INVEST-TO-SAVE FUND

POST IMPLEMENTATION EVALUATION & REVIEW PROFORMA

Llywodraeth Cynulliad Cymru
Welsh Assembly Government

Project Title & I2S Reference

I2S-09-013-Creating a student one stop shop

Lead Organisation

Cardiff Metropolitan University (formerly UWIC)

Project Senior Responsible Officer (SRO)

Pam Ackroyd, Pro Vice Chancellor (Operations)

Project Aim & Objectives

Cardiff Metropolitan University wished to develop a one-stop-shop at its main academic campus, to significantly improve services and accessibility to its students (and potential students). This aim was in keeping with the Welsh Assembly Government's agenda for citizen-focussed services and achieving efficiency gains.

Projected Benefits: UPDATE REPORT NOVEMBER 2012

What have been the key achievements, focussing on key outputs and outcomes for citizens? How are these outcomes measured?
Evidence, both qualitative and quantitative, should be provided to show the difference made and link to the agreed outcome measures.

This Project Evaluation Report provides an update on the i-zone project, for the period September 2010 to date

The i-zone has been fully operational for two full academic years, 2010/11 and 2011/12 and is now entering its third year of operation.

The report provides an update against each of the original aims and objectives and includes quantitative data.

Service Principles:
The One-Stop-Shop should provide students with:

- *Contact that is easy and convenient,*
- *Polite, friendly, knowledgeable staff,*
- *A feedback mechanism to bring about service improvements*
- *A quick and correct response – first time every time.*

Students should:

- *not be passed from "pillar to post",*
- *not be burdened with unnecessary bureaucracy,*
- *not have to repeat what they have already said,*
- *not have to understand our team/UWIC structures,*

Aims and objectives:

- ***An aesthetic highly functional environment that effectively serves a variety of transactions and engagements with students; provides an excellent working environment for the Hub team***

- The i-zone is delivering the range of functions as originally set out, such as the verification of qualifications, CRB checks, fee and studio payments, International letter requests, Council tax enquiries, International social trip bookings and payments, ID card support, met Rider bus passes, assignments hand-ins, accommodation enquiries and payments, careers drop-ins etc.

  The environment has received considerable positive comment from both internal students and staff and external visitors. It features in two Videos online.


- ***Our students can access i-zone services through physical and e-portal resources***

- Students are now able to access the i-zone through 'multiple-channels' – *campus based*, face to face, or *virtually* through Facebook, Twitter, email, text, website, and of course (mobile) phone. Current developmental objectives include driving the development of mobile accessible e-portal and self services, linked to wider university initiatives such as 'Webpayments' allowing students to pay online and the 'Self-enrolment web portal (see below).

- ***Convenient operating hours eg 8.30 – 16.00 Monday – Friday***

- The i-zone has been open for 7 hours daily from 9.00am – 4.00pm,
  4 days a week (Wednesdays for 6 hours (10.0am – 4.0 pm), the 9.0-10.0 allowing for staff Team meetings). As previously noted, the original project identified that there was no demand for an evening or weekend service. The

service has however responded to demand, opening until 6 pm on occasions. The extended (flexible) opening hours compared to the previous service hours are greatly appreciated by the students; in the first year of opening the i-zone received numerous positive comments to illustrate this point.

- ***Access by telephone, email, face-to-face, post, fax, web chat, and through a self-service portal 24 hours a day, 7 days a week***

As noted above, the i-zone is developing its 'multi-channel' strategy to ensure the service is demand-driven and technology/new media-enabled with self service taking account of wider University 'self-service' initiatives. It is being developed within an enterprise wide framework that is taking account of mobile technologies and infrastructure. Fax is no longer used. Students are able to call 24/7 and if outside the opening hours messages are recorded and responded to within 24hours. Students wishing to drop off assignments outside the opening hours have a 'Drop-box' facility to ensure they can between 16.00 – 09.00 hours.

The most recent statistics of access by telephone show levels of demand: 6 months May-October 2012
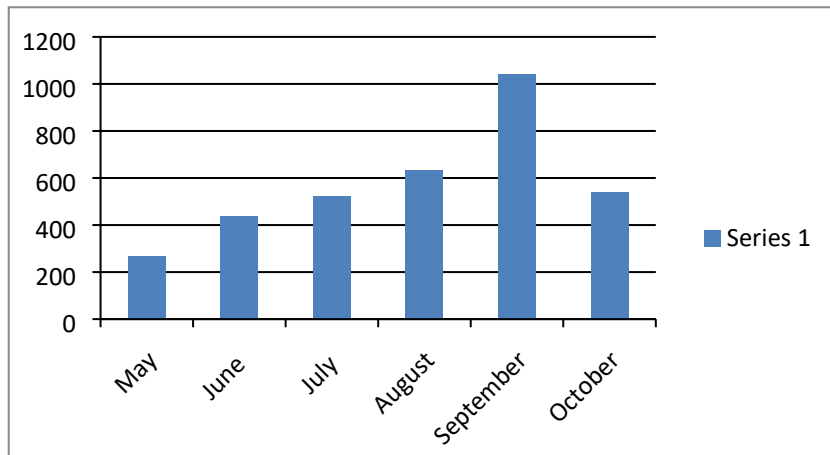
Face to face data for 2011 and 2012 is below.
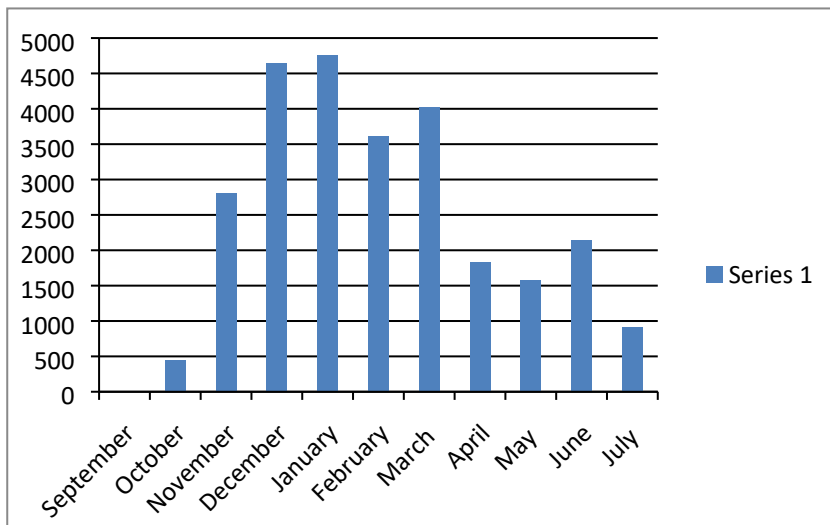
- *Development of a student request management system which allows Cardiff Metropolitan to identify any weaknesses in the service provided to support the redesign of processes or reallocation of resources*

   This is as described above but will also be incorporated into the University's wider mobile strategy as it develops.

- *Excellent customer service is provided by highly motivated staff – the service provided is professional, consistent, co-ordinated and proactive*

   - An intensive 8 week training programme was undertaken by staff with input by all the other central support units that work in partnership with the i-zone. The training included Customer Service training and Team building. On-going, service-demand-driven process training has taken place on over twenty topics such as the Data Protection Act, Awareness of and dealing with student problems, Counselling etc. The service is now making use of key corporate enterprise IT systems such as the new Student Record system to quickly access student data. Whereas students might have waited days previously for answers to their questions now the majority are answered and resolved on the spot.
   - A core team has been established and is delivering a high standard and consistent level of service. Feedback from staff and students (via feedback postcards) has been very positive and where students are not happy with particular aspects of services such as the Cardiff Bus metrider, it provides a mechanism to quickly feed back student concerns. Consistency is provided through it being procedure-driven.

- *The Hub team take ownership for all transactions – Aim for all multiple (cross disciplinary) transactions being managed through one interaction*

   The I-Zone Hub is taking ownership of transactional histories but as reported above this will become more efficient as a new STUDENT SELF SERVICE AND I-ZONE ENQUIRIES SYSTEM is brought into operation.

- *75% of queries are resolved without referral to the back office*

   - There is consensus that the i-zone exceeds the 75% target and that 'unresolved' issues account for less than 5% of enquiries. The highest 'referral rate' is for international students to the International Office, due largely to the specialist knowledge required in dealing with UK Border Agency compliance issues. Referrals are also made to specialist services within the Student Services unit such as Disability and Counselling and also to the Academic Registry in regard to enrolment issues or student loan /enrolment status issues.
   - Having the i-zone as the central collection point for student certificates and other documents (e.g. Council Tax exemption letters and 'metRider' bus passes) has been a major success with the extended opening hours over previous levels available to students.

- *A quarter of all contact is outbound, e.g. to update customers with progress, and chase and escalate non compliance*

   - Outgoing communication includes receipts for assignments, daily responses to emails on a wide range of topics and where necessary 'mass' emails to all Llandaff based students via SMS using the University's Communications Manager. Inbound and outbound data monitoring is increasing.

Graph illustrating typical weekly outbound emails by four i-zone staff.
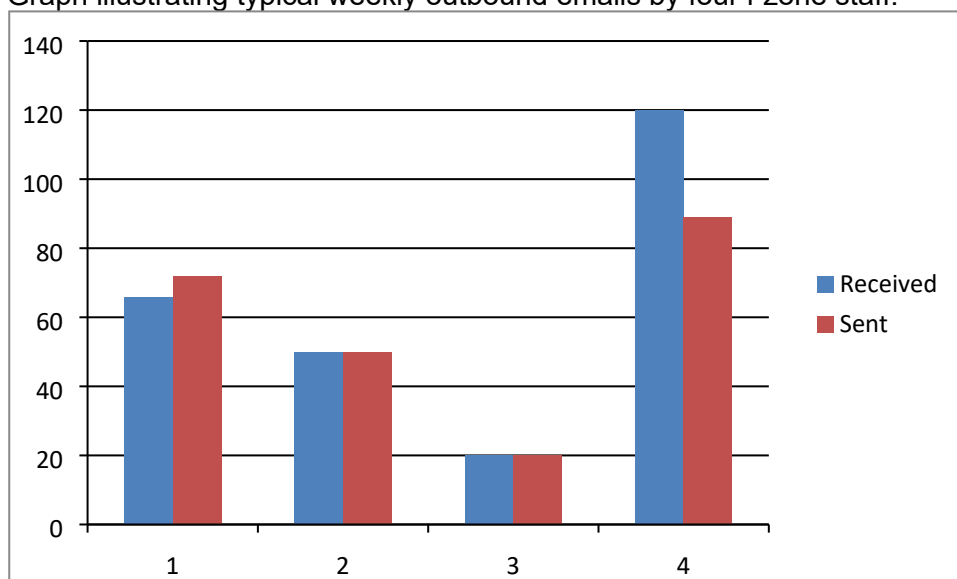
- ***50% of requests are resolved using self-service***

- 'Self service' is part of the University's wider move to empower students and provide them with convenient channels to access and undertake transactions themselves. The introduction of 'Webpayments', an online payment system enables students (or parents or sponsors of students) to make payments online from anywhere in the world. The new Student Records system has facilitated students being able to enrol themselves ('self-enrolment'). The University has recently introduced its first mobile 'app'. The new STUDENT SELF SERVICE AND I-ZONE ENQUIRIES SYSTEM will move toward the 50% target once implemented.

- ***Back office teams are able to focus on enquiries that require specialist knowledge and are able to go the extra mile***

  As projected, there has been a significant transfer and simplifying of 'front facing' duties that have in turn released staff (such as Academic Registry) to concentrate on specialist duties. This has also coincided with central service mergers and efficiency gains such as the Student Services, Academic Registry and I-Zone merger.

- ***i-zone ensures that services are responsive and accountable to all students by regular reporting and consultation***

  Formal reporting on the i-zone is via line management. The use of the ongoing feedback system (postcards) is at present being supplemented via engagement with the Cardiff School of Management students from Marketing who have already used the i-zone as a live project. Evaluating awareness and perceptions of the i-zone was part of the study that was commissioned to ensure the i-zone services are responsive. Students participated in a survey.

- ***90 % of customers are satisfied with the service and 75% report that we have exceeded their expectations***

- Captured feedback from staff and students remains very positive and sampling satisfaction levels suggests the 90% target is exceeded. Feedback is also obtained through on-going meetings with the Heads of other key

stakeholders such as the Communication, Marketing and Student Recruitment department, Academic Registry, Student Services and Accommodation. Bi-annual meeting are scheduled and include the Student Union.

- ***The i-zone can demonstrate to Cardiff Metropolitan University the value it is adding***

  The former Head of the Cardiff School of Management reported that with the relocation of the school from Colchester Avenue to Llandaff there had been a noticeable fall in enquiries to his academic and support staff as students were able to go to the i-zone. The Director of Learning and Teaching in the Cardiff School of Art and Design has also acknowledged that the i-zone is providing a high value service to art and design students not only through its existing services but in taking on new ones such as Art and Design students being able to pay for artist's materials at the i-zone, a function previously undertaken within the school.

- ***The i-zone is shortlisted for an external customer service award and is a bench mark for other HE's/public bodies.***

  - Cardiff Metropolitan University's i-zone was recognized for the prestigious Times Higher Education Leadership and Management Awards 2011 for their Outstanding Students Services Team, the only one in Wales and one of only six in the UK.

  - The i-zone plays an important contributory role with its engagement and service to our international students, working in close partnership with the International Office. Nominated for the third year running, Cardiff Metropolitan University has been ranked overall top in the UK for international student satisfaction. The University has also topped the world rankings for the quality of the student support. Conducted by i-graduate, the latest International Student Barometer (ISB), an independent research service specialising in the international education market. The survey is now the largest study of international students in the world and attracts feedback from over 400,000 students annually.

  - In addition to the University holding the Investors in People Award, the University previously held for 12 consecutive years the Government's CharterMark award, now rebranded the Customer Service Excellence award reflecting the embedded nature of our customer service ethos and culture. The service has been visited by the University of Glamorgan and recently Aberdeen University indicating its benchmark status.

What was the value of financial savings achieved? Please specify whether: cash savings, net of investment, recurrent in nature.

The following tables (1.1 & 1.2) were used originally to provide a summary of costs and forecasted savings. These have been updated to reflect actuals for the period to date (shown in red):

Table 1.1 Cost profile

Note ref	Cost description	09/10 (ac yr) (development phase)	10/11	11/12	12/13 forecasted	13/14 forecasted

1	Capital build	£860k*	-	-	-	-
2	Build design / Project management 15%	£120k	-	-	-	-
3	Equipment / furnishing	£23k	-	-	-	-
4	Staffing	£2k	£12.5k	£23k	£23k	£23k
5	Staff development	£2k	£0k	£5k	£5k	£5k
6	Operational	£0k	£10k	£10k	£10k	£10k
	Sub total	**£1007k (+vat)**	**£22.5k**	**£38k**	**£38k**	**£38k**
7	**Total grant investment (revised based on actual)**	**£718.5k**				

1) Capital build cost increased as the original scheme changed to allow for re-provision of corporate reception within the design. The cost difference was funded by UWIC.

4) 09/10 staffing costs related to the project manager. Appointment to the post was through redeployment in UWIC, with no backfill. Therefore only the additional salary cost is attributed to the project.

4) 10/11+ salary costs were lower than forecasted as all (except one Part time i-zone Advisor) of the posts were appointed through redeployment (with no backfill).
During 11/12, there was a requirement to increase the hours of the part time Advsior to full time.

5) Staff development costs lower than forecast. Initial training was primarily delivered in house through specialists in each service area. Customer service training was the only cost element at circa £1.5k, along with some travel costs to visit other university services. The training and costs straddled the two financial years 09/10 and 10/11 hence no costs showing in 10/11.
Budget allowance remains for subsequent years.

6) Minor expenditure included within 3) Expenditure / furnishing

7) The final investment loan was reduced to £718.5k

Table 1.2 Savings profile

Saving and repayment profile	10/11 Achieved	11/12 Planned / Recurrent	12/13 Planned / Recurrent	13/14 Planned / Recurrent
1) Phase 1 posts	£119k	£119k	£119k	£119k
1) Phase 2 posts		£87k	£87k	£87k
1) Post G	-	-	£29k	£29k
2) Process Efficiency	£9k	£9k	£15k	£15k
3) UWIC broader efficiency savings	-	-	-	£625k
Sub total	**£128k**	£208k	£208k	£833k

Labour savings achieved at start up were higher than forecasted; however subsequent to this, the University underwent a significant restructuring and voluntary severance round, ultimately reducing its labour costs by approxinmately £3m pa.
Part of this restructuring included the merger of the Izone service with two other service areas. As a result the University is unable to directly associate

labour savings with this service; although it is clear that the existence of the service supported the restructuring process

What customer feedback have you had and what stories can illustrate the success of the programme?

In addition to the above points, students from the Cardiff School of Management's Marketing programme are continuing to use the i-zone as a live project to research and gain student and staff feedback and inform development. This builds on the previous project and positive feedback from the students sampled.

Specific examples of the numerous feedback comments include: 'Always great' (service); 'Very happy, fast effective service'; 'Very cheerful and efficient staff working today'; 'Always nice service! Thank you'; 'Exceptional service'; 'Dealt efficiently and promptly with a difficult enquiry'; 'Fast, friendly and efficient'; 'I always find them helpful'; 'Very nice facilities. A lot nicer than the other university in Cardiff and staff much more pleasant'; 'Excellent services'; 'He has always helped me and even on my last day helped me with a smile'; 'Being open until 4.0 p.m may have just saved my degree. Thank you'; 'It's really posh here now'; 'The service was exemplary. Thank you'.

EVALUATION:
(reflecting on key processes and success factors such as: planning, commitment, communication, technical / operational, people, management, procurement, suppliers, resources).

What benefit has there been by this being identified as a priority Invest-to-Save project?

The Welsh Government's Invest to Save scheme was an important component of the i-zone's development. It is very unlikely that the project would have been implemented without the I2S investment

The investment has had numerous organizational benefits as recorded above.

To be Completed by SRO/Project Manager

Name: …………………………….…………….…

Contact telephone number: …………………………

Date:………………………………………………………

Please complete and return this form to Lee Thomas at lee.thomas2@wales.gsi.gov.uk by no later than 25th March 2011.