Center desk and was quickly told he had to take a number. He took a number and had to wait eight minutes to see a counselor even though the counselor could have called him forward after he finished working with another client. The counselor waited three extra minutes between clients and that unnecessarily added to the wait. These three minutes of waiting and watching the counselor just seem to sit there added to the frustration of the wait.

When the auditor finally did get called, he asked about how to apply for financial aid. Rather than explain the process or provide a how-to sheet, the counselor quickly jotted some scrap paper and wrote out the FAFSA website information with no explanation.



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Moreover the counselor was too abrupt and did not try to really help the person requesting the information. As soon as he had written out the jottings on the scrap paper he called the next number leaving the auditor without the needed and requested information or an opportunity to get more information. This sort of treatment was reported on by students many, many times. They were rather specific on saying that there are some "good and helpful people there but there are a few that are just mean and uncaring." Students also observed that there is one male counselor there that is almost always unhelpful and even rude. It must have been our experience to have encountered this gentleman in this instance. It was the experience of the auditor that there was a basis for the student dissatisfaction which came up so often without prompting during interviews and focus groups.

There should be a set form that everyone hands out to students on each of the basic issues that come up at the Center. The FAFSA information should be standardized and everyone should give it out each and every time that someone asks for information to assure a constant level of service and information. The request for information should never be responded to on scrap paper. The University has a sheet that was found in various locations on campus but not in the Rocket Solution Central area. It was provided to us by admissions as part of the application packet. This is the FAFSA sheet below.

**Free Application for Federal Student Aid**

**FAFSA Tips**  
[www.FAFSA.ed.gov](http://www.FAFSA.ed.gov)

**What is the FAFSA?**

To apply for federal, state and institutional aid for college you must complete and submit a *Free Application for Federal Student Aid* (FAFSA) each year that you attend. The quickest way to apply is online using the FAFSA on the Web at [www.fafsa.ed.gov](http://www.fafsa.ed.gov), beginning January 1 of each year.

Financial aid offices use information from the FAFSA to determine if you are eligible for different types of federal student aid, such as, grants, loans and work-study. So, be sure to fill out a FAFSA even if you think you won't qualify.

**How do I Apply?**

- **Get a PIN**  
Before beginning the FAFSA, you should apply for a Federal Student Aid personal identification number (PIN) at [www.pin.ed.gov](http://www.pin.ed.gov). The PIN will allow you to sign your FAFSA electronically and later to access your processed FAFSA online. After you receive the PIN assigned to you, we recommend that you change it to something easy to remember. Don't share your PIN with anyone! If you are providing parent information on the FAFSA, one of your parents also must sign your application. To sign electronically, your parent must apply for his or her own PIN.
- **Gather the information Required to Apply**
  - Your Social Security number and your parents' Social Security numbers if you are providing parent information.
  - Your driver's license number if you have one.
  - Your Alien Registration Number if you are not a U.S. Citizen.
  - Federal tax information or tax returns, including W-2 information, for yourself, for your spouse if you are married, and for your parents if you are providing parent information, using income records for the year prior to the academic school year for which you are applying.
  - Records of untaxed income (such as Social Security benefits, Temporary Assistance for Needy Families [TANF] benefits) and information on savings, investments, and business and farm assets for yourself (and for your parents if you are providing parent information).
- **Be Aware of Deadlines**  
Financial aid deadlines for states and schools are usually earlier than federal deadlines.
- **Use the FAFSA on the Web Worksheet**  
Your college or high school might have a copy of the worksheet, or you can print one from [www.fafsa.ed.gov](http://www.fafsa.ed.gov). This worksheet is optional, but it will help you collect the information you need to fill out your FAFSA online.
- **Submit Your Application**

 THE UNIVERSITY OF TOLEDO  
1872

The sheet is helpful but incomplete. The one thing that the RSC counselor did that was more correct than the information on the sheet was to provide the school code for the FAFSA. This is an important bit of information since without it a person has to figure out

how to complete the form and would likely return to RSC either in person or by phone for that piece of information. The goal should be to provide all the information so the client student or parent is fully serviced the first time. This sheet should be redone with the school code as well as the dates by which the FAFSA should be completed for a semester. This information would also let students know what the financial aid deadlines are so they can get their financial aid filed on time.

The FAFSA information online on the RSC webpage has even less information than was provided on the scrap of paper. When one clicks on the link to learn how to apply for financial aid, the viewer is taken to the Financial Aid Office webpage where it has some quite simplistic information on applying for financial aid. Though the webpage is not for RSC, the belief remains on the part of the viewer that he or she is still in the Rocket Solution Center and thus places the blame on the RSC.

The information that the link takes one to does not mention the need to get a PIN or provide the UT code. It in fact had very little information that could help students complete the online process at all and needs to be expanded to provide the basic information students would need to complete the FAFSA. If this is confusing for students it must also be more confusing for their parents who may be even less prepared to do a FAFSA online without any knowledge of the needs to obtain a PIN and UT code. We can only imagine that the lack of information drives more people to come to and/or call the Rocket Solution Central offices. This in turn only increases frustration and the perception that RSC is not competent or helpful. The FAFSA information on the UT website is below.

**Application Steps 1.** The first step in applying for aid is filling out a FAFSA or Renewal Application. Need help filling it out? Contact us, or call 1.800.4FED.AID. **Short on time?** The [Free Application for Federal Student Aid](#) is now available online.



**2.** Keep in touch with us! For many students, all we need before telling them what they can receive is to get the results of their FAFSA or Renewal Application. Roughly 1 in 3 applications are selected for a process called [verification](#). Others might need to clear up questions related to the general eligibility requirements listed above, or submit some common forms. Regardless, it is a good idea to [stay in touch](#) with our office, or [watch your mail](#), so we can stay informed of your application's status.

On another occasion an auditor approached a Rocket Solution Center staff member and asked about what a financial aid verification was and why he was being audited for financial aid. The staff member did not explain what a verification was and why they were done but she did work very hard to see why the fictitious student was being chosen for verification. The auditor provided a name that we use during the mystery shopping

process and the staff member kept trying to find out why he was being verified. The staff member was working quite diligently to help the auditor even though the student was fictitious. This experience indicates that unlike our first encounter, there may certainly be different levels of service provided by the staff who work at the RSC. This “luck of the draw” in personnel was commented on by a large number of students who said they even wait to get “a good person to help rather than one of the rude ones at Rocket Central.” Every student who comes to Rocket Solution Central should receive the same level of service, and by that we mean good service. How a student is treated should not depend on the luck of the draw of the staff member. It appears that some staff at Rocket Solution Central and others we will discuss could benefit by some customer service excellence training.

The way that Rocket Solution Central is used on campus also creates a funnel effect which works against its possibility to be successful. There are just too many issues coming at it all at one time for it to be fully effective. It is asked to be a one stop shop by the campus for financial aid, registration and cashiering. These three areas are normally handled by three different locations on a campus because they are all high volume operational areas with many students who have issues that need to be resolved. Nonetheless, UT decided four years ago to consolidate these into the RSC.

The funnel effect takes many issues and brings them all into one area all at once. They are then responded to by a small cadre of people at the counter at Rocket Solution Central thereby slowing up the process quite a bit. This funnel effect is one reason why there are almost always waits to be serviced at the RSC. There is simply more volume than the center can handle with current staffing levels, even during slow times.

The times we went to the RSC there were two people on the desk. That caused us to have to wait to be seen by a staff member because there were two people ahead of us waiting to see the staff members for assistance. We can only imagine the length of lines which were reported by students as taking over two hours to proceed through during the rush times at the start of semesters.



There are also only three workstations at the RSC which means that the funnel effect is physical as well as functional. The physical structure limits the number of people who can be helped at any one time. There is a desk to the right of the counter that we were informed can be used to work with some students as a sort of FastTrack situation for quick issues to be taken care of but it was not staffed any of the days we were there. Students complained that at the beginning of semesters they can wait for over two to three hours to take care of a simple action such as getting a form signed.

The hours of the Rocket Solution Central are also not helpful to evening students. The RSC is open from 8:15 to 5:00 on Monday, Thursday and Friday and only stays open to 6:00 at night on Tuesday and Wednesday. This means that a student who attends in the evening, typically a working adult has to leave work to get to the Rocket Solution Central to take care of business that he or she may have with the RSC. There needs to be at least one evening that then Center stays open even later to let evening students take care of their business without having to leave work to do so prior to the RSC closing. It has been said that one can call the RSC and leave a message and they will get back to you but when posing as an adult student and leaving a message at night, we found there was no return call.

When one calls the Rocket Solution Center phone line given on the website (419-530-8700) one gets a long phone tree that does not mention the Rocket Solution Center. The tree begins by welcoming the caller to the University and asking that the caller have the student's Rocket number. Next it goes to general information on self-service; undergraduate admissions; the housing office; student accounts, financial aid, and registration. We understand that these last functions ARE the Rocket Solution Center but in the phone tree, the office the student is seeking (Rocket Solution Center) is never named. Next it offers a voice directory which when selected gave a message that it was busy or not functioning and then the call is ended. Finally there is information on the Health Science Center. There is never just a welcome to the Rocket Solution Center which is what the caller called for. When people call the RSC they want to get directly to the Solution Center and not a phone tree that seems to be shuttling them away from the RSC. They want to get directly to what they believe they have called.

When the caller did enter the number for student accounts, financial aid, and registration, the phone rang and no one picked it up. We left a message for someone to get back to us, but there was no return call either. One time someone did pick up the phone, and we asked about financial aid verifications. We were told to go online and watch the video on verifications and come into the office to discuss it. The online video is fairly good and presents the verification information in a good way, but this call was not helpful. If one calls to get information they should be able to get that information.

Rocket Solution Central's telephone number should be a direct line to the RSC. There is a need for the University to have a general number and a call center that can take care of many issues and functions as will be discussed later in this report, but the number to the

RSC should go directly to the Center. There should not be a phone tree that gets in the way.

### **Suggested Solutions for the Rocket Solution Central**

The university needs to promote the RSC for what it is and clarify what it is not. It is not an all-purpose one stop shop for all student issues though the name would imply that it is. And the reality is that the University does believe that it is a one stop shop for ALL issues. This leads people to send students there for issues that the Center is not equipped to handle. This in turn increases the number of issues the RSC is hit with that it cannot handle, and subsequently increases student dissatisfaction.

The RSC is set up to handle front office financial aid, cashiering and registration issues all of which the University is trying to move to an online environment. A campaign needs to take place across the University to re-assert that these are the functions that the RSC can and does handle to stop the use of it as a “dumping ground” for all issues that people either cannot or do not want to deal with. The RSC is four years old, and we are not sure that its functions have ever been clearly communicated to the University.

The staffing in the RSC is not adequate to meet the needs especially during crush times such as the start of semesters, nor is the office set up in a way that can allow for enough staffers to meet with students to avoid excessively long lines and waits. Three stations when hundreds of students are coming into the Center at once just cannot manage the flow. This leads to a very negative customer service situation. Granted the University is trying to move more student functions online and trying to get students to use the online functions such as cashiering, but there are some issues facing these functions as will be discussed later in the report.

The Center either needs to be reconfigured to allow for more staff to be able to serve students in peak times or the University needs to find another way to move people from lines to other ways of service. We suggest that a call center for the Rocket Solution Center could be a solution with a number that is dedicated directly to the Center.

Realizing that the University sees the Center as a one stop shop, one way to take care of the issue is to work with the perception and set up a call center that can handle a wide variety of issues immediately and efficiently. Though we have recommended that the University start a campaign to clarify the use of the RSC, we do believe a general call center with a direct number could also solve many of the problems that Solution Center has. It may not be fully possible to end the perception that the RSC is the place to solve all issues, so setting up a call center as described below could help solve some of the major issues and end the lines that form during peak hours. There will need to be a dedicated number that goes directly to the call center without any phone tree.

### **ALTERNATIVE SOLUTION FOR THE ROCKET SOLUTION CENTER**

A more comprehensive solution to the issues identified during the audit would be for UT to implement an effective Call Center equipped with adequate staff to manage call volume and appropriate resources for that staff to effectively respond to the needs of the majority of callers.

We believe, although we were not able to validate, that UT has attempted to create a central receiving function for incoming calls in the Rocket Solution Center number which further confuses the purpose of the RSC to the University. Our experience calling in was less than satisfactory. Our presumption was that it was a University call center reached when calling into the main telephone number of the RSC when we got the phone tree; an information desk of sorts where the caller could ask any question and get an answer. If this is the intention, much work needs to be done to improve the customer service delivered by this office.

We recognize that the current staffing levels may not be adequate to meet the demands of the number of phone calls received and budget realities may preclude an increase in staffing needed to provide better coverage for incoming calls in individual offices. These financial constraints require innovative approaches. We strongly recommend that UT create a call center much like the one at Columbus State Community College (CSCC) in Ohio which is an effective solution to the high volume calling there.

This report provides a description of the CSCC call center as a way of introducing UT to what we believe would be a comprehensive solution to a number of its customer service gaps in the RSC. The implementation of this solution will take careful planning and experienced management.

### ***A Model Call Center***

The CSCC call center has been in existence for nineteen years. It started in July of 1992 and is a successful attempt to take the problem of poor customer service resulting from less than adequate management of incoming calls, high volume activity in routine tasks, and staffing shortages. The result has been a great benefit for the school. It started as a way to end the long lines students experienced trying to take care of basic tasks like registration, drop/adds, and respond to admissions questions and requests. It has become a central feature in CSCC's customer service initiative. The call center ended the telephone shuffle by having all external calls directed to one spot where trained telephone professionals answer the phone and take care of the caller's needs. If they are unable to meet the caller's needs they connect the caller to the correct contact person.

For example, if a student has to change her schedule during registration, the student can call into the center and the trained professional can cancel a class section, help the student choose another day and time or even another course in the major, schedule the student, accept any change in payment or fee, and even order and accept payment for the books which will be mailed out to the student. This one-stop service center eliminates many of the frustrations that UT students reported as their experience. There would be no need to find a parking spot, run around to the registrar's, cashier's, and financial aid offices, find an adviser, go back to the RSC (and perhaps financial aid and the cashier), and then the bookstore to complete the change. The system at CSCC not only alleviates student frustration, but enables specialized staff (i.e. registrar, financial aid, cashier, etc.) to focus on back office operations while customer service is delivered by the call center personnel.

The CSCC call center provides a high quality of customer service. The call center helps an average of 1600 people/calls a day and even more during registration time. The normal shift has ten full and part-time people answering the phones and helping callers. The representatives are trained to take all the time the caller needs to help resolve any issues, and do all they can to make sure everyone hangs up the phone feeling heard and helped. Staff working the call center report it is a great and rewarding place to work, and the full time staff have been there from four to seventeen years. Once they are there, they stay in this demanding but very satisfying job. Satisfying because they really do help people, and they report the center leadership is great to work for.

To implement such a call center, UT would first need to assess the number of incoming calls per day and the nature of those calls. UT needs to identify the main reasons people contact UT and the RSC and begin to compile resources for addressing the callers' needs. Once the call volume and nature of the calls have been established, functional resources need to be developed, a location for the center selected, and an experienced call center manager selected to implement the project.

### ***Call Center Hiring***

Key to an effective call center is its director. A careful search (both internal and external) for an experienced call center manager, particularly someone experienced in opening new centers will provide UT with the expertise needed to fully develop the model within UT's culture.

According to the Call Center Director at CSCC, new agents are selected not on experience with call centers but on their personality and creativeness. "They need to be really creative to be able to think and realize what a caller is really asking. Sometimes they also need to become an actor and show interest even if they are not. Many of the calls we get are often the same, and it can be hard to sound interested in the thirtieth change a course call in a row. So the agents need to be creative enough to find ways to motivate themselves and show the caller they are interested even if they are faking it."

They also look for people who are organized. Call takers have to know where their information is and get to it quickly so they do not keep the caller holding. This avoids long periods on hold which tends to diminish the customer service experience. The agents need to be able to know where the correct information can be found. The experience at CSCC reveals that people with food service experience tend to do real well in the call center. They come to the job with a hospitality experience that suits them well for the work in the center.

Another key ability to look for when hiring is a good sense of humor. "They have to have a good sense of humor to roll with the punches. Not every caller is great to work with. Some are downright rude and impolite, and you have to be able to laugh it off or you'll go crazy and take it out on other callers," according to the CSCC Call Center Director.

### ***Call Center Training***

Every new agent receives a full three week training course that begins with gaining knowledge about UT itself. Trainees experience a full campus tour including the inside of all buildings so the trainee can later picture what they are talking about. She or he then walks the trainee into all the various departments and offices that the center interacts with, stopping at each one to discuss what they do and make introductions so the trainee can later put faces and names with actions and places. The agents really need to know how and what they are talking about to provide the full customer service with confidence and empathy.

Next the agent is trained on the use of all online internet forms and CSCC's Constituent Relationship Management (CRM) system. If call center staff are going to help students complete forms like add/drop forms or financial aid forms (FAFSAs), they need to fully understand the process. They also need to know how to log every call into the system for future reference and to help the caller without making them go through the entire history of an issue.

They are next trained on "how we do it." This is not a commercial call center. No quotas; no time constraints. The mission and purpose of the center is to help callers and have them leave satisfied and with answers or resolution no matter how much time it takes. They are taught give a name – get a name; how to talk with people and how to listen; and how to follow the center's three P's "Be patient, polite and professional" at all times. Only after they are fully equipped to manage calls and have absorbed the P's will they start to listen in on calls and then start taking calls themselves. The center's first and only director says it really takes about six months for agents to be fully trained. Even after they are "trained" ,the training continues with supervision of their calls. Training is not a quick affair but an on-going aspect of center success.

### ***Operations***

The center handles most everything from admissions questions and application information through some areas in which other schools including UT fall down like advising, registration, and even financial aid. Even parking which is a huge issue at the University. The center staff can advise on what courses are available for their major, can tell them if they have made appropriate academic progress to take a course, if they have met pre-reqs for a course, and can quickly find the requirements for programs a student might be interested in. Then they place them in the course or the major area. They can also help students choose majors by listening to them and guiding them into programs that they are looking for. They can even look at a transcript from outside UT and let students know what courses can equal what or the reverse, what CSCC course will be accepted at another Ohio college. This level of service is amazing and really helps kill the shuffle that starts when a student needs to find an advisor to move forward in his career at CSCC. They are so knowledgeable that faculty, even department chairs call them for help in academic matters at times.

The center can also handle all financial aid questions but does not do any backroom calculations of financial aid. They can and do guide students through the FAFSA, deadline

information, explain loans and availability of them to students and families who call in. They can also let the students know what financial aid has been awarded and how to access it. They also can work with students on academic progress issues that can affect how much financial aid is available. For example they can tell a student how many courses they attempted, completed, and passed could affect their financial aid. They can tell them that because of lack of academic progress the student is on the restricted list and will need to take (or retake) a certain class to get their grade level where it needs to be to receive financial aid. If there are some personal issues or calculations needed or issues that are too specific, they set up an appointment for the student with a professional financial aid adviser.

The goal of the call center is not to replace The Rocket Solution Center or any other office but to positively supplement them by taking care of issues that can be handled in the call center effectively replacing what might have been a well-trained, highly skilled receptionist. That way the professionals in specific offices can focus more fully on serving students who come to them for more in depth issues than repeating the same simple service which takes time away from providing really good service to students who really need their expertise.

We strongly recommend that UT contact the CSCC Call Center Director Nina Reese, explore how to change the Rocket Solution Center phone answering into a UT call center and then do it. It will remove all the problems we discovered in the telephone protocols when calling the RSC and the resulting poor customer service. It will also address a number of other problems that result from the online services for which students still require administrative support.

We also recommend that all the staff in the RSC undergo further customer service excellence training. Too many students complained that the service they received was perfunctory and incomplete depending on which staff member happened to be working the counter. Our experience with the FAFSA question and the gentleman who provided the token information validates this observation by a majority of students.

### **Advising**

Advising is a very mixed situation at the University. The students were quite critical of many of the advisors yet students in the Colleges of Pharmacy and Business were complimentary of their advisors.

Student advising appears to be done within each College within the University which appears to produce a wide range of student experiences. We were told by staff that there were approximately 24 advisors for the entire University, resulting in a student to advisor ratio of well over 800:1. Many students reported it was difficult to learn who their advisor is as there is no available list of advisors either in hardcopy or online. Once students do identify where and by whom they could be advised, they reported long waits for appointments, or long lines when drop in service was provided, and also noted some advisors provided wrong information which resulted in missteps in the student's course selection and setbacks to their academic progress. Some students reported that advising appointments were hard to get and then once they were

meeting with an advisor, they seemed rushed and students did not feel well served. Students also reported that academic program changes were not being kept current in the information available on the website and that advisors in many departments did not have the most current information making it difficult for them to provide appropriate guidance to students in selecting substitute courses. Arts & Sciences and the Communication departments got mixed reviews on advising while Education, Criminal Justice and Health and Human Services departments were consistently rated poor. The Pharmacy program consistently got good reports from students about the quality of their advising. We would recommend UT examine this as department as a potential model for best practices in student advising.

The advisors were criticized for not being available, taking too long to get an appointment and too often not knowing what they were talking about. This is especially true in the newly merged College of Health Science, Human Service and Education. This is a merger that may not have gone as well as the University had hoped especially when it comes to advising.

For example, one student reported that it took her weeks to get an appointment after the merger since the University also reduced the number of advisors in the newly formed college though it increased the numbers of students threefold. The student reported that her advisor had “over a thousand students to advise and it was just too impossible to get in to see her. When I did get into meet with her she was not really familiar with my program and told me to take wrong courses. I needed to take some freshman courses that were pre-reqs but she did not seem to know that until it was too late. Now I will have to try to get the courses and it will make me stay another year at least at the University and I don’t know that I’ll have the money to do that.”

This experience in the College of Health Science, Human Service and Education was reported twenty-three times by the students who were in the programs in the merged college. This is a situation that could easily lead to students having problems in choosing courses, having to stay longer and then having to either go deeper into debt or dropping/stopping out due to lack of funding. This is also reported as a problem in the College of Literature, Language and Social Sciences where a student reported as did others that they have trouble seeing an advisor and the one they see are not knowledgeable enough about all the programs. As a Spanish education major stated “First off it is just too much of a hassle to get to see anyone. If you do get to see someone he doesn’t know what he’s doing because he covers too many programs and doesn’t know mine at all. But the biggest issue I guess is that I can’t even get in to see him to plan my next semester and I have to because I am a double major but considering that he doesn’t know his staff maybe that is better.”

It appears that the University has tried to reduce the number of advisors and move more of the advising to self-advising via the website. This is not a good customer service decision. Students are told to see an advisor but when there are not enough of them they cannot do so. Students reported for example that in the respiratory therapy programs advisors were moved out of the building and to get an appointment with one now takes months. “They will answer emails but that is not what I want or need. When I want to see

and advisor I should be able to get one fast. I'm paying a lot of money and advising is one of the things that I am paying for." The same comments were common for most every other program including nursing which students reported "took months to get an appointment." This is not a good situation especially considering the student population at the University. Many of the students are first time in family attendees so they do not know the ways of the University and their parents cannot help them either. These students do need to be able to sit down with an advisor to determine their programs and what courses they need to take. This is especially so for freshman who have to see an advisor in some programs but cannot get an appointment to do so. Self-advising may work well for more seasoned students but not for those early in their careers which is why a very common problem was that the students could not get to see an advisor, self-advised and chose the wrong courses.

One student reported that he went to see his math advisor because he was taking an exam and the system froze blocking him from completing the test. He went to see the advisor during office hours but there was no one there. He next made an appointment to see his advisor but when he went to the appointment, the advisor was not there. He made another appointment but when he went to the office there was a sign on the door that said "gone fishing. Email me."

Many students do use the websites of the various programs or the degree sheets with the courses needed to graduate listed but these forms are not consistent or always complete. Some just list courses that students may need to take in a general way such as the degree requirements to graduate in one of the more popular programs Psychology

**PSYCHOLOGY**

Arts and Sciences is an academically diverse college that offers 43 different majors and over 1,600 different courses each year from African-American History to Zen Philosophy. Its programs emphasize the critical thinking and communication skills necessary for every job in today's market.

College of Arts & Sciences

Group campus tours are available Monday through Friday at 10:30 a.m. or 2:30 p.m., and on Saturday at 11:15 a.m., year round, with the exception of national holidays. Individual admission appointments are available by request. Individualized college or department visits are also available weekdays at 1:15 p.m. by appointment. [utoledo.edu/admission/campusvisit](http://utoledo.edu/admission/campusvisit)  
800.5TOLEDO

### Degree Requirements\*

All students must satisfy the degree requirements of the University Core and the College of Arts and Sciences in English composition, mathematics, foreign language, humanities, natural sciences, social sciences and writing across the curriculum. Under most circumstances, students should plan to complete all or most of the Core Curriculum and College requirements during their first and second years. The official degree requirements are published in the General Catalog of The University of Toledo at [catalog.utoledo.edu](http://catalog.utoledo.edu).

Students are exposed to major substantive areas of psychology by taking five of the following core courses:

- PSY 2200 Abnormal Psychology
- PSY 2400 Cognitive Psychology
- PSY 2500 Development Psychology or PSY 2510 Lifespan Developmental
- PSY 2600 Psychobiology
- PSY 2610 Learning and Motivation
- PSY 2700 Social Psychology

Beyond fulfillment of the psychology core all students must also complete 11 hours of methodological courses:

- PSY 2100 Statistical Methods
- PSY 3110 Research Methods in Psychology

In addition, students are required to complete one of the following advanced research courses:

- PSY 4100 Research Practicum
- PSY 4110 Qualitative Research Methods
- PSY 4200 Research in Clinical Psychology
- PSY 4400 Research in Cognitive Psychology
- PSY 4500 Research in Developmental Psychology
- PSY 4600 Research in Psychobiology and Learning
- PSY 4700 Research in Social Psychology
- PSY 4910 Independent Research

Electives and related courses, which complement the requirements listed above, are critically important in preparing for career options, including employment or graduate work in psychology or in a related field. These courses should be selected in consultation with a department adviser.

For more information about Psychology, contact:  
Dr. Joseph D. Hovey, Chair  
Department of Psychology  
The University of Toledo  
Toledo, OH 43606-3390  
419.530.2717  
419.530.8479 (Fax)  
[joseph.hovey@utoledo.edu](mailto:joseph.hovey@utoledo.edu)  
[utoledo.edu/psychology](http://utoledo.edu/psychology)

\*Degree requirements are subject to change. Please consult the department for up-to-date information. For more detailed program requirements go to [catalog.utoledo.edu](http://catalog.utoledo.edu).

This listing of courses that are needed to graduate cannot replace an advisor since it does not show the sequence and when each course should be taken nor does it show the general courses required by the University to graduate. Moreover when one goes to the web to find the degree requirements for psychology in the catalog, the link to the College of literature, language and Social Science is not functioning. Further, the search engine on the web is not functioning well and does not always show the correct or requested information. When we entered degree requirements for psychology major the search engine did not show these requirements but started with then College of Business for example. The search engine is an issue that will require more discussion later in the report.

- [College of Adult and Lifelong Learning](#)
- [College of Business and Innovation](#)
- [College of Engineering](#)
- [College of Literature, Language and Social Sciences](#)
- [College of Natural Sciences and Mathematics](#)
- [College of Pharmacy and Pharmaceutical Sciences](#)
- [College of Visual and Performing Arts](#)
- [Honors College](#)
- [Judith Herb College of Education, Health Science and Human Service](#)
- [The University of Toledo Learning Collaborative \(UTLC\)](#)

## Suggested Solutions to Advising

If the University is moving more to self-advising then the curriculum outlines need to all look more like the one for International Business which was found in the Admissions Office is complete and provides a roadmap educational plan.

**INTERNATIONAL BUSINESS**

The College of Business Administration has wireless laptops with Internet access and accessories for students to check out and use in Stranahan Hall. The College won Dell's GenerationIdea nationwide contest for this innovative use of technology, originality and appropriateness to other higher education institutions.

Group campus tours are available Monday through Friday at 10:30 a.m. or 2:30 p.m., and on Saturday at 11:15 a.m., year round, with the exception of national holidays. Individual admission appointments are available by request. Individualized college or department visits are also available weekdays at 1:15 p.m. by appointment. [utoledo.edu/admission/campusvisit](http://utoledo.edu/admission/campusvisit)  
800.STOLEDO

**Sample Curriculum\***

<p><b>FIRST YEAR</b></p> <p><b>Fall Semester</b></p> <p>BUAD 1000 Orientation to Business 1</p> <p>ENGL 1110 College Composition I 3</p> <p>MATH 1260 Calculus with Business Application I 3</p> <p>BUAD 1010 Intro to Business 3</p> <p>Humanities Elective or Foreign Language Elective** 3</p> <p>Social Science Elective 3</p> <p style="text-align: right;">Total 16 hrs.</p> <p><b>Spring Semester</b></p> <p>ENGL 2060 Organiz Report Writing Applications 3</p> <p>MATH 1270 Calculus with Business Application II 3</p> <p>BUAD 1020 Micro-Computer Applications 3</p> <p>ECON 1150 Intro to Macro Economics 3</p> <p>Natural Science Lecture Elective 3</p> <p>Natural Science Lab Elective 1</p> <p style="text-align: right;">Total 16 hrs.</p> <p><b>SECOND YEAR</b></p> <p><b>Fall Semester</b></p> <p>BUAD 2040 Financial Accounting Info 3</p> <p>BUAD 2050 Data Analysis for Business 3</p> <p>ECON 1200 Intro to Micro Economics 3</p> <p>Humanities Elective 3</p> <p>Non-Business Elective or Foreign Language Elective** 4</p> <p style="text-align: right;">Total 16 hrs.</p>	<p><b>Spring Semester</b></p> <p>BUAD 2000 Career Development I 1</p> <p>BUAD 2050 Acct for Decision Making 3</p> <p>BUAD 2070 Application of Statistics 3</p> <p>BUAD 2080 Global Environment of Business 3</p> <p>Multicultural U.S. Diversity Elective 3</p> <p>Natural Science Lecture Elective 3</p> <p style="text-align: right;">Total 16 hrs.</p> <p><b>THIRD YEAR</b></p> <p><b>Fall Semester</b></p> <p>BUAD 3000 Career Development II 1</p> <p>BUAD 3010 Principles of Marketing 3</p> <p>BUAD 3470 Legal Environment of Business 3</p> <p>BUAD 3030 Managerial &amp; Behavioral Process 3</p> <p>BUAD 3040 Principles of Financial Management 3</p> <p>COMM 3880 Professional Business Communication 3</p> <p style="text-align: right;">Total 16 hrs.</p> <p><b>Spring Semester</b></p> <p>BUAD 3020 Mfg &amp; Service Systems 3</p> <p>BUAD 3050 Info Tech Management 3</p> <p>IBUS 3150 Major Elective and Multicultural Non-Western 3</p> <p>IBUS 3600 International Management 3</p> <p>Business Elective/Minor Elective 3</p> <p style="text-align: right;">Total 16 hrs.</p>	<p><b>FOURTH YEAR</b></p> <p><b>Fall Semester</b></p> <p>FINA 3500 International Finance 3</p> <p>MKTG 3140 International Marketing 3</p> <p>International Business Electives 6</p> <p>Business Elective/Minor Elective 3</p> <p>Non-Business Elective or Foreign Language Elective** 3</p> <p style="text-align: right;">Total 18 hrs.</p> <p><b>Spring Semester</b></p> <p>IBUS 4940 Approved Internship, Study Abroad or Business Sub 3</p> <p>BUAD 4020 Senior Bus Policy Forum 3</p> <p>IBUS 4360 Global Strategic Mgmt 3</p> <p>Business Elective/Minor Elective 3</p> <p>Non-Business Elective or Foreign Language Elective** 3</p> <p style="text-align: right;">Total 15 hrs.</p>
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For more information about International Business, contact Dr. Anthony Koh, Chair Department of Marketing and International Business College of Business Administration The University of Toledo Toledo, OH 43606-3390 419.530.2093 [anthony.koh@utoledo.edu](mailto:anthony.koh@utoledo.edu) [www.utoledo.edu/business/MIB](http://www.utoledo.edu/business/MIB)

\*Sample curriculum is subject to change. Please consult the department for up-to-date information. For more detailed program requirements, visit [catalog.utoledo.edu](http://catalog.utoledo.edu).  
\*\*Foreign language proficiency through level 2150 required. See adviser for more information.

A roadmap plan shows the students what courses to take and when to take them just as a MapQuest driving directions would show a driver exactly what road to take and when to turn. These need to be developed for every program and replace the curricular information that is online. The roadmaps need to be complete and provide a semester by semester choice of courses to take as with the International Business roadmap. It would be even better if the electives were limited and listed as ones recommended by the department to assure that they meet the degree requirements.

What would be even better however is to increase the number of advisors that are available to students. The merger into the Judith Herb College of Education, Health Science and Human Service seems to not have gone well as far as advising goes. There are simply too few advisors for the number of students who need to see an advisor. The reduction in the number of advisors throughout the University has had a negative effect on the customer service that students expect and need. We would strongly recommend that when possible the number of advisors be increased to be able to handle the number of

students who need to see and advisor. A ratio of a 1000 to one is much too high.

If this cannot be done then we suggest that the roadmaps be developed for every program and that they be integrated with an online program that can be developed to match the courses students have taken or chosen against the roadmaps to show what courses are next needed to be taken. This sort of technology can be also empowered to go to the semester course schedule for the upcoming semester and show what a possible schedule could look like. This would be a way of self-advising with some assurance that students would choose the right courses.

All advisors need to be retrained not only in the how's of advising but to the programs they advise students in. Moreover, they need to learn about other program changes in other programs that may not at first seem to affect the programs they are advisors for but may well have an effect for students who transfer in or out of programs. They need to all be retrained to be able to read a degree audit form properly so they do not incorrectly advise students into the wrong courses. They need to also be able to read an educational plan and compare that to a degree audit to be able to advise students what courses they need to take the next semester to stay on track toward graduation in the most effective way possible. This is especially so for the advisors in the newly merged Judith Herb College of Education, Health Science and Human Service where advisors now have to advise in programs they were not familiar with. From many student comments it seems they are not aware of the programs they are supposed to help students in and the result is poor advising leading to the wrong courses and longer stays at the University or drop outs.

### **Faculty**

Students generally reported being satisfied with their educational experience. Specifically, students felt the majority of faculty were knowledgeable and friendly. Specific mention was made that professors in law classes have real world experiences to share which are helpful in demonstrating the application of theory. Five of the 38 students made note that requiring faculty to hold office hours was a plus and they confirmed that they were able to meet with faculty during those times. Conversely, a greater number of students and our own observation did not support that the majority of faculty posted office hours near their offices and a number of students actually complained that either faculty were not available during posted hours or would not meet with students outside of the posted hours. In fact, 21% of all faculty offices inspected did not have office hours posted. Seven of the students interviewed said that they had trouble getting to see their faculty members outside of class and that the faculty were too often one of the first ones out the door making it difficult to ask them questions about the class.

It was noted that the English department had a listing of all the faculty members' office hours listed near the department office and this is certainly a plus. This listing is something we recommend for all departments to assure that faculty not only list office hours but that students can locate them easily.



use Power Point tend to just put the slides up in the class and just go through them without any real interaction with the students. This led to some classes in which not much learning was taking place just note taking. From discussions with students it appears that one customer service they expect is greater interaction in the classroom and opportunities to ask questions if they do not understand something during the class lecture. The use of Power Point reportedly interferes with the provision of this service.

Some students also reported that the classes with Power Point as their basis also had the most decorum issues. Decorum in the classroom seems to be an issue that students have noted with 14 students pointing out that the professors do not seem to be in control of the classes and this is made worse by the use of Power Point. Students are allowed to come in late; leave the classroom and return; play games on their laptops and go to Facebook and talk in class among themselves while the professor just continues on through the PowerPoint presentation. All of these are disruptive factors in a classroom and interfere with one of the basic services the University provides – learning. If the faculty member does not maintain decorum in the classroom, a small number of students can interfere with the learning of all others through interruptions and disruption.

It is interesting that students pointed out the lack of decorum in the classroom. This would indicate that there is a level of classroom disruption that is high enough to be noted and may extend beyond the number of students who pointed it out.

Students also complained about having teachers they had trouble understanding because they are international graduate students whose first language is not English. This is a complaint that came up enough times for us to note it in the report. We are not sure what the solution is since graduate assistants in some programs are going to be international students. But we do hear the students who feel they are getting less than good service in these classrooms and note it as a customer service issue. Perhaps it would be wise to make sure that all graduate assistants who are international students have a clear enough grasp of the language and pronunciation to assure that they can be readily understood. As one student put it “I am having real trouble in the math class simply because I cannot understand what the professor is saying and that is not fair to me at all. I have enough trouble with math and don’t need it made worse because I just can’t understand the professor.”

Other students complained that faculty are too negative about the University and use too much time in class especially at the beginning to “talk trash about the University. They especially think that the administration just does not care or listen to faculty. And they don’t like President Jacobs because he came from the medical school. Well, I don’t care what they think. I’m there to get an education that I’m paying a lot of money for and don’t want to hear it.” Students also report that faculty use the classroom as a forum to complain that the administration is too authoritarian such as the proposed move to go from a faculty Senate to a University Senate. Students do not want faculty using class time to criticize the University they are attending and want faculty to spend more time on classroom learning. This also creates a negative attitude in students who hear the administration being “trashed” about getting bonuses when tuition is going up and positions are being cut. The population of students appears to be a very practical one that is at the University for an education to get a job and do not want their time taken up by

faculty complaints about the administration.

Students reported wanting to see grades posted in Blackboard throughout the term so they would know where they stood academically, and most of those complaining about this said the only way to find out where you stood was to ask a the faculty member. A great number of the students interviewed reported that many of their faculty were not using Blackboard at all. In fact the most frequent complaint about Blackboard was that “none of the teachers use it”. Students suggested that the transition to Blackboard was not smooth, that faculty do not appear to have been trained and therefore are unable to upload documents and/or utilize the grading feature. Many students reported that Blackboard is used only to post announcements, but since that is the only use, the students do not check they system frequently and often miss announcement. It was suggested that Blackboard be upgraded to send students an email when announcements were posted. In only one group of students did the question of the mobile app for Blackboard surface with two out of three students not being aware there was a mobile app. Additionally many students reported that Blackboard had problems and was often not available. Furthermore, many students reported that faculty had not been trained on Blackboard and were ineffective in their use of the system (if they used it at all).

Overall, students reported a desire for Blackboard to be used more consistently and for grades to be available online throughout the term. Combined with that, students suggested that there needed to be some training for students about how to use Blackboard and myUT. The system, they reported, kicked them out (session timed out) frequently during test taking, required them to download an additional browser, and was often down recently.

There were a few comments about Chemistry courses being “harder than they needed to be for students not enrolled in science majors”. Students complained that the courses were taught toward those in the pharmacy major and went too deep for general education courses. There were a few reports about History in this same vein, and in both cases, students reported being discouraged by the difficulty of the courses.

The consolidation of the College of Education into the College of Health and Human Services and the separation of the College of Arts and Sciences into three distinct Colleges (Visual and Performing Arts, Language, Literacy, and Social Sciences, and Natural Science and Math) has, according to students diminished the ability of those entities to provide adequate service, and in the case of the separation of the College of Arts and Sciences has devalued the perceived value of those degree programs.

### **Suggested Solutions to Faculty Service Issues**

All faculty should post office hours. To not do so is to deny students a basic customer service. And when the hours are posted faculty must be in their offices to meet with students. We recommend that all departments collect the office hours from the faculty and post them in a consolidated form as does the English Department as shown above, This would force faculty to establish office hours and make it easier for students to learn when those hours are by going to one location. Granted, the syllabus given out to each student should list the office hours and locations but according to some students this information was not always made available on the syllabus. This lack of information may represent the twenty-one percent of faculty who did not

post office hours near their doors of the office but if that is so it is a sizable number. All faculty should hold office hours to allow students to get the extra help they need and deserve.

The University should consider, create and adapt a unified classroom decorum policy. When we hear from students complaining that the classrooms are not well controlled by the faculty, we have to believe that there is a problem. We recommend that the University begin by realizing that the education of the many should not be disrupted by the bad behavior of the few. We recommend that there be set rules that everyone would follow in reference to students coming late to class; leaving class early and even re-entering; use of cellphones and texting in class; sleeping in class and any and all other disruptive activities that take away from the learning experience of others.

Power Point presentations are a problem according to many students but this is a difficult issue to address since many faculty rely on Power Point to teach and then post on Blackboard for students to be able to use again after class to review the material. This is a good reason for suing Power Point. What we recommend is that faculty be taught how to segment the power point presentations into sections that make learning sense during the class. Then at each of the segment endings that faculty member should turn away from the power point presentation to make sure that the students understand what is being discussed. This can be done as often as each slide if need be to assure that students are following the lecture and understanding the material.

Power Point can be a valuable teaching tool but too many faculty do not know how to use it as a lecture device and create what a student referred to as “power point hell” in which the slides just go one after another and there is no time for discussion. Faculty need to be taught the best way to use Power Point in the classroom. We recommend that in-service activities be provided to faculty to teach them the best way to integrate Power Point as a lecture and discussion tool and not just as a way to move through the material. Faculty development sessions on teaching with Power Point would be valuable and increase one of the basic customer services to students –teaching and learning.

Along the lines of faculty development, it was found that many of the faculty do not know how to use Blackboard as a teaching adjunct to their classroom work. Student complained that not all faculty used Blackboard and many did not post grades at all on Blackboard so they did not know how they were doing in a class. We recommend that in-service sessions and orientation to Blackboard become part of the teacher training program at the University. Students want faculty to use Blackboard but the faculty cannot do this if they do not know how to use it. There were numerous comments from students and staff who heard faculty say that the roll-out of Blackboard was just too quick and there was not training provided for enough faculty. The University needs to go back to the training of all faculty in the use of Blackboard to make full use of it and the service that students want and expect from Blackboard.

There was a notable service added aspect that one of the science academic departments had near to its faculty office that we would recommend all departments copy. This is a board with all the



faculty and staff with their pictures so that students could quickly identify who they were. The board also listed the office locations of the faculty and staff to make it easier for students to find the people.

### **Financial Aid Office**

Many students still end up at the financial aid office where they report they get the run-around and not good service. In fact, some students reported that the people in the financial aid office are quite rude and not at all helpful. For example, one student reported to the Office of Student Experience that when he went to financial aid for help paying for schools, he was treated very rudely. When he explained that his resources were “tapped out and asked what his options were to get money to pay for school he was told to drop out of college, go to taco Bell, get a job and come back when he has enough money.” This is unacceptable behavior and one of the poorest examples of customer service we encountered at the University.

Students also reported that when they went to the financial aid office to learn about loans and scholarships they were not helped. “They didn’t seem interested in helping at all. They did not have any information on scholarships they said and sent me off to Rocket Solution Central where I didn’t get much better service on scholarships.”

Seven students reported that when their financial aid came through they were not notified about it. They also reported that the financial aid was not always applied quickly to their accounts and they ended up getting late fees for some charges since the financial aid was not posted quickly. This is an issue that will be addressed later in the report under billing since it has caused some serious problems for students whose financial aid was not applied early enough or fully enough leaving them with a bill that led to their rocket cards being shut off by the treasurer’s office.

Students also complained that financial aid lost paperwork on a regular basis. One student reported that she had dropped off the paperwork as requested but when she went back to

check on her progress she was told she never dropped off the paperwork. She again brought in the paperwork and requested a receipt for it but the worker in the office refused to provide receipt to prove the paperwork was dropped off.

We have to be forthright and admit that some of the issues that were raised about the Financial Aid Office may have been from poor experiences at Rocket Solution Central since some of the functions that students reported on getting poor service while trying to get things done sound as if they could have been Rocket Solution Central functions. But the students when pressed were insistent that they meant financial aid which is one of the functions that RSC does handle so there may be some inherent confusion between the Financial Aid Office and RSC in the minds of students.

When we went into the financial aid office, we had to wait for someone to recognize our being at the counter. When someone finally did recognize our waiting there we asked about scholarships and were sent to the RSC. This makes us even more confused about some of the functions of the financial aid office and some of the students' comments which may actually be directed at the RSC.

There were some complaints about the complexity of the financial aid process with a few students reporting they still did not understand the difference between subsidized and unsubsidized loans or why they were not eligible for additional scholarships. Several students reported that communication coming from the financial aid office was lacking noting the lack of confirmation for received documents as problematic.

Many students mentioned that financial aid disbursements were made too late in the term, especially to be helpful in paying for books, and there were reports of calls not being returned by FA. Students also reported that there were times when their accounts had been placed on hold and after visiting the RSC, they thought the problem was resolved only to see it recur in the next day or two.

The Student Work-Study program was an area of concern for an adequate number of students to warrant mention here. There were reports that the financial aid budget had been cut resulting in fewer awards. Students inquiring about availability of work-study jobs complained about not receiving responses from the financial aid department. A few students complained that they were told they would have 20 hours of work but have ended up with only 5 hours a week. If these claims hold true, it is likely that revisiting the work-study awards might free up some of the funding to allow more students to participate in the program. There are only two places at UT where time cards for work-study can be submitted, the Scott Park campus and University Hall, making it inconvenient for students to conveniently turn in time cards. Students have an understanding that on-campus work must be work-study, but expressed concern that they could not work on campus unless they were entitled to receive aid.

### **Suggested Solutions for Financial Aid**

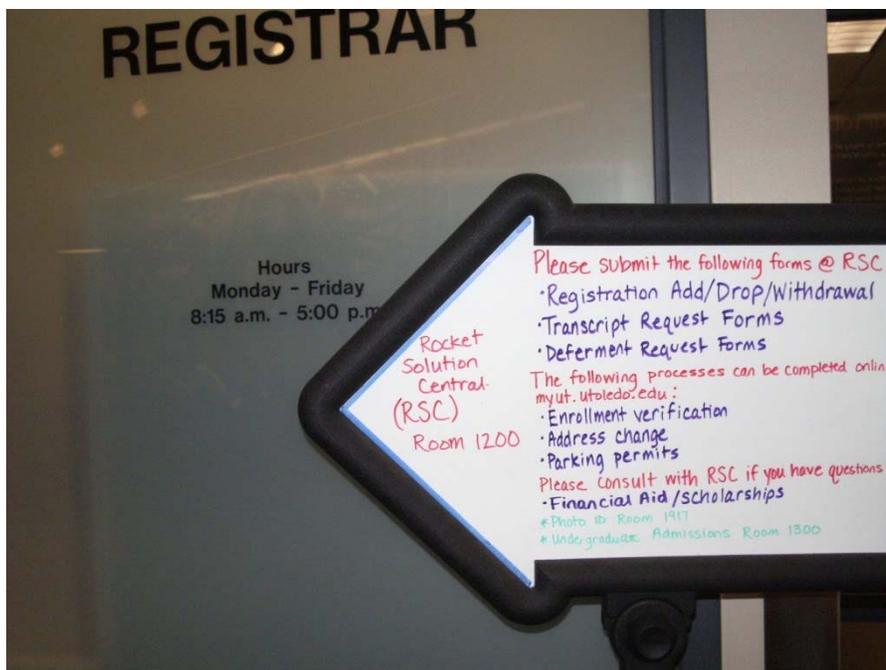
The financial aid office needs to set up some sort of paperwork logging system in which all received paperwork is logged in to assure that it can be found at a later date. This could possibly be done with a scanning system that would make copies of every form that is provided by students. Losing student paperwork is simply poor customer service.

Students also need to be given receipts for the paperwork they have turned in so they can show that the paperwork was actually brought to the office. If these receipts are coded to the canned documents the Financial Aid Office could cross check the documents and find any and all documents that are brought to the office so students do not have to go around again and re-file information.

The staff in the office could also use some customer service excellence training since they did not respond to quickly when people came into the office. They let our auditor wait at the counter while they continued with what they were doing. This is not good customer service. A client needs to be recognized as soon as he or she enters the office.

It is important that the role of the Financial Aid Office be made more explicit so students can know if they should go to the Financial Aid Office or Rocket Solution Central. This is also true for all the staff who are sending students to the RSC or Financial Aid when they do not need to go to both. This just adds to the run around because people are not fully sure what each office does. There appears to have been a breakdown in the staff's understanding of what different offices do after the reductions in force, mergers and new initiatives. The University may not have communicated the changes as well as it could have and that has led to confusion on the part of the staff which believes that there has been too much change too quickly without adequate notification or training.

A sign in front of the Financial Aid Office similar to the one that is front of the registrar's office might be helpful to direct students to the RSC when that is the place they should be going to. Though this sign is a bit crude and not as professional looking as it could be it is helpful and a similar one could be helpful to clarify the functions on the Financial Aid Office and the RSC when it comes to front-line financial aid service.



### **Treasurer's Office**

The Treasurer's Office (which is the current name for the Bursar's Office) elicited many negative comments from students. They uniformly do not like that fact that the entrance to the office has been shut off to them by a unit in which they are asked to just drop off payments by check. They do not like having to just drop off a payment with no way of verifying that the check has been left. They want to be able to get a receipt for their payments since there have also been problems with the posting of payments in time to avoid late fees. They also want to be able to interact with someone when they have to discuss payments and late fees which they feel are excessive and set up in a manner to cause extra payments to the University as a result of late fees which they believe are caused by the University's approaches to billing and some bill pay issues on-line. Furthermore they are outraged that if they owe money their Rocket Cards are shut off leaving them without access to some services and even the ability to enter their own dorm which requires the use of the Rocket Card

We agree with the students and do not understand why the Treasurer's Office has become off limits to students. By making it a self-service operation it limits the customer service that students have come to expect and want especially when it comes to something as important and sensitive as their bills and payments for the University. Granted the University is trying to move students more and more to the web and bill pay online as well as trying to shuttle them off to Rocket Solution Center but we do not believe this is working well or to the benefit of the University's service level. The most obvious message from the blocked entrance to the Treasurer's Office is a clear statement that the University or at least the Treasurer's Office does not want to provide some basic service in a person-to-person format which students want when it comes to their payments. We do not understand at all the University's decision to block off the Treasurer's Office from student access and strongly recommend that it be reconsidered. It sends a terrible anti-customer service excellence message and blocks students from conducting a basic service in which they feel a need to interact with a person. Some of the staff that work in the Treasurer's Office did comment that they are not at all happy with the situation either and feel they are giving students short shrift on service. They also are not happy being the object of so many student complaints and wish to be able to meet with students to help them.



When we tried to get information on the Installment Payment Plan by telephone and email we were referred to the web where we found not enough information to help a student or parent determine if the IPP would be the right way for them to go. There is no way to know how it worked or even what the fee is for using it as shown in the excerpt from the Treasurer's Office webpage below.

#### Installment Payment Plan (IPP)

The University offers an Installment Payment Plan (IPP) to make payment of tuition and fees more convenient for students and their families. Apply via the [MyUT portal](#). A four-month

payment option is offered for fall and spring semesters. A 3-month payment plan is offered for the summer semester. All fees are deferrable except the following:

- Installment Payment Plan (IPP) fee
- past due balances
- parking or disciplinary fines
- late payment fees
- service related costs from any campus office such as:
  - \*The Student Medical Center, (medical or prescription costs)
  - \*Residence hall lock-out fees
  - \*wireless telephone services
  - \*laptop lease fees

When we pushed to get an appointment with someone in the office to discuss the payment plan we were rejected and told to go to the myUT portal or Rocket Solution Central for more information. Rocket Solution central referred us back to the Treasurer's Office and to find information on-line. When we did look online in addition to the above we found scant information on how the IPP works and were left without basic information needed to get details about the process, the costs and the payment plan itself. We could fill out an application up for the plan through my UT but would not have enough information to know how it works.

We could not locate any written information on the IPP anywhere on campus either. The RSC had no information to provide and sent us to the web. If there are brochures on the IPP they should be made available in the RSC and at the Treasurers' Office even if they are only available in the wooden unit that blocks the entrance to the office.

Students also complained that the on-line billing process did not always work well and that was another reason they want to be able to leave a payment with a person to make sure it is made and recorded. They also want to be able to consult with a person on their bills and do not believe that they can do so even at the RSC which has the following as statement on billing on its website concerning billing.

E-billing is the University's official method of communication!

-Only online, will not be mailed

View your bill via myUT portal at <http://myUT.utoledo.edu> after registration

-Only students have access through their myUT portal

Students will receive notices about payments due at their UT email address via [firstname.lastname@rockets.utoledo.edu](mailto:firstname.lastname@rockets.utoledo.edu)

-Activity on your account may result in additional charges, check your account!

The only other information we could find on line for the IPP general information was:

**Installment Payment Plan (IPP)!**

The IPP enrollment form will only be available via the [MyUT Portal](#). The first payment due date for the Spring 2012 IPP is December 30, 2011.

The final installment payment for Spring 2012 is March 21, 2012.

When we called the Treasurer's Office at the number given 419.530.8700 we ended up not at the Treasurer's Office but a general phone tree that was the same as the RSC. And what's more, the phone tree does not work well either. When we pushed 0 trying to get a human we went into another phone tree that ended by telling us to push 1 to get back to the main menu. But when we pushed 1, the phone tree said this was not a valid entry. This is not at all helpful and discouraging service. It seems that the Treasurer's Office (and in fact many offices) do not want to talk with its clients. Moreover by shuffling calls to the RSC that only adds to the Rocket Solution Central's load which is already too much to keep up with the demand according to students and our auditing. The Treasurer's Office should answer its own phones and provide information to students and parents.

Again we have to wonder about the University's decision to make billing as well as bill paying a fully automated process when it is such a primary issue for students who want to be able to talk with a person about their bills and when we heard so many reports that the on-line billing process does not always work well. Moreover, this approach limits the access of parents who do not have access to my UT but are primary bill payers. They may not even be able to access the bills at all yet they are the ones who need access to the bills. It is realized that the University must have decided to cut expenses by automating the billing process and stopped mailing bills to the home but this may not be a wise customer service excellence, or billing decision. People need to be able to see their bills to be able to pay them and if parents do not have access to myUT how are they to get the bills efficiently. Granted the assumption is that students will check their bills and report to their parents but according to students this does not always happen and in fact the on-line billing is often wrong in any case.

Students and staff reported that the bill pay system was really involved in a major glitch back in August in which bills were not posted correctly. The students were left with inaccurate bills and most often did not have all their financial aid applied to their bills leaving them with outstanding balances. Since they believed they had paid all their bills they were surprised to get hit with late fees which mounted up since they were of the belief that their bills had been paid. What was worse was when students went to the Treasurer's Office they could not see anyone and had to find their way to the RSC which had not been informed about the problem so they too were working from incorrect information for their tuition and payment plans.

The on-line bill pay does not always work properly according to students as the following one reported. "I paid with on an online check and it seemed that everything went through properly but turns out it didn't when I got a notification alter that my account was put on hold so I couldn't register. And I did everything I was supposed to do too and it seemed that it went through but it obviously didn't. I got hit with a late fee too when I shouldn't have and I didn't have the money to pay the late fee which I should not have gotten since I did everything I was supposed to do and it seemed to go through. I tried to get it sorted out but no one in the Treasurer's Office would help and Rocket Central didn't help either so I got stuck with the late fees."

It also appears that some of the bills such as the parking fee are applied later than other bills so students check their on-line bills and it looks like they are fully paid but they are not because of late postings. This incurs yet another late fee which some students reported built up into the hundreds of dollars. It is the students' ultimate responsibility to check their on-line bills but the system is set-up in a way to make it appear that all is well when it is not. The system should send out an email to all students whose bill has been altered in any way to alert that that they need to look at the on-line bill to see what changes have been made. Better would be a mailed bill but we are aware that the University has cut these out.

One of the major problems with late fees and late posted bills is that if a student owes money they may get a notice that states that if they do not pay their bill immediately their Rocket card will be turned off. A number of students reported that they were sent notices that they were in arrears even when they were not due to a billing glitch. These notices stated that if they did not address the bill in 24 hours their Rocket Cards would be turned off but due to the delay in sending the notice, getting it and reading it, some students found themselves with non-functioning Rocket Cards and could not even get into their own dorms since the card must be swiped to open the doors to the dorm or buy food which they had paid for with their meal plan. This is not good service at all and we would recommend finding another way to put the pressure on students to pay. Having them locked out of rooms they have paid for or go without food is not tolerable customer service and will lead to attrition. And to make service worse, there is no way to talk with anyone in the Treasurer's Office to resolve the issue. At best, a student has to go to the RSC where he or she may or may not get the help they need as discussed earlier.

A problem with email notification of billing is two-fold. Students do not use their UT email as much as their own email and thus miss the billing changes. Two, it was reported that one reason that students avoid the UT email is it is too overly cluttered with unnecessary emails from the University. There is just too much volume to be able to find the billing emails for example. The University ought to review its email policies and cut back on superfluous emails to students so they might use and find important notifications.

### **Suggested Solutions to Treasurer's Office**

To begin with the Treasurer's Office should not be shut off to students. The university may be trying to make more and more students use on-line self-serve solutions but when it comes to a matter as sensitive as billing and moneys owed, students need to be able to talk to an individual and gain resolution or at least next steps. The move to close the Office and force people top the RSC is not working well either As was discussed earlier in the report, the RSC has its own problems and adding to its load is not solving any of them.

The wooden unit blocking the entrance to the Office should be removed and there should be a person available for students to drop off payments and get a receipt for them., the current situation with the formidable barrier is a clear statement that the Office does not want to meet with students which apparently it does not., This is an office that should work with students on sensitive personal issues dealing with payments to the University

and the cutting off of students from working with a person is extremely poor customer service. We would go so far as to state that this situation creates one of the worst customer service situations possible –denial of service. Students feel strongly that they need to be able to meet with a person at times especially when discussing a possible error in the bills or the need to work out a payment plan and these are denied them with the current situation.

We cannot urge the University strongly enough to replace the drop off system with at least one person to receive students and their payments plus provide a receipt for the payments. We are aware that the University is trying to get students to self-serve on billing and payments but from the reports from students and staff, this is not yet working and may need a better transition with people providing service to students.

Fee such as parking fees need to be posted more quickly so students can get a unified bill and not multiple bills on-line. The parking fees posting seems to be separate and that causes many students to incur late fees when they thought they had paid the entire bill.

The University also needs to find a better ways to notify students about changes in their billing accounts. The current system of using the UT email system does not seem to be working. Students either do not use the UT email or find it so jammed with what they see as superfluous emails that they do not see the billing changes. The University may wish to review its email use policy and cut back on some of the volume that is placed onto student email accounts. One possibility is to obtain the students' personal email accounts with their permission to send out billing information directly to their personal accounts. Another would be to text the students with changes in their billing status.

We urge the University to also make certain that students get a notification of whether or not the bill pay process was successfully completed. This could be a simple technological solution that would let a student know right after entering the bill pay by check information for example that the transaction did or did not go through. This would let the students know for sure if they have been successful in making an on-line payment and also provide a receipt for the transaction so the experience of the student above would not be repeated.

We urge the University to send printed bills as well as on-line bills to the residences of the students. Most of the students are getting at least some assistance from their families to pay for school but they cannot pay the bills if they do not have them. . It needs to be considered that there are students without computers at home and parents who do not use them. We were told by students that they do not all have computers and have to rely on the ones at the library and elsewhere on campus to do their business with the school so that too is an argument for mailing out bills. This would add to the cost of billing but would likely be offset by earlier payments and fewer collection charges from people who are not aware of their full bills. It would also likely lead to a drop in late fees which may cut into the University's revenue but these late fees are a major source of discontent among students who feel they are either unfairly applied or are a hidden way for the University to boost its income. They believe that the University has set things up in a way

to increase the number of late fees as a way to increase the cost of going to school and getting more money into the budget.

The practice of cutting of the Rocket Cards for students who owe the University money is not a good policy. It locks students out of their rooms and food. This is almost a cruel way to make a point that they owe the University money. Plus the way that students are notified is not sufficient. The time between the sending of the warning and the shutting off of the Rocket card is too close and leave many students getting shut off before they receive notification. This is extremely poor customer service and was mentioned by 27 students some of whom did not have any direct interaction with the shutting off of their cards but thought the University “cruel and heartless” in shutting off students from food for example.

### **Tuition/Fees**

Concern about the recent increase in tuition (which many students reported as being 8%) were frequent; however, when pressed, students who complained about the rising cost of tuition said they did believe the value of the experience at UT was worth the tuition charged. What seemed more troublesome to students was the ways in which their tuition dollars were being used. Some pointed to what appears to them to be a random allocation of funds to campus activities. One example given was the funding of events hosted by student organizations that are poorly attended yet continue to receive funding annually with no assessment of the relative value of the activity. Some students expressed concerns that the University was too focused on athletics, and some even questioned the need for “all the fireworks...that's my tuition dollars literally going up in smoke”. Still others complained about spending on performers coming to campus. A few students were concerned that university administrators received bonuses while tuition was being increased, making a direct correlation between increased tuition and the bonuses themselves.

Some students thought the billing process worked fine and that they had easy access to their bills, while others complained that bills are complicated, difficult to understand, and often have charges that do not belong on them, especially when the student has added or dropped courses. Staff noted bills were only delivered through email to the students' UTC addresses and parents did not receive copies of the bills.

Many students noted that closing the cashier's office made making payments difficult. Students are left to either pay online using MasterCard, Discover, American Express (but not Visa) and paying a processing fee or dropping payment by check into a drop box outside the treasurer's office. Students reported being uncomfortable leaving their payment there for fear the payments would not be properly credited or not credited on time. Most students who complained about this said they preferred to handle their bill paying face-to-face where they could receive a receipt for the transaction.

Students complained in various venues about the punitive nature of fees. Beyond parking fees, which apparently are not always added to the student's original billing but may be posted after the bill is sent to the student, students noted there may be late fees added to this and other fees on bills the students presumed they had paid. Rocket Solutions Center personnel confirmed that such fees could easily result in an overdue bill of \$200 to \$250 within a semester.

Many students noted that scholarships needed to be higher to make tuition more affordable for more students. Some suggested implementing a drug test as a prerequisite for qualifying for scholarships.\

Beyond what appears to have been an institutional breakdown in the Rocket Card system for freshman cards, students felt the Rocket Card system had not been thoroughly explained in terms of where it could be used and what the distinction was between a meal plan and dining dollars. Several instances of individual Rocket Card failures were reported, most accompanied by complaints about how long it took to fix them and some with complaints of being shuffled around among different offices, although we suspect in those cases students self-directed to the Rocket Solutions Center which was not the appropriate place to deal with this issue.

Several students reported that when there was a hold placed on their account, their Rocket cards were disabled. They complained of not receiving adequate notification of past due accounts and/or holds and were surprised when their cards did not work.

### **Scholarships**

Several students pointed to the current scholarship system as flawed, particularly in its favoring of local high school students, many of which in their perception attend UT only because of the first year scholarship. They perceive many of those students as being academically underprepared saying the University is recruiting in the wrong areas and should make more of an effort to help students with financial problems who are academically capable. A few students went so far as to say if the scholarships were awarded to more academically prepared students regardless of their high school of origin, fewer students would leave the University. Some were not aware there was a GPA requirement for the scholarship, but others who were receiving that scholarship reported that was the case. There was a lively discussion among the focus groups about the University's open enrollment policy which they claim creates its own problems allowing less-than-serious students to attend. They believe this practice has a negative impact on residential life.

### **Staff Issues**

Staff invariably expressed a desire to provide good customer service but felt that situation had developed at the University to mitigate against their being able to do that.

The staff said that there had been many cuts in staffing that left offices without the people necessary to provide good customer service. In the focus groups with the staff they stressed that there has been so many cuts in staffing that they simply could not provide service to the students. This they believe is part of the push to move almost all services to a self-serve on-line environment but they felt that move was not succeeding. "Even if you get 80% of students doing their own services on-line that leaves 20% who need or want to work with a person. The cuts in staff have been so severe that we just do not have the people to deal with the thousands of students who want to get help from a person" was a common statement from the staff. Other staff gave the example of cuts in career services, an important service area for students. They said that the staff there has been reduced from twenty to four and now have been given student employment as well. This limits the

services that can be provided in this important area. Considering that students come to school to get jobs and career services is an area that works with students to prepare them to get jobs, this is a serious cut to services to students.

As one staff member put it “the University has cut the budget so much and laid off so many people that we are stretched beyond what we can do. We also feel as if we are not supported and certainly not communicated with or consulted on changes that are coming so fast we can’t keep up with the work. We have just lost too many people to do the job and that makes us feel like we aren’t doing the job.”

This in turn leads to a morale issue that also cuts into the providing of good customer service. The staff we spoke with mentioned low morale on many occasions. They feel they are being asked to do too much with not enough resources. The result is that they feel underappreciated and over worked. This is a situation that cannot help but reduce the customer service they can and do provide. If staff feel they are not appreciated they will share that feeling with the students they are to serve.

The lack of staff has also increased the need to focus on the area that one serves in, This in turn adds to the silo mentality wherein the staff have to focus exclusively on their own area. As a result they know less about what other offices are doing and that leads to more shuffling of students from office to office as they staff think they are giving good advice but are not. Moreover as one staff member put it “layoffs have cut out some of the key contacts we had with other offices and departments. They are gone so are our contacts to learn what is going on and who to send students to. We used to know who to call but now we aren’t sure who does what so we send students to the wrong places. We don’t like doing that but we can’t help it.”

Moreover, the on-line University directory is not up-to-date. Some of the people who have left are still on the directory even though they are no longer with the University. Others have been reassigned to other offices. Their replacements if any have not been put on the web-based so the directory is of little value in trying to find people who can help staff help students.

Another source for the morale issue is that the staff feels there is just too much change happening too quickly without either their knowing or being involved. This added to the silo mentality and lack of communication about the changes has caused some serious lapses in service. When we were on campus, a new program named SAM was announced simply by fliers being posted to the doors at Rocket Hall. No one in the focus groups was aware of this new initiative prior to the announcement by posted flier. This program may be a good one since it is to help students get the accommodations they need on-line so they do not have to come into the office to get the accommodations they need. But the issue is not whether or not it is a good program according to the staff. The issue is that they had no idea that it was happening until the fliers went up notifying students and staff that the program was now in effect. The staff was informed at the focus group that an electronic memo would be going out soon to describe the new SAM program but this would be happening after the fact.



Staff report that they are often asked to carry out new changes in the way that the University is doing business and providing services to students but they feel they are not being consulted at all. The lack of consultation is not only an issue of not knowing what is going on but the roll-outs could be better completed with assistance from the users of the new programs. There were numerous automated service roll outs that were cited by staff to support this point from the parking system to wait listing to the new SAM program. They also cited their perception that too many of the programs like the parking system had glitches that were not taken care of prior to roll out and they could have helped solve some glitches if they had been involved in the process of reviewing the new programs. Staff feels alienated by the rapid pace of change and believe that their ability to deliver good service has been affected by the changes.

Staff cited the timing of roll outs of new self-serve program also, One that was mentioned a few times was the new payroll process that was launched in the Fall, the busiest time of the academic year. This they felt was poor timing when they had to use the new system on

top of all the other work they needed to do to get the semester off to a good start. “Why couldn’t they have brought it out in the summer when we would have had time to get used to it and get some training on how to use it? They never seem to consider the staff when they create these new things for us to do.”

Another staff service issue that programs are rolled out without training so they cannot help students who are to use the new programs. can be seen on the SAM flier where it states that “for training visit [www.utoledo.edu/utlc/accessibility/sam/help.html](http://www.utoledo.edu/utlc/accessibility/sam/help.html).” It needs to be stated that when one clicks on this html url it is not a training site for staff but a how to use SAM for students so it can be said that there is no training available for staff in the use of SAM. This in itself may not be a big issue but may be emblematic of the staff assertion that training is not provided for the use of new self-serve program that they may be asked about. It is of interest to note that one of the members of the accessibility staff did also complain that her office and she were not trained on the use of SAM prior to it being rolled out nor were they consulted on whether or not they felt that this would be helpful to students and them. The staff asserted that they felt left out of the loop on training and are made to feel foolish when they cannot either answer student questions on how to use a new technology or cannot.

We fully realize that there are times when the University administration decides it needs to roll out a new self-serve technology to help itself and it believes students to gain greater access to services. These technologies may in fact be of value to students and even to staff. But, in an academic environment there is a belief that there will be consultation and involvement with those that are developing or deciding on the new technologies and the users of the technology. The academic community is one that prizes communication and consultation so it was not surprising to us that there is distrust among staff toward the administration when they are not consulted on programs that might affect their work and work life.

It appears that like the faculty there is a suspicion among staff toward the administration which they feel “is trying to run the University as if it were the medical school.” They cited on numerous occasions that the leadership came from the medical school and they are making decisions as if it were what they perceive the medical school to be run like. They are not pleased about this either. As one staff member said to the nods of many other staff members “They just dream up a new idea and just slam it through like this is the Medical School where everyone just says aye aye and moves on. They just come up with an idea and we are going to do it so either get on board or get out of the way. This is an academic university not the medical school where they just salute and move ahead.” This suspicion of the administration and its procedures may cause resentment against the new programs that are rolled out. In turn the staff does not support the new on-line self-service programs and may actually work against their success as a protest against the administration. It certainly does hurt morale and a weakened morale will always lead to weakened customer service.

Finally, the number of IT professionals appears to have been reduced according to the staff and faculty we met with. We could not verify this but we did learn that here have been

reductions in IT professionals assigned to offices and departments to meet their specific needs. A reduction in the number of IT professionals at a time when there is a move to put more and more services on the web is not a practical idea. In fact, with the increased use of web-based self-service there will be a corresponding need for more IT professionals.

Some of the problem may be that the staff believes there have been cut backs in IT professionals since many have been re-assigned and no longer are specific to particular offices or departments to help solve problems when they come up. It appears that IT resources have been pooled and that meant that some people lost their direct contact to an IT professional who had been dedicated to them. "We had a tech but now he's gone. Now we don't know who to call when we have a problem and we have plenty of them. When we have a problem we are left to try and solve it or find out where we go to get it solved. They may want us to use more on-line solutions but that can't be done if we don't have the tech support we need."

### **Suggested Solutions to Staff Issues**

It strongly appears that the pace of change is becoming too great for the staff. The staff seem to be overwhelmed by the pace of change and are beginning to push back against the self-service technologies and the changes that are coming from what they believe is an administration that does not understand them and "their academic campus"; a situation similar to the distrust found in faculty toward the administration.

This is magnified by the lack of communication of changes that may make it appear that they are coming down from the administration without consultation and training. It would be our suggestion that two things occur.

The first is to review the plans for any new implementations of changes in service that could be held off for a while to slow the pace of change. It does appear that there is a great deal of change that is taking place and it simply might be too much for the staff to be able to accommodate. If a new technology or change can be held off for a while it may be to the University's benefit to hold back on it to allow for the changes already taking place to be assimilated and let the staff settle down a bit. It appears that they are struggling with the pace of change and that does not build good service to the staff and they in turn to students.

The second is to increase the communication about changes significantly to make certain that staff can be aware of potential new systems or self-serve approaches that are being contemplated or even implemented. One way to do this is to make certain that every potential change is published in the University's staff and faculty news well in advance of any potential change. The new changes should call for comments by the staff and faculty too during a period of open discussion time. This will allow the employees to have an opportunity to become involved and feel as if there is a request and venue for their thoughts to be heard.

This can also be done by an intranet that is specifically designed as a change information

communication or a web page that lists all new changes under consideration with a description of the changes, who might be affected and the potential timing for the changes. There could be a response systems set up in the intranet to allow for people to comment and at least have an opportunity to be heard. This could communicate the changes to the campus and at least provide the feeling that input is being sought.

When a new system or self-service technology is put into place there should be enough time for staff to receive training on the new changes. The staff feels inadequate when they do not receive the training that they need. That can and will lead to a diminished level of service if they cannot help students learn how to use the technology.

The on-line directory should be reviewed and brought up to date. This may seem like a small thing but to the staff it is emblematic of the problem of change and layoffs. It is of little value if it is out of date and people cannot find who they need to on the directory. Staff need to feel as if things are working correctly and the directory is just one small example of the “fact” to them that there are changes taking place to rapidly for the University to keep up with them Or as one staff member put it “if they can’t even keep the directory up to date because of the changes and layoffs why should we trust them with bigger stuff?”

We have to believe that the lowered morale among the staff is affecting the service provided. It needs to be addressed after the fast pace of change and the numerous lay-offs that have cut the number staff. This area like others in the University already mentioned such as advising, career services and the Treasurer’s Office needs a certain core body of people to be able to make service work. If there are not enough people to handle the number of students, students will not be served well. It may be a point at which the University needs to look at whether or not it has reached a tipping point in the reduction of staff that will harm customer service to students that cannot be replaced by self-service technologies. There is a need for actual people who can provide the services that students need and want. It needs to be remembered that there will always be students who will not wish to use on-line self-service and if there are not enough actual people to staff the service they are seeking, the level of customer service excellence will drop. the administration needs to build a level of trust with employees to increase customer service for and from the staff. Simply put, ill effects from the merger continue to hurt service levels at the University.

If there has been a reduction in the number of IT professionals while there is a corresponding increase in the use of technology solutions to eliminate people and improve customer service, there may well be a mismatch here. Considering the number of times we heard of glitches in the technologies that the University is implementing from cashiering to parking to payroll glitches it could appear that either the programs are being rolled out when they are not perfected or there are not enough IT professionals to make sure they are implemented properly and maintained correctly. It may be that the University will need to hire more IT techs to be able to keep up with the new programs so that technologies that are meant to increase service do not decrease it instead.

Finally we are concerned that the morale and other issues have harmed the staff's attitudes toward customer service. This is especially so since the merger is still quite alive today in the minds of the staff who blame many of their service and other concerns on it. We cannot help but believe that with somewhat depleted morale since then the staff has lost some of its dedication to serving students especially as there have been layoffs and a pace of change that they are not comfortable with

Staff report that they are still quite focused on providing good service but we did notice in our encounters with a number of staff in their offices that the service they provided was sub-par at times from the RSC to financial aid and the registrar's office. We recommend that all staff undergo additional customer service training to improve the level of service provided.

### **Parking**

Simply put this was the most common complaint from students and of course the commuting students. There simply are not enough parking spots on campus to accommodate all the students during the crunch times.

When we tried to find parking spots we had to keep circling the lots as did all the students. We had significant difficulty finding parking places for us to be able to go to the areas we were auditing. This situation is the common reality day and night.

There are no visitor parking spots near Rocket Hall for potential students to be able to park and meet with admissions or with any other office in Rocket Hall. Even if one were going inside to get a parking permit for the day, there is no place to park to be able to enter Rocket hall and get the permit. In fact, if a non-student were to park in Rocket Hall he or she could be open to getting a ticket which is a terrible way to say welcome to a student and/or parents who are considering the University. We knew that we could be risking a parking ticket by parking at Rocket Hall lot while performing the audit but we also knew that the parking enforcement system was not working so we did not have to worry at the time while we were getting a parking permit to put on the dashboard.

The lack of parking places or at least the difficulty to find a space has made student question the \$120 per semester charge for parking. This fee is especially onerous to students on a football game day when they cannot even gain access to some lots. This is a source of anger and a clear lack of service priorities to the students when they are displaced by an athletic event on a Tuesday when they already have significant problems finding parking spots.

We have already discussed the late posting of parking fees that lead to some students being assessed a late fee for their parking payment but this is an issue that gets lumped into parking on the campus and needs to be addressed as discussed above.

### **Suggested Solutions to Parking**

There simply are not any good solutions currently to parking at the University. But we do recommend that no additional spaces be taken away such as is happening for the construction for the Dorr Street Gateway Development in the Rocket Hall lot. There are not enough spots for all the cars on campus as it is.

If the money ever becomes available we would recommend the building of some additional multi-level parking garages on campus to accommodate the number of cars that come onto campus every day.

Though it will be unpopular with football game attendees and we realize that the games are possible sources to raise funds from attendees, we do not see the closing of parking lots to students who have paid for them as a good service piece. These lots should not be closed to students at any time.

Finally, there needs to be a group of visitor parking spots set up for Rocket Hall at the very least. There does appear to be some visitor parking at Ottawa Hall but it is not handy to Rocket Hall, is hard to locate and all the spots are taken up by non-visitors. Moreover, the sign says that an A or C permit is needed so there is some question if one can park there at all when a visitor. The natural location for visitor spots for Rocket Hall is in the Rocket Hall lot.



These spots could be placed along the sidewalk to the right of the entrance from the parking lot to accommodate people coming to meet with admissions and other offices they may need to consult with at Rocket hall. We realize that reducing open spots for visitors sounds possibly counter-productive we do not believe it is. This is because the visitors are parking in the lot and taking spaces anyhow right now. The difference is that without a visitor spot the people coming to meet with admissions for example have to park illegally and could get a ticket when the parking enforcement system is working.

The admissions office could control the parking spots by giving out parking passes when someone comes into the office to meet about applying as they are already supposed to be doing but did not for our auditors.

### **Signage**

The signage at the University is a mixed situation. There is good signage for driving from building to building but once onto the campus it is difficult to navigate from building to



building. There simply not enough “You are here” signs with maps to find one’s way around the campus. There are some campus maps scattered around the campus but there are not



enough of them. Moreover, there are no “You are Here” indicators so it is still very hard to find one’s way from building to building because the map is also quite compact and small. Furthermore, the maps show all three campuses on the main campus which is not necessary. The person is on the main campus for example and wants to find his or her way around that campus so the other maps are superfluous. If the other maps were removed, the map of the campus the student or visitor is on could be enlarged enough to make it easier to read.

Interior signage is quite mixed and depends on the building as to how good it is or even up to date. The best interior signage is in Rocket Hall where there are numerous maps with you are here indicators. The interior maps are clear and precise allowing a person to find his or her ways around without much difficulty. As can be seen in the photo below the maps are reinforced by wall directions showing how to get to service areas within the building. The maps are also color coded to help differentiate between service areas and classrooms which is also quite helpful. Moreover, the wall maps in Rocket Hall also have a directory of the rooms and functional areas to help reinforce the ability to find one’s way through the building. These are good maps and quite helpful whereas some of the interior maps found in other buildings were not as good and may even not be up to date.



There are even buildings in which it was not possible to find a floor plan such as in University Hall and this makes the ability to navigate to offices very difficult. The signage in the Union is also difficult to use because some of it is wrong. For example it has an arrow pointing off for the bookstore on the third floor but the bookstore is on the first floor. The signs in the Union need to be reviewed and corrected.

### **Suggested Solutions to Signage**

There are additional campus maps needed within the campus itself. We did notice that there are some informational boards that are underutilized that could easily be turned into campus maps with “You are Here” indicators. One such informational kiosk board is below and is located where a campus map should be just off two parking lots. Having campus maps near parking lots is an important signage service since this is where people are just entering the campus and need to get their bearings.



There are other informational boards that could easily be adapted to become campus maps and we recommend that this be done.

The floor plans in Rocket Hall should become the template for all buildings. Every building should have floor plans near the entrances to the building so students can easily find their way to where they need to go.

### **Housing**

Three focus groups were conducted with students in Crossings, Park Tower, and Carter. Attendance ranged from 14 to 22 students. Hall directors had prepared well for the focus groups and did a good job of recruiting students to participate. Pizza was provided. According to one Hall Director interviewed prior to the focus group, students choose which residence hall they want and can select a specific roommate or identify characteristics of the type of roommate they prefer.

Students were generally pleased with the housing situation, the RA's and the learning communities within the dorms though there were some dorm specific issues that could be addressed. There was also a general feeling that the cost of a dorm was high especially coupled with the meal plan. This could be a continuation of the cost consciousness that we found in UT students or it could be an indicator that the dorm is not being valued at the cost paid.

The students in all the dorms complained of two technology-related issues. There were not enough working open computers in the dorm so to use a computer if they do not own one they have to go to the library. The students also complained that the wireless and Ethernets were very slow. There just is not enough bandwidth for all the students who are trying to use it. This leads to slow and broken connections when trying to use computers in the dorms. Reportedly the dorms only have 800 gigabytes for all the users in the dorms. When that is divided by the number of people on the system at the same time, that is a low connection which is also one that is not reliable.

The students in University housing said that the cafeterias were okay but not great. The students complained that there is just too much repetition in the menus." They have the same food over and over and it gets old real quick. I mean how many days can you eat burgers?" Some students also brought up the question of the cost of the meal plan especially when there is very limited service on weekends.

Students also reported that they found the FROG (First Year Resident Orientation Guide) program to be helpful. Having a group of peers looking out to help them as they moved into the dorms was extremely helpful. We would suggest that the FROG program ought to continue throughout at least the first semester. The FROG volunteers could be given distinctive shirts to wear other than the tee shirts they had during move in day so they could be spotted anywhere on campus. These shirts could be labeled with a tag such as "Ask Me" to help identify the user as an ambassador to help students and others with questions and directions around campus. They could act as ambassadors to the freshman who are trying to learn their way around and their way through the system. They would serve as reference points on campus who need assistance. They could also be helpful to non-students who are trying to find their way around and are having difficulty due to the lack of signage on campus. We were lost numerous times on campus and if there were an easily identifiable ambassador/helper that would have been very helpful to us and we have to believe to others as well.

#### *Park Towers*

The major complaints from students were the bathrooms especially in Park Towers, excessive heat and lack of computers. They complained that there were too few working showers for example. That the shower heads were clogged or not functional and that the water is just not hot enough to get a good shower. There were also complaints that the bathrooms were allowed to get too dirty and the cleaning once a day was perfunctory and left the bathrooms still not clean.

The students were unanimous in their observation that the dorms are too hot. They reported that the rooms get in excess of eighty degrees and in Park Towers they cannot open windows to cool the rooms off. They said that the lounges get even hotter and this makes for an uncomfortable situation. It would appear that the air handling systems may not be adequate to keep the dorm at a more pleasant temperature.

Some students stated that in Park the bunk bed set up is not as good as it could be because the beds do not have side railings to keep one from rolling off from the top bunk.

The students reported that they really liked the learning communities that are in the dorm. They give them a sense of community, of belonging to something larger more than just having a place to sleep and study. There was some concern that the law and politics learning community only exists in park and they will lose out when they have to move to another dorm where there is no law and politics learning community. The students would like to have this learning community beyond Park Towers.

### *Crossings*

The features that students identified in each dorm were somewhat different. Crossings students said their residence hall was convenient to classes and that there was food in the building. They enjoyed residential life because they did not have to worry about paying monthly rent to live off campus, had access to a computer lab and found the RA's supportive and the staff friendly and helpful. Some students here reported feeling safe while others strongly disagreed and pointed to some security issues as the reason for their lack of confidence in this area. A couple of incidents were referred to and the group was evenly split in terms of having prior knowledge of some security breaches. Students agreed there should be more updates when there are issues. Students also pointed to the fact that there used to be a security guard, but that is not the case anymore as another reason for their not feeling safe. Complaints specific to Crossings included smelly water, slow and inadequate hot water supplies and the high cost of dorms. Students suggested there might be scholarships to help pay for housing, and some of the young men here agreed a basketball court outside the dorm would be nice.

### *Carter*

Students at Carter said they preferred Carter because the rooms are bigger than other residence halls, but that the smaller population (Carter has 532, Crossings 606, and Park Tower ) made the dorm feel "like home". Students made note, though, that the food quality is inconsistent, too expensive, and that they preferred to eat at Ottawa where there was "amazing food". Food in Carter was deemed greasy without appealing options and would benefit from more variety and better seasoning. They noted that the online menus were hard to find.

Students at Carter also found RAs helpful, noting that they were "really open, peers/friends" and that there was friendliness on the floors that other dorms did not have. Some students noted that some floors are noisy, and some RAs are not enforcing quiet hours.

In each of the dorm meetings, students pointed to the LLCs as a major benefit. In Carter, where Health Professions is the focus of the LLCs according to students, they enjoyed the interaction with students from other majors who also lived in the dorms. Students said the LLCs made it easy to connect with people in their major and easy to ask for help.

Carter residents did note that the communal showers/bathrooms are a major issue and having them not cleaned on the weekends was "disgusting". Water pressure is low, there is limited hot water, hair all over the floor, the shower heads come off, shower curtains do not fit the showers well, and there are not enough showers for everyone. Students did not care for the desks in some of the rooms that only had one draw and others complained that mattresses were "horrible". Students also complained that the rooms were too hot most of the time and that having only ½ windows did not provide adequate circulation. Internet connections are slow and unreliable in some areas, and the wireless network goes into timeout in 15 minutes which creates problems when students are taking tests or scheduling classes and doing other business online that takes longer than the 15 minutes. Students noted there were four (4) public computers, but that most of the time only two (2) were working. Also lacking were an adequate number of washers and dryers (there are 5 for 532 students) and no change machine available. The elevator on the East side (?) of the dorm has broken down three times this semester, one time leaving a student stuck in the elevator for an hour.

Students here reported that the Pod (food service) should be open earlier on the weekend and have a better variety of fountain drinks. They said the food quality needed to be more consistent.

Overall, students at Carter rated their dorm below average (“sucks compared to Ottawa and Crossings”). Still, most of the students in the group returned to Carter because it felt like home and had strict security. Students here commented that one of the institution’s assets is the diversity of its population. Also listed among their favorite things were friends, friendships made and the rich history of the University, the pharmacy program and its faculty, Carter, tutoring at the library, Greek life that provides a lot of activities for students, activities/clubs, the performing arts building, the rec center, caring faculty.

### **Suggested Solutions to Housing**

Bathrooms need to be attended to especially to insure that both plumbing and hot water are available at all times to students. If a shower head is not working it needs to be replaced. Hot water is something that students feel should be available at all times so it needs to be supplied.

The bandwidth needs to be increased for the dorms. This is not only because students find the system to be slow and not reliable but because it is a necessity. More and more faculty will be using Blackboard for teaching for example. Right now faculty use Blackboard to provide on-line exams for students and if the students cannot use the computers because of lack of bandwidth causing slowdowns and shutdowns, this is defeating the purpose and causing students serious problems. Moreover, as the University is moving more and more to on-line self-services students need to be able to access those services from their dorm rooms. If there is not enough bandwidth, they cannot do that. This is not good customer service to demand that students do self-service on-line yet not supply the bandwidth needed to get to the services.

The number of open, working computers in the dorms needs to be increased and they need to be functioning for students who do not have their own computers. There is a belief that students all have computers but many reported that they could not afford to get their own and rely on the University computers. In the dorms this is a problem because around 80% of these computers do not function properly. These computers need to be replaced or at least ungraded and fixed so that dorm students can gain access to them to get their work done if they do not own a personal computer. Along this line, it may be worthwhile for the University to develop a plan that would allow students to purchase computers at institutional prices and with a longer term payment plan to get more computers and laptops into the hands of all students. We are aware that there is a Library laptop loan program but there are not enough laptops available for the number of students who want to borrow them at all times.

If there is a way to increase the variety in the food served in the cafeterias that would also be very helpful. We did eat in University cafeterias and the quality of the food was okay but we did notice that the menus are quite repetitive with minor changes each day. The

students find this to be a situation that makes them wonder about the cost of the meal plans. They want greater variety and feel they are paying for it but bit getting it. We can see after just eating in cafeterias for four days that the menu could get very boring very quickly. The staff were generally friendly and quite fastidious about food safety as seen by the gauging of the temperature in some of the food to make sure it complied with health standards in the cafeterias though we did encounter some who were brusque with students.

### **The Library**

The library is a very busy and crowded place which did supply some very good customer service. We did note that every working computer was being used by a student. There were



Six computers were out of service when we were on campus. These should have been fixed within the four days we were auditing the campus including the Library considering there is such a high demand for the computers. We did note that with all the computers in use there were students standing around waiting for a computer to open up. Every effort should make sure that there are enough computers for the students who need them and fixing non-functioning ones is a place to start.

When we asked about using the on-line catalog we were sent to the reference desk where we were given excellent customer service. We asked about a specific book and the reference librarian looked it up. He found that the library did not have the book so he automatically looked for it elsewhere. He found it in another library and offered immediately to do an inter-library loan. This was excellent service.

### **The Web and Email**

The UT website was a point of irritation for many students and we found it difficult to navigate

as well. The website was reported as being “challenging” to navigate. Staff and students pointed to the number of clicks needed to access information. One staff member pointed to a University of Miami study in which it was determined that a maximum of 3 clicks is preferred for accessing information.

Staff said it was difficult to find what you need on the website as many search terms did not return information even closely related to what was being sought. Staff validated student concerns that much of the information available (both in various offices and on the website) was out-dated. One participant reported being part of a project in process to explore websites of schools with one-stop services to identify best practices.

One of the primary reasons for this is that the search engine that is used does not work well. For example, when we entered a search for the Treasurer’s Office this is what we got.

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The office that we specifically asked for was the eighth down in the search which had focused on the word office rather than treasurer’s office. This is a common event when using the search engine on the web. In fact, the search engine issues were the top compliant about the web site. Most people said they simply skipped the web search engine and used Google to find what they were seeking.

The sight also suffers from simply having too many layers of pages before one can get to the information being sought. Some of this has already been discussed as an example of issues with Rocket Central Solutions but is common to other pages on the web as well. There are simply too many pages to get into what is being sought and they are not at all laid out intuitively or with complete information. This was shown in the report section on financial aid which left out too much information to be able to apply for financial aid properly.

It is good that the UT website tries to embrace social media but there is an issue with the media being timely and relevant. For instance on the home page there is still a listing for #whyUT – Fall Campus Preview Days. This is a good PR piece for the University but needs to be up to date and it is not since the Fall preview days have given way to the reality of it being December.

There were several complaints by students that led us to ask the student focus groups about their use of UT email. Students reported being inundated with emails making each of them less valuable in their minds. The said it would be better if important communications were sent by postal service or a phone call (for example, bills, incomplete financial aid processes, overdue bills, etc.) In fact, students complained about the timing of bills altogether stating bills and late fee notices often arrived too close to the deadline (if at all). Admittedly, this may be a function of the way students prefer to use their email accounts; however, UT should be sensitive to how their population prefers to be communicated with and seek alternatives that will facilitate strong communication with students. Some students suggested there should be a way to opt in (or opt out) to self-select the types of email correspondence they preferred.

### **Office Hours**

It was noticed that most every office closes by 5:00 except for Rocket Central on two nights. This places evening students at a disadvantage because they cannot get to the offices to take care of business they need to. There is a large percentage of evening students who are working full time to pay for school and families,. Their workday does not end in timer for them to be able to get to the offices and bookstore prior to closing hours. That means they have to leave work early to get to take care of issues that require them to interact with an office on campus. The University needs to find a way to open offices later than 5:00 so evening students can take care of their business without missing work.

### **Summary Statement**

It is the nature of a customer service audit to locate and pint out as many issues and problems as one can find to alert the client institution of problems they need to and can deal with o increase the level of customer service to students and others. And it would appear that we have fulfilled that requirement of the study. But it is important to note that there also appears to be between a 72-78% satisfaction with service rate at the University. In fact, this report was made more complex because the university does do many things correctly as noted in the opening of the report.

This is not to say that The University of Toledo does not have issues to work with and improve. It does and we hope this report and the strategic objectives it lays out will be helpful in that effort.