

University of Minnesota Morris Digital Well

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Planning Committee

Campus Governance

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### Planning minutes 11/28/2012

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# Planning Committee

## Wednesday, November 28, 2012

### Moccasin Flower Room

**Present:** Michael Eble, Julie Eckerle, Jim Hall, Arne Kildegaard, Jane Kill, Margaret Kuchenreuther (chair), Leslie Meek, Lowell Rasmussen, James Rook

**Absent:** James Barbour, Charlie Cain, Sarah Mattson, Jordan Wente

**Guests:** Jill Beauregard and Jacquie Johnson

- ◆ Reminder that Peter Radcliffe from the Office of Planning and Analysis will be at the Dec 5<sup>th</sup> meeting to discuss the comparison group progress.
- ◆ Jacquie Johnson distributed a hand out entitled University of Minnesota, Morris One-Stop Office Proposal (attached at end of minutes.)

This is the third time the one stop has come before this committee. The hand out includes a definition of what a One Stop Office entails, and questions brought forth last spring by both this committee and the Finance Committee. It addresses what the problem is a one stop could possibly fix, staffing of the one stop as well as the staffing issues in Financial Aid, SE&E budget, reporting structure, and location possibilities. (Space on this campus is available, just not the best workable. This is likely due to our "historic" listings.)

The increase to a third staffing position is possible from Financial Aid and redistributing duties to current employees. In addition, the dollars allocated ever year from the federal government to administer financial aid programs such as overseeing Pell Grants, etc.

Last spring the Regents were asked for a modest increase in student fees and though these monies would not be used to help fund the third position, some may be tapped into to help fund the SE&E budget. Some of these funds, however may be used to help support an expanded cadre of campus tutors. These monies must be used for student support. It cannot be used for instructional purposes. This is Regent's Policy.

There are preliminary designs reconfiguring first floor Behmler. These designs utilize the current Behmler Hall conference room and the current space occupied by Financial Aid. The designs would not take space away from the Grants Development Office.

- ◆ Jill Beauregard mentioned that last spring beside the Finance and Planning Committees the group also visited the Student Affairs Committee.
- ◆ Leslie Meeks brought forth a concern regarding hours of the One Stop. Would there be a possibility to extend the office hours to later in the evenings as students may tend to visit after classes. The concern was there might not be enough traffic between for example 8:00 am—10:00 am.

Jill Beauregard responded that other models remain open until 5:30 - 6:30 pm but traffic is busy during normal business hours too. Financial Aid already extends hours during registration, orientation, Community of Scholars, and other like events. The one stop would continue this practice and be open weekends of orientation, Community of Scholars etc.

Jacquie Johnson mentioned that early in her time here, there were offices that had window hours until 3:00 pm but are now staying open until 4:30 pm for this same reason.

- ◆ Michael Eble wondered architecturally if walls and other configuration of the first floor in Behmler Hall could be moved. He also wondered if the concept included windows. He definitely dislikes that possible concept.

Architects are currently working on conceptual designs. We need to remember that was once a gymnasium, so there are pillars (and we know where they are) but other structural issues are minimal.

Jacque Johnson mentioned that “windows” are not ADA compliant. In addition, the hope is to have an open welcoming space. Grants Development would have a different entry designation, easier to find. The floor would no longer be the current maze.

- ◆ Margaret Kuchenreuther asked if the first floor would be the only area being changed?

Jacque Johnson reiterated the plan to renovate the Business Office area on the second floor. This is not part of the one stop plan.

Lowell Rasmussen said it makes sense to do the renovation of both spaces at the same time. Part of the driving issue with the Business Office is handicap accessibility. We are not compliant and have been sighted on this issue as well as the issue of the way cash is handled. We need to change configuration for both cash issues and handicap compliance/privacy. He will bring in the preliminary plans for this committee to view.

- ◆ Margaret Kuchenreuther wondered if there would be staffing changes to either the Business Office or The Office of the Registrar?

Jill Beauregard talked about how the monetary question was raised last spring. It made Jill readdress the issue to see if the one stop could be done “budget neutral.” Jill thought about this and with Lou Logan retiring and Andy Sharpe leaving to take a different position, she concentrated on how to reassign duties in Financial Aid. Jill has some administrative funds she is willing to pay a financial aid person and by doing so, it then frees up dollars to go toward the third staff member. Doing things this way would make the plan budget neutral.

Jacque Johnson also addressed Margaret’s question stating there would be no added staff or reduction in staff to either the Business Office or The Office of the Registrar.

- ◆ Arne Kildegaard asked if there would be any dove tailing with academic advising?

Jill Beauregard responded that Tara Winchester and Lori Kurpiers are the current acting one stop people. They have been invited to several groups/committees and asked how the one stop could help that particular group/committee. If a student comes with various questions, it is great to be able to say go to the one stop office. They can help and direct you and address your needs. This is the way we need to serve our students now. It is a holistic approach. The one stop covers and intersects many areas.

Jacque Johnson reiterated the fact the one stop office does not have the intention of taking over any part of the advising office. The purpose of the one stop is to improve our student service, but it will also benefit faculty/advisors. This office will not duplicate or interrupt any of the advising pieces.

- ◆ Jill Beauregard stated that right now the big question is where does a student start with whatever question. Does a student start at the Business Office, the Financial Aid Office, or the Office of the Registrar? Having a student one stop that can be the starting place.
- ◆ Arne Kildegaard asked if there was any thought of including Academic Advising/Brenda Boever.

Jill Beauregard responded that Brenda is not part of this project.

Jacque Johnson stated that co-location on campuses is a wonderful idea. However, due to our building constraints it would not work here.

- ◆ James Rook wonders how the student fee would be used. If the estimated SE&E were between \$10,000--13,000, how much of that figure would be one-time expenses, for example computers? In addition, with one-time expenses is the SE&E figure likely to change over the course of time? Is that something that could maybe lower the student fee in time?

Jill Beauregard said that the SE&E figure is really an estimate. It is not something known at this time.

Jacque Johnson added this figure would not use all of the student fee monies. MCSA will also have some input as to where/how these funds are used. It could go to places such as extra tutoring for classes that have high rates of need, and improve areas of student learning.

- ◆ Margaret Kuchenreuther mentioned that she had received an email from Clare Dingley in regards to APAS and how that will be handled. Clare is concerned about this. Clare feels the main function of APAS needs to remain in the Office of the Registrar. Clare also feels that the one stop could use the APAS as advisors do. That you cannot change the APAS but rather how it is looked. These are the implications the APAS indicates.

Jill Beauregard responded stating one stop has no access to APAS. However, for a long time Financial Aid has used a different tool, which indicates if you are on track with classes, payments, etc. There are schools that do have APAS availability. However, our main goal is to get the student out in 4 years. That is when their financial aid stops.

Margaret Kuchenreuther said the email indicated that Clare felt the one stop counselors would have more control over the APAS. Clare felt there had been some disagreement over this issue. Margaret feels the APAS is the tool for advising. You can look at the GPA and see if it is high enough to graduate, or if you still need credits to graduate, or is there an outstanding internship that needs to be completed etc.

Jill Beauregard responded the one stop is not an office that will be taking over other people's jobs. The office would be the communicator and the tool.

- ◆ Jane Kill wondered if this office would work mainly with freshmen and sophomores as the hand holding time should be over by the time the student is a junior.

Leslie Meek expressed that strange things happen. In addition, when meeting with students on every level you need to be able to say here is one path, or another and yet another. This is how things can impact you.

Jill Beauregard reminded us that UMM has many first generation students and with each situation questions change, but they still need help. Many of these students have not been taught about finances and student loans etc. This time is really not a handholding situation, but rather a time to help a student grow and graduate with the most tools we can offer.

Jacque Johnson contributed that students can go to one office and get an answer, go to another office and get a different answer. In addition, a student can receive part of an answer from one office because that office only deals with a certain portion of the issue or does not have the authority to expand on the answer. Jacque feels we have an obligation to provide our students with one definitive answer.

- ◆ Lowell Rasmussen reminded us that the 4-5 year graduation rate has yet to be met, as well as other goals we have not met. The student one stop could help find insight as to what makes a student successful or what impedes a student's success? Right now, we have people that work in offices, which tend to part of this issue, but currently there is nowhere that looks at the whole picture. At the end of the year Lowell would look to Jill for reports as to what is happening and why.
- ◆ Jane Kill then asked if a student comes and says they want to leave UMM, should they be sent to the student one stop?

Jill Beauregard continued saying even Jen Hermann is interested in having people start with the one stop. We need to remember it is the one stop that can give the student the whole picture; what kind of a bill you will be left with, etc. The student isn't necessarily being sent to multiple offices and maybe never ending up seeing Jen. Currently Tara and Lori have been working on who still has outstanding bills for fall 2012 and why? They are being proactive with things rather than reactive.

- ◆ Margaret Kuchenreuther mentioned that if students haven't paid their bills they aren't able to registered for spring semester. Most advisors don't see that as part of their job, making sure students have paid bills etc.

Lowell Rasmussen continued with the vein that students who haven't registered for spring semester go home and do they come back? Issues out there.

Margaret Kuchenreuther agreed because if the student hasn't registered, what classes are available at that point?

Jill Beauregard added that the one stop might be able to help find options for paying the bill, loan counseling etc.

- ◆ Arne Kildegaard asked if it was known from institutions using this one stop model, are there any concerns about vesting too much information, about vulnerability to the institution as a result of too many functions being vested?

Jill Beauregard stated it goes back to communication and explaining. The staff would have some power to lift holds such as late fees, installment fees and some authority for professional judgment. However, a lot of the information is view only, the authority would go back to the "home" office.

- ◆ Arne Kildegaard added that staff would have access to records. There is damage, which could be done from that.

Jill Beauregard said it all goes back to FERPA. That is the first thing all employees do, take the FERPA training.

Jim Hall reiterated that FERPA rules applies to Computing Services also, though they don't have access to a lot of student information. However if the concern is having people with more access to information, the value is offset by what is brought to the students. That a student can have one place to go to get answers is positive.

Jacque Johnson added on the FERPA level, the Business Office has students talking in the hall about private matters. We are not designed for a private conversation. It doesn't seem right to have a student exposed discussing private matters.

Jill Beauregard mentioned access to student information has been in place for a long time in financial aid and it was used only to help in whatever way possible. Every student's situation is different and the need to be able to have those conversations in private vs. public is important.

- ◆ Jane Kill asked Jill if she feels the one stop may be overloaded?

Jill Beauregard stated she is excited to be able to serve students this way. Much of the time issues come down to money, but we will always rely on the home offices and what they do. Our intention has never been to replace anyone or any office. If students want to drop by with questions, Tara and Lori are always happy to help.

- ◆ Jane Kill then asked if appointments are necessary or if drop ins are welcome or how is the workflow handled?

Jill Beauregard stated appointments can be made, but many students just drop by. This reiterates the office hours being conducive for student's schedules. There are busy times, beginning of semesters, summer etc. when no appointments are made. At that time, it is a first come first serve basis. We are excited now to be able to track some data, which previously has not been possible. Having this data available, we can try and improve retention etc. and be accountable to some of those goals we have made.

- ◆ Margaret Kuchenreuther read a portion of last paragraph *"By strategically using HEAPR funds on other projects, we have managed to reassign existing funds to support this renovation..."* Margaret asked what projects are not being done.

Lowell Rasmussen responded the simple answer is the Twin Cities has changed how they interpret the use of HEAPR funds. They started crossing some of the projects off the list as it didn't meet their criteria any more. For instance, you can't do floor coverings any more as they don't have the 20 year life. HEAPR has a 20-year bond. The Twin Cities has gotten much stricter with what can be done with HEAPR funds. Because of this, several of our HEAPR projects were pulled when we were told they weren't eligible. We are trying to make sure we keep our same amount of HEAPR dollars so we don't have to return any dollars. We then sat down and re-examined projects and asked which could be funded with HEAPR dollars. We then pulled HEAPR dollars into those eligible projects.

- ◆ Jacque Johnson thanked the committee for allowing more conversation regarding the one stop office. She hoped that any questions have been answered. She is not sure of what the committee's response is but hopes possibly the action is to move forward and leave it at that?

Margaret Kuchenreuther felt most of the questions from last spring have been answered. The budget neutrality etc. and that everyone in the building is happy, then ok. Margaret then asked the members present their opinion.

- ◆ Julie Eckerle is not entirely sure if she agrees with moving forward. She is not sure of what power or role this committee plays. In her opinion when leaving this conversation, last spring there was a pretty strong question about the necessity of the office? I haven't heard anything since then until today. Maybe it is a communication breakdown. I am not sure what we are talking about today, or for that matter I am not sure what we were talking about last spring. I do think in a perfect world this is a good thing and all sounds wonderful. But for all the things we need to do on campus what makes this a priority?

Jill Beauregard said last spring after meeting for the second time and meeting with the other committees, everyone agreed it is a great idea and would be good for UMM students, BUT where would the money come from to run the office. So we came back with more revised job duties and as much as possible a budget neutral area. For today's meeting, Jill felt it was more with the money piece of it.

Jacquie Johnson stated since last spring there has been a lot of work and planning put into the process, including a preliminary drawings from architects. She appreciated Julie's question. But what has gone on is a shifting of resources, hiring of people, planning of space, exploration with offices that may be impacted. And then there is the issue of committees not working because of summer. The other question you raise is the role of the committee. The role of the committee is advisory and it really matters. Jill has taken very seriously the questions asked and done some serious exploration.

Jane Kill stated for her the money issue was a big deal and she felt the entire committee agreed on that front. Jill has done a good job exploring the change of things but also the resources. Jane feels if this works, it will be great.

Next week (Wednesday, Dec 5) the committee will meet again in the Prairie Lounge at 8:00 am. Peter Radcliffe will be present to discuss our progress on the comparison list. Margaret hopes to get more information out to the committee this weekend and perhaps it will aid in questions for Peter. We will see what he has to tell us.

## University of Minnesota, Morris One-Stop Office Proposal

November 28, 2012

**Background:** Last spring, both the finance and the planning committees heard presentations about a proposed “one-stop” office to provide support for students’ selected financial aid, business, and registrar transactions; Jill Beauregard, financial aid director, has been working since then with Clare Dingley, registrar, and with Colleen Miller, finance director, to further explore this possibility. Last spring, members of these two committees—finance and planning—raised a number of questions: what’s the problem we’re trying to fix? what number of staff would be required for such an office? would new resources be required? where would the office be located? These questions are addressed below.

**What is a one-stop office?** It is an office that provides an integrated, seamless, holistic approach to student service (customer service related functions) in the areas of Financial Aid, the Business Office (Student Accounts Receivable) and the Office of the Registrar.

**What’s the problem we’re trying to fix:** We believe that integrated student services and streamlined approaches to answering student questions (as well as faculty questions when they are trying to advise students) could be strengthened with a one-stop approach. Evidence from other institutions suggests that this approach can contribute to greater student satisfaction and better retention. For better or worse, the 21<sup>st</sup> century expectation of immediate response and quick and accurate answers to questions shapes the perspective of all consumers, including students and their families.

Many campuses—including U of M’s Twin Cities, Duluth and Rochester, and also campuses more like UMM (St. Scholastica, Gustavus, Hamline, Keene State College, Southern Oregon University, University of WI, Superior)—have moved to a one-stop approach. Examples include understanding the student account, methods of bill payment, billing due dates, direct deposit, credit balance refunds, parent/guest access, financial aid questions and express center needs, student employment, registration and changes, transcript requests, degree audits, withdrawals, veterans services, etc.

Creating a one-stop office isn’t a matter of co-location of offices. Instead, it involves the consolidation of similar functions from several offices under one umbrella, with service provided by staff members who have been specially trained and prepared for this purpose. The work of discrete offices (business; registrar; and financial aid) continues to be done behind the scenes and in current locations. One-stop counselors facilitate the retrieval of information and answers from these offices. We expect that this holistic approach to student services will create efficiencies for the other offices and that it will reduce instances of poor student service—incorrect advice given; the need for a student to return because answers are person-specific; the need for a student to make multiple trips back and forth between offices to resolve issues and answer questions.

With a one-stop approach, counselors are trained in procedures across offices and are knowledgeable about matters beyond the scope of a single office. They are able to respond quickly and authoritatively to a prescribed set of issues and questions.

The three offices that would be impacted by the one stop—financial aid, business office (Student Accounts Receivable) and office of the registrar, have been working since spring 2012 to continue to “map” the functions that would move from the respective offices to the one stop. The product of their work is available for further review for interested committee members in a large notebook in Jill Beauregard’s office or via a google.docs site.

**Staffing for the one stop:** The mapping exercise demonstrates that the majority of the work of the one-stop office resides in financial aid. Two open positions in the financial aid office—that which Any Sharpe had occupied and that which Lou Logan had occupied—have been filled with the intention of these positions becoming one-stop office counselors. We estimate that one additional position is ideally required for this office. This third position would be filled using dollars allocated annually to UMM by the federal government to offset the costs of administering federal programs. There are sufficient recurring funds existing to support a third position in a one-stop office. No new dollars for staff are required for this proposal.

**SE&E support for the one stop:** The increase to the campus fee, approved last spring, can be used to help support the supply and expense (S&E) needs for the One-Stop. These fees have to go to activities that are directly related to student support but that are not classroom specific (so cannot be used to support direct instructional costs like faculty positions, for example.) These funds will be used to support travel; training; computer acquisition; supplies. The estimated amount is between \$10,000-13,000 annually.

**Reporting for one stop:** The one-stop office will be managed directly by an assistant director of the student one-stop, and will report to the financial aid director.

**Location of the one stop office:** When we presented the concept to the finance and the planning committees last spring, we had not identified a location for this office. As everyone knows, space is tight on the campus and it isn’t always configured in a way that makes it usable for a 21<sup>st</sup> century learning purposes. After reviewing several possibilities, we have determined that the existing financial aid office can be reconfigured to support the one-stop. The architect’s preliminary drawings would entail taking the Behmler conference room off line as a conference room and incorporating that in a shared financial aid/one stop space. By strategically using HEAPR funds on other projects, we have managed to reassign existing funds to support this renovation, which would begin during the summer of 2013, with an anticipated one-stop opening in Fall, 2013. The renovation would encompass the whole first floor of Behmler, and so also has implications for the current Grants Office. Grants would not lose space, though some of their space (the current small conference room) would be relocated and they would benefit from the updating and refurbishing that would occur.