Customer Service Report

June 2018

Texas Higher Education Coordinating Board

60×30TX
Texas Higher Education
Coordinating Board

Agency Mission

The Texas Higher Education Coordinating Board (THECB) provides leadership and coordination for the Texas higher education system and promotes access, affordability, quality, success and cost efficiency through *60x30TX*, resulting in a globally competitive workforce that positions Texas as an international leader.

Agency Vision

The THECB will be recognized as an international leader in developing and implementing innovative higher education policy to accomplish our mission.

Agency Philosophy

The THECB will promote access to and success in quality higher education across the state with the conviction that access and success without quality is mediocrity and that quality without access and success is unacceptable.

The Coordinating Board's core values are:
Accountability: We hold ourselves responsible for our actions and welcome every opportunity to educate stakeholders about our policies, decisions, and aspirations.
Efficiency: We accomplish our work using resources in the most effective manner.
Collaboration: We develop partnerships that result in student success and a highly qualified, globally competent workforce.
Excellence: We strive for excellence in all our endeavors.

The Texas Higher Education Coordinating Board does not discriminate on the basis of race, color, national origin, gender, religion, age or disability in employment or the provision of services.

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Executive Summary

The Texas Higher Education Coordinating Board (THECB) is committed to meeting the highest customer service standards. Under its *Compact with Texans*, the THECB reaffirms its commitment to professional service, responsiveness, effective communication, and follow-through with each of our customers. THECB customers can expect employees to be courteous, knowledgeable, and efficient when providing services. The agency is also dedicated to continuous improvement, using customer survey comments to help improve the quality and delivery of services.

Texas Government Code, Section 2114, requires state agencies and institutions of higher education to develop customer service standards and implement customer satisfaction assessment plans. By June 1 of every even-numbered year, a report on customer service is submitted to the Governor's Office Budget Division and the Legislative Budget Board. This report provides a general description of the THECB, its *Compact with Texans*, and a list of external customers. It also provides the information-gathering methods used to assess the agency's performance on customer service standards, an analysis of survey findings, customer suggestions for improvements, improvements implemented, Fiscal Year (FY) 2017 and Estimated FY 2018 performance measures, and next steps.

Overall, 64 percent of the survey respondents were satisfied with the services they received from the agency. The three service quality elements that scored the lowest on the survey relate to the agency's website (primarily the loan program management website) and the timeliness and reasonableness of how complaints and requests for services are handled. Specifically, respondents expressed the need for the agency to update its student loan website, fix broken links, and improve its functionality to reduce the borrower's need to contact customer service representatives for assistance via telephone, which presented its own challenges.

In response to survey comments received in FY16 through March 2018, the agency has implemented several significant improvements outlined in this report and anticipates improving customer satisfaction in future years as a result.

Customer Service Report

THECB Compact with Texans – Statement of Customer Service Principles

The Texas Higher Education Coordinating Board (THECB) is committed to meeting the highest customer service standards. One of the key operational goals of the agency's strategic plan is to maintain a skilled and knowledgeable staff to provide excellent customer service. This goal directly supports the statewide vision of ensuring each state agency is highly efficient, effective, transparent, and accountable. It also supports the statewide objective that state agencies be attentive to providing excellent customer service. Under its *Compact with Texans* (see Appendix A), the THECB reaffirms its commitment to professional service, responsiveness, effective communication, and follow-through with each of our customers. Our customers can expect agency employees to be courteous, knowledgeable, and efficient when providing services.

Agency Description

The THECB was created by the Texas Legislature in 1965 to "represent the highest authority in the state in matters of public higher education and is charged with the duties to take an active part in promoting quality education throughout the state by:

- providing a statewide perspective to ensure the efficient and effective use of higher education resources and to eliminate unnecessary duplication;

- developing and evaluating progress toward a long-range master plan for higher education and providing analysis and recommendations to link state spending for higher education with the goals of the long-range master plan;

- collecting and making accessible data on higher education in the state and aggregating and analyzing that data to support policy recommendations;

- making recommendations to improve the efficiency and effectiveness of transitions, including between high school and postsecondary education, between institutions of higher education for transfer purposes, and between postsecondary education and the workforce; and

- administering programs and trusteed funds for financial aid and other grants as necessary to achieve the state's long-range goals and as directed by the legislature." (Texas Education Code, Section 61.051)

The THECB is governed by nine members appointed to six-year staggered terms by the governor, with consent of the senate, and one non-voting student representative appointed by the governor to a one-year term. The board appoints the Commissioner of Higher Education, who serves as the chief executive officer for the agency, which has 265.4 authorized (235 actual) full-time equivalent (FTE) positions. The Commissioner serves as the CEO for the agency and the state's chief expert on higher education, making policy recommendations and carrying out higher education initiatives on behalf of the board.

Inventory of External Customers

The THECB administers several state and federal programs; administers a $1.5 billion student loan portfolio servicing nearly 232,000 loans annually; provides loan repayment assistance to thousands of eligible constituencies, such as faculty, teachers, dentists, physicians, and mental health providers; and distributes $1.6 billion annually in grants and pass-through allocations, serving a broad range of eligible recipients. There are currently 1.5 million students enrolled at Texas public and independent institutions of higher education, which include 37 public and 38 independent universities, 50 public community college districts with multiple campuses, 10 health-related institutions, 6 technical colleges, and 3 state colleges. The agency also has several other customers and stakeholders, including policymakers; researchers; the media; and local, state and federal agencies. For a complete inventory of external customers served by the THECB's budget strategies as they appear in the General Appropriations Act for the 2018-19 Biennium and a brief description of the types of services provided to them, see Appendix B.

Information-Gathering Methods

To assess customer satisfaction, the agency uses a Likert-scale survey and makes it available on the main website. In previous years, the agency sent a blast email with the survey link to customers who were subscribers of the agency's GovDelivery system, which is a digital tool for providing information on various topics to interested stakeholders. In 2016, to improve the customer satisfaction assessment process, the agency began actively sending the survey directly to customers who receive an agency response to their online inquiry or complaint submitted via the "Contact Us" feature on the agency's website. Survey responses that were submitted to the agency between May 13, 2016 and March 15, 2018 were analyzed for this report.

In addition to the customer satisfaction survey, the agency uses the Customer Relationship and Feedback Tracking (CRAFT) System, an internal software application that allows agency staff to easily record and track inquiries, requests, and complaints received by phone, email, website, mail, and fax. The online form includes a wide range of reasons for contacting the agency, including complaints against the agency. This report includes CRAFT cases that were completed between March 14, 2016 and March 14, 2018.

Survey Results

There were 1,381 respondents to the customer satisfaction survey between March 13, 2016 and March 15, 2018. For purposes of this report, the response rate is not able to be determined since the survey is available to anyone who visits the agency's website. As mentioned above, the agency also sends the survey directly to customers who receive an agency response to inquiries, requests, and complaints submitted through the CRAFT system. The total number of CRAFT completed cases for this period was 32,334. Using this total, the survey response rate was 4.3 percent.

Respondents were self-categorized as a:

- Student: 34%
- Public Institution of Higher Education: 20%
- Parent: 11%
- Public Citizen: 10%
- Private Institution of Higher Education: 10%
- Career College or School: 5%
- Business Entity: 1%
- Community-based Organization: 1%
- Other Texas State Agency: 1%
- Public School District: 1%
- No Response: 6%

Results of Service Quality Elements

The following is a summary of the survey responses relating to the service quality elements that are statutorily required to be assessed. The three service quality elements that scored the lowest on the survey relate to the agency's website (primarily the student loan management website) and the timeliness and reasonableness of how complaints and requests for services are handled. For charts detailing these results, see Appendix C.

Overall satisfaction – most of the survey respondents (63%) indicated that they strongly agreed or agree with the statement "Overall, I am satisfied with my experience" with the agency, while 18 percent strongly disagreed and 9 percent disagreed; the remaining respondents were neutral on this question.

Facilities – most of the survey respondents (73%) indicated that they strongly agreed or agree with the statement "If I visited the facility, it was clean and orderly," while 6 percent strongly disagreed and 5 percent disagreed; the remaining respondents were neutral on this question.

Staff Knowledge – most of the survey respondents (73%) indicated that they strongly agreed or agree with the statement "If I interacted with staff, staff members were knowledgeable and helpful," while 8 percent strongly disagreed and 9 percent disagreed; the remaining respondents were neutral on this question.

Staff Courtesy – most of the survey respondents (81%) indicated that they strongly agreed or agree with the statement "If I interacted with staff, staff members were courteous and professional," while 5 percent strongly disagreed and 5 percent disagreed; the remaining respondents were neutral on this question.

Information Received – most of the survey respondents (68%) indicated that they strongly agreed or agree with the statement "If requested, I received the information I needed to obtain services," while 15 percent strongly disagreed and 8 percent disagreed; the remaining respondents were neutral on this question.

Website – most of the survey respondents (51%) indicated that they strongly agreed or agree with the statement "If I visited the website, it was easy to use, well organized, and contained accurate information," while 18 percent strongly disagreed and 13 percent disagreed; the remaining respondents were neutral on this question.

Complaints – less than half of the survey respondents (36%) indicated that they strongly agreed or agree with the statement "If I filed a complaint, it was handled in a reasonable and timely manner," while 30 percent strongly disagreed and 20 percent disagreed; the remaining respondents were neutral on this question.

Services Requested – most of the survey respondents (63%) indicated that they strongly agreed or agree with the statement "If I called, wrote, emailed, or made a request for services, it was handled in a reasonable and timely manner," while 19 percent strongly disagreed and 10 percent disagreed; the remaining respondents were neutral on this question.

Printed Material – most of the survey respondents (66%) indicated that they strongly agreed or agree with the statement "If I received printed materials, it provided thorough and accurate information," while 12 percent strongly disagreed and 9 percent disagreed; the remaining respondents were neutral on this question.

Analysis of Findings

Out of 1,381 survey respondents, 593 provided comments: 21 percent (or 127) of the respondents' comments were favorable toward the quality and efficiency of the agency's customer service; 60 percent (or 355) were negative; and 19 percent (or 111) provided suggestions for improvements. Most of the complaints centered on the agency's Borrower Services department. Specifically, respondents complained about the outdated student loan program management website, broken links, and the lack of functionality that, if improved, could reduce the customer's reliance on contacting customer service representatives via telephone, which presented its own challenges. They complained about excessive telephone wait times; lack of courtesy and professionalism by customer service representatives; the long turnaround time to process loan applications; and some indicated that their question was not fully addressed, they received a canned response, or received no response at all. Suggestions for improvements were primarily focused on making it easier for borrowers to update their personal/billing information online, improving online payment options so that borrowers may apply payments to loans with the highest interest rates, and accepting Visa for payment.

Out of 32,334 inquiries received via the CRAFT System, 670 were categorized as complaints of which 578 were complaints against a Texas institution of higher education; 92 were complaints against the agency and were related to student financial aid.

Improvements Implemented in 2017-18

The agency has recently implemented several improvements aimed to increase customer service and satisfaction. Below is a list of some of these improvements followed by a more detailed description of the three major projects that have been implemented to improve customer service:

- Added the option on the customer satisfaction survey for respondents to provide contact information so that staff may immediately follow up with a dissatisfied customer and properly address their inquiry or complaint.

- Improved the robustness of the agency's customer satisfaction assessment process by sending the survey to all completed inquiries and complaints submitted via the online "Contact Us" feature.

- Implemented daily monitoring of survey comments by the Deputy Commissioner for Agency Operations and Communications/Chief Operating Officer to provide real-time follow-up of complaints and concerns expressed by customers.

- Implemented monthly monitoring of CRAFT responses to ensure timeliness of responses and compliance with the agency's *Compact with Texans*.

- Installed Siteimprove software for the agency's websites to fix broken links, ensure accessibility compliance, and improve quality assurance.

- Worked with Texas NICUSA, the vendor under the Texas Department of Information Resources that provides student loan credit card payment services to borrowers, to accept Visa payments toward student loans.

- To ensure agency emails do not get redirected as SPAM or junk email by customers who contact the agency via the "Contact Us" webpage, the following message was added prior to customers submitting their inquiry:

  - To ensure our response to your inquiry is not regarded as junk email, please add the domain "@thecb.state.tx.us" to your email system's safe senders list. Please click OK to submit your inquiry.

- Implemented a separate toll-free number from Borrower Services for Financial Aid Services to provide more targeted, quality customer assistance to borrowers and institutions of higher education.

Upgrade of the Loan Program Management System (HELMS)

In April 2017, the THECB upgraded its loan program management system known as HELMS. The HELMS system is used by the agency to manage loan origination and servicing of its $1.5 billion student loan portfolio. Under the upgraded system, visitors interface with a more modern, easy-to-navigate site that provides increased functionality and more complete loan information for both borrowers and co-signers. It allows for e-signing of borrower and co-signer online applications (including the promissory note), and provides a mechanism for real-time demographic changes to accounts. In addition, borrowers can now access the site from any desktop or mobile device using major web browsers (e.g., Chrome, Internet Explorer, Safari, and Firefox), which delivers a substantially better user experience and increased access to more account holders. The upgraded system also meets all state and federal web accessibility requirements providing all users full access to their loan information. However, there are still many improvements to be made, which the agency is in the process of prioritizing among many other significant technology needs.

In 2016, the agency also engaged Weaver, L.L.P., through a competitive bid process to perform a consultative review of the student loan program operations. A total of 66 recommendations for improving the loan program operations were identified across eight process areas (including customer service) and were risk-rated as high, moderate, and low to assist the agency in prioritizing implementation. Of the eight recommendations relating to customer service, three were rated as moderate-risk and five were rated as low-risk. Below are some of the findings relating to customer payment processing and loan origination processing, including Weaver's recommendations for improving efficiencies, which have mostly been implemented.

<u>Customer Payment Processing</u>
- THECB processes an estimated 35,600 payments per month
- Processing time ranges from one to 6.5 days
- An estimated 80 percent of payments are received at peak times (seven of 21 business days a month)
- Recommendation by Weaver, L.L.P.: THECB should encourage borrowers to utilize auto-draft payments or online payments to reduce the number of payment errors and to minimize the processing time required by THECB personnel.
- To be implemented in October, 2018.

<u>Loan Origination Processing</u>
- THECB processes an estimated 31,000 applications per year
- Processing time ranges from four to 28 days
- An estimated 70 percent of applications are received at peak times (five months of the calendar year)
- Recommendations by Weaver, L.L.P.:
    - THECB should encourage the use of electronic correspondence with applicants and co-signers.
    - THECB should continue to update the website to ensure that multiple web browsers are available for applicants to apply for loans.
    - THECB should consider modifying their application process to require Loan Representatives to scan and process application documentation, reducing the number of hand-offs and stop-start processing.
- All have been implemented.

ACD/IVR Phone System Upgrade

One of the most relevant customer service projects that has been completed in the past year is the implementation of the agency's new Automated Call Distribution (ACD) and Interactive Voice Response (IVR) system. A few of the customer service highlights include:

- Automated verification of borrower identity, which allows the Customer Service Representative to immediately start helping the caller when the call is connected, rather than requiring the customer to repeat the borrower identity information that had already been entered into the system.

- Automated call triage, which pulls additional staff into the queue as wait times increase (e.g., if wait times exceed four minutes, more staff are pulled into the queue; with additional staff added at eight, 12, and 16 minute increments).

- Automatic callback, which allows the caller to hang-up while maintaining their place in the queue. The system automatically calls back the borrower when it is his/her turn to speak to a representative.

Since the implementation of the ACD/IVR system, the agency's Student Financial Aid Programs department has consistently had average wait times of less than 10 seconds on both the Texas Financial Aid and Information Center hotline and the toll-free line for institutions.

Agency Website Redesign

The agency collects, analyzes, reports, and publishes a vast amount of data and information that is made available to the public on its website. While the agency was fortunate to utilize a Bill and Melinda Gates Foundation grant in 2017 to support the creation of www.60x30TX.com to focus on data and information related to the state's higher education strategic plan, the agency's main website has not been updated for over 10 years due to lack of resources. Feedback from previous customer satisfaction surveys indicated that the agency's website is unwieldy, outdated, and difficult to navigate. In response, the agency established an internal website governance committee comprised of staff from each division/department to redesign the website using existing resources. The committee members have been working diligently and collaboratively over the last several months with IT staff, as well as other key staff across the agency, to modernize the agency's main website and improve its content, functionality and user-friendliness. An external launch is planned for May 2018.

Next Steps/Conclusion

Currently, the agency's Student Financial Aid Programs division, which includes Borrower Services and Financial Aid Services, is working toward improving customer self-sufficiency or self-service by increasing electronic support that allows customers to access information and perform routine tasks without requiring the assistance of a customer service representative. To that end, the agency is in the process of implementing three major projects:

- Improving the process for online Automated Clearing House (ACH) payments, which includes many additional features, such as helping borrower's direct their payments toward specific loans.

- Implementing Phase 2 of the ACD/IVR phone system upgrade, which includes auto-dialing, thus freeing up considerable staff time which can then be focused on customer interactions.

- Reducing errors and unapplied payments, which will allow payments to appear on borrower accounts more quickly and more accurately.

An additional customer service project currently being considered is an electronic correspondence system as part of the loan program management system. This would allow borrowers to elect online access to their billing statements, tax statements, and other notifications. It would also reduce costs (primarily postage) and reduce staff time currently spent on system documentation. These savings would then be focused on enhanced customer interactions.

The agency's Borrower Services is also providing additional training for customer service representatives and working to improve response times for borrowers contacting the department via CRAFT. Borrower Services has implemented a triage system, whereby all CRAFT cases are quickly reviewed and assigned a priority, so that the customer service representatives can easily identify which CRAFT cases are straight-forward (and thus need to be answered within a day) vs. which will require research (requiring additional days). While the agency's *Compact with Texans* stipulates up to 10 days to complete cases requiring research, the department is working to reduce this to a five-day maximum. Finally, the agency's Student

Financial Aid Programs division is in the process of implementing additional customer response metrics as available in Appendix E.

In conclusion, The THECB is dedicated to continuous improvement. The agency will continue to expand and strengthen its use of the CRAFT system to ensure timely responsiveness to inquiries and complaints, and to improve quality assurance. The agency will also continue to regularly review and follow-up on complaints and suggestions for customer service improvements submitted by survey respondents.

Appendix A

THECB Compact with Texans

Statement of Customer Service Principles:
The Texas Higher Education Coordinating Board (THECB) is committed to meeting the highest customer service standards. In this *Compact with Texans*, we reaffirm the THECB's commitment to professional service, responsiveness, effective communication, and follow-through with each of our customers. Our customers can expect THECB employees to be courteous, knowledgeable, and efficient when providing services. The THECB is dedicated to the continual improvement of service delivery, using customer comments to help improve services and minimize response times.

Standard response times for agency services are as follows:

- General information requests not requiring research and analysis are acknowledged and answered within one working day. Information requests that require either new data to be collected or existing data to be compiled in a new format may require additional days within which to respond.

- Information requests requiring research and analysis, as well as materials submitted for processing, are processed within 10 working days (or customers will receive notification of additional information needed to complete their request).

- On average, phone calls will be answered in less than two minutes, though peak periods may experience longer wait times.

- Academic and technical degree program proposals submitted by public institutions of higher education are deemed complete – unless otherwise indicated by staff - within five working days after receipt of the proposal.

- Doctoral program proposals are considered within one year following submission of a completed proposal.

Important items to note related to student loans:

- Payments are applied to loan accounts using an effective date of the day the funds are received. (Please note that it may take up to three days for this to be reflected on your account.)

- Loan applications require active processing by the borrower, the agency, and the institution where the student will be attending. Thus, borrowers should allow for at least 30 days between submitting a complete loan application and the delivery of the funds to the institution.

- Loan repayment program applications require active processing by the borrower, the agency, the borrower's employer, and the lender(s) holding the borrower's loan(s). Thus, loan repayment program applicants should allow for at least 30 days after the application deadline date for an eligibility determination to be made by the agency.

Procedure for Complaints Against the THECB:

To file a complaint related to THECB activities or to inquire about the agency's customer service policies, contact:

> Linda Battles, Deputy Commissioner for Agency Operations and Communications/COO
> Texas Higher Education Coordinating Board
> P.O. Box 12788
> Austin, Texas 78711
> Telephone: (512) 427-6205
> Fax: (512) 427-6127
> E-Mail: Linda.Battles@thecb.state.tx.us

Complaints and inquiries are entered into and maintained on an electronic tracking system and are assigned to the appropriate agency division personnel for resolution. When complaints are not resolved within 10 working days, the system notifies the customer service coordinator who intervenes to facilitate resolution, referring the matter to the appropriate assistant commissioner if necessary. Matters not able to be resolved by an assistant commissioner are forwarded to the Commissioner for resolution. For quality control, the customer service coordinator may follow up on complaints that have been resolved by a division.

Procedure for Student Complaints Against an Institution of Higher Education:

After exhausting the institution's grievance/complaint process, current, former and prospective students may initiate a complaint with the THECB by:

1. Completing the online student complaint form available through the Agency's "Contact Us" link at https://www1.thecb.state.tx.us/Apps/CRAFT/Home/Create; or by
2. Downloading and completing a .pdf version of the complaint form at THECB - Student Complaints and either:
   a. emailing it to StudentComplaints@thecb.state.tx.us; or
   b. mailing it to the Texas Higher Education Coordinating Board, P.O. Box 12788, Austin, Texas 78711-2788.

Facsimile (faxed) transmissions of the forms are not accepted.

Complaints submitted regarding students with disabilities must be accompanied by a signed Authorization to Disclose Medical Record Information Form, available at THECB - Student Complaints.

Information Requests:

For information regarding financial aid services, contact Student Financial Aid Programs at 1-800-242-3062 (or 512-427-6340 if inside the Austin area).

For general public information, contact the Office of External Relations:
> **John Wyatt, Director**
> Office of External Relations
> Texas Higher Education Coordinating Board

P.O. Box 12788
Austin, Texas 78711
Telephone: 512-427-6111
Fax: (512) 427-6127
E-Mail: John.Wyatt@thecb.state.tx.us

For media inquiries and interview requests, contact the Office of External Relations:
Kelly Carper Polden, Assistant Director of Communications
Office of External Relations
Texas Higher Education Coordinating Board
P.O. Box 12788
Austin, Texas 78711
Telephone: 512-427-6119 (after-hour calls will be transferred to a cell phone)
Fax: 512-427-6127
E-Mail: Kelly.polden@thecb.state.tx.us

Your feedback is important to us. Please take a moment to complete this Customer Service Survey and let us know how the Texas Higher Education Coordinating Board can better serve you. Thank you.

Appendix B

Inventory of External Customers

The following table is an inventory of the THECB's external customers organized by the agency's budget goals and strategies listed in the 2018-2019 General Appropriations Act. The table also briefly describes the types of services provided.

Budget Strategy	Customers Served	Types of Services Provided
A.1.1. College Readiness & Success	High School and College Students, Parents, Institutions of Higher Education, Public High Schools, Education Service Centers, Community-Based Organizations, State and Federal agencies, Business/Industry	Provide activities and initiatives that focus on the relationship between public and higher education, the success of students in higher education, and the promotion of a college-going, career-ready culture in Texas. Fosters college access, preparation, participation, and completion of a higher education credential of value for all people that reside in Texas.
A.1.2. Student Loan Programs	Borrowers, Co-Signers, Students, Parents, Institutions of Higher Education, Faculty, Teachers, Dentists, Physicians, and Mental Health Providers	Provide low-interest loans to students to help pay for college and loan repayment assistance for eligible recipients.
A.1.3. Financial Aid Services	Institutions of Higher Education, Students, Parents	Administer state and federal financial aid programs to help students pay for college.
A.1.4. Academic Quality & Workforce	Students, Parents, Institutions of Higher Education, State and Federal agencies, Business/Industry, Health Organizations, Physicians	Provide leadership, guidance, expertise, and resources to improve the efficiency and quality of higher education. Review and approve new academic and technical programs; administer grants; provide oversight of for-profit institutions for consumer protection; improve transfer for students; work with institutions to develop marketable skills for students.

Budget Strategy	Customers Served	Types of Services Provided
A.1.5. Strategic Planning & Funding	Institutions of Higher Education, Researchers, Business/Industry, State and Federal agencies, Public High Schools, Legislators, Governor's Office, Students and Parents, Community-Based Organizations	Provide comprehensive planning for higher education funding and success and the delivery of accessible, affordable and quality higher education; provide the public with accurate and meaningful information on these topics; support and encourage the use of data to inform policy and practice; and administer programs effectively and efficiently.
A.1.6. Innovation & Policy Development	Researchers, institutions of higher education, public schools, community and business partners	Examine existing research and data to explore and propose visionary policy and novel ways of addressing key, long-term higher education issues, including financial aid and student debt, online education, alternative pathways to credentials, college completion, marketable skills, and best practices for incorporating learning technologies into higher education.
A.1.7. Oversight of For-Profit Institutions	Students, Parents, For-Profit Institutions of Higher Education	Provide oversight of the state's private post-secondary educational institutions, including for-profit, and non-profit career colleges and schools and out-of-state institutions offering degrees in Texas, and works with regional and national accrediting agencies to ensure that standards are maintained. Maintain a database of student

Budget Strategy	Customers Served	Types of Services Provided
		transcripts for schools that close.
A.1.8. Fields of Study	Students, Institutions of Higher Education (Faculty)	Develop, in collaboration with faculty advisory committees, blocks of courses that may be transferred to a public university and must be substituted for that institution's lower-division requirements for the degree program into which a student transfers, and for which the student must receive full academic credit toward the degree program for which the block of courses transferred.
B.1.1. Central Administration	Agency Staff & Operations, Students, Parents, Institutions of Higher Education, Boards of Regents/Trustees, Business/Industry, Media, Legislators, Governor, Other Elected Officials, State (CPA, LBB, SAO) and Federal agencies, Researchers	Provide oversight and administration of all aspects of the agency; includes work performed by the Commissioner, Deputy Commissioners, External Relations, General Counsel, Internal Audit and Compliance Monitoring, Human Resources, and Financial Services.
B.1.2. Information Resources	Agency Staff & Operations	Partner with the agency's business and program areas in the delivery of business solutions, information services, cybersecurity, and continuous improvement to the agency and its stakeholders.
B.1.3. Facilities Support	Agency Staff & Operations	Support for overhead costs such as building lease, facilities services, mail services, and copy services.
C.1.1. TEXAS Grant Program	Students, Institutions of Higher Education	Provide grants to academically prepared, financially needy students enrolled at public universities.

Budget Strategy	Customers Served	Types of Services Provided
C.1.2. Texas BOT Program-Public	Students, Institutions of Higher Education	Provide zero-interest loans that can be forgiven if a recipient graduates with a 3.0 or higher grade point average within four or five years (depending on the curriculum) or within six hours of the maximum number of hours required by the recipient's major. Legislature phased out this program so this is for renewal students only enrolled at public universities.
C.1.3. Texas BOT Program-Private	Students, Institutions of Higher Education	Provide zero-interest loans that can be forgiven if a recipient graduates with a 3.0 or higher grade point average within four or five years (depending on the curriculum) or within six hours of the maximum number of hours required by the recipient's major. Legislature phased out this program so this is for renewal students only enrolled at private universities.
C.1.4. Tuition Equalization Prog	Students, Institutions of Higher Education	Provide grants to financially needy students enrolled at independent nonprofit institutions.
C.1.5. TEOG – Public Community Colleges	Students, Institutions of Higher Education	Provide grants to financially needy students enrolled at public community colleges.
C.1.6. TEOG – Public State/Technical Colleges	Students, Institutions of Higher Education	Provide grants to financially needy students enrolled at public state and technical colleges.
C.1.7. Texas Work Study	Students, Institutions of Higher Education	Provide work study grants to students enrolled at public and private institutions of higher education.

Budget Strategy	Customers Served	Types of Services Provided
C.1.8. License Plate Scholarships	Students, Institutions of Higher Education	Provide scholarships for financially needy students.
C.1.9. Educational Aide Program	Students, Institutions of Higher Education	Reimburse institutions for tuition and fee exemptions provided to eligible educational aides who have financial need.
C.1.10. Top 10% Scholarships	Students, Institutions of Higher Education	Provide scholarships to students who graduate in the top 10 percent of their high school class. Legislature has phased out this program and only renewal students are eligible.
C.1.11. Texas Armed Services Scholarships	Students, Elected Officials, Institutions of Higher Education	Provide conditional scholarships to encourage students to enter the military. Must be repaid if students don't fulfill their obligations.
D.1.1. Advise TX	Students, Parents, Institutions of Higher Education, Public High Schools (Students, Counselors, Administrators)	Provide near-peer advisors on high school campuses to encourage students to apply for college and financial aid.
D.1.2. Developmental Education	Students, Institutions of Higher Education	Support initiatives to improve the success of students in developmental education.
E.1.1. Career/Technical Education	Students, Institutions of Higher Education, Business/Industry	Federal program to support students entering technical education programs.
E.1.2. Teach for Texas Loan Repayment Program	Teachers	Provide student loan repayment support for up to 5 years on behalf of Texas public school teachers who provide full-time instruction in a subject having a critical shortage of teachers or at a campus having a critical shortage of teachers.
E.1.3. Teacher Quality Grants	Teachers, US Department of Education	Federal grants to institutions of higher education to provide courses and sessions designed to deepen the content knowledge of teachers and improve

Budget Strategy	Customers Served	Types of Services Provided
		instructional quality in core academic courses. Funding is no longer available.
E.1.4. Other Federal Grants	Institutions of Higher Education, US Department of Education	Other federal grant programs.
E.1.5. Math & Science Scholars Loan Repayment Program	Teachers	Provide student loan repayment support to teachers who demonstrated high academic achievement as math or science majors, to teach math or science in Texas Public Schools for eight years, the first four of which are at Texas public schools that receive federal funding under Title I.
E.1.6. Northeast Texas Initiative and TC3	UT Health Science Center Tyler and Texarkana College	Provide support to the Northeast Texas Initiative and Texas Community College Consortium (TC3) which is a higher education collaborative effort to bring a wide range of instruction and healthcare services to 50 rural Northeast Texas counties.
E.1.7. Bilingual Education Program	Students, Institutions of Higher Education	Provide tuition assistance to encourage students who enroll in an educator preparation program at 7 eligible universities in the Dallas area to become certified teachers in bilingual education, English as a Second Language, or Spanish in school districts with high critical needs.
F.1.1. Family Practice Residency	Physicians	Provide financial incentives to improve the distribution of family physicians throughout the state and provides increased medical care to patients in underserved areas.

Budget Strategy	Customers Served	Types of Services Provided
F.1.2. Preceptorship Program	Students, Physicians	Provide support to Texas medical students to encourage them to choose primary care careers by offering an on-site experience in one of three primary care specialties: family practice, general internal medicine, or general pediatrics.
F.1.3. Graduate Medication Education Expansion	Medical Students, Institutions of Higher Education	Expand the number of first-year residency positions in Texas to help retain medical school graduates in the state.
F.1.4. Trauma Care Program	Medical Students, Hospitals, Institutions of Higher Education	Provide support for partnerships between hospitals and graduate medical education programs to increase the number of emergency medicine and trauma care physician residents and fellows.
F.1.5. Joint Admission Medical Program	Students, Institutions of Higher Education, Medical Schools	Provide support for highly qualified, economically disadvantaged students interested in becoming physicians.
F.1.6. Professional Nursing Shortage Reduction Program	Students, Institutions of Higher Education	Provide support to increase the number of graduates from professional nursing programs and the number of nursing faculty.
F.1.7. Physician Education Loan Repayment Program	Physicians	Provide student loan repayment support to encourage qualified physicians to practice medicine for at least four years in designated health professional shortage areas (HPSAs) of Texas.
F.1.8. Mental Health Loan Repayment Program	Mental Health Providers	Provide student loan repayment support to encourage qualified mental health professionals to practice in a mental health professional shortage area.

Budget Strategy	Customers Served	Types of Services Provided
F.1.9. Other Loan Repayment Programs	St. David's Hospital Foundation	Provide privately funded student loan repayment support to recruit and retain qualified primary care, behavioral health, and dental providers at eligible safety net sites located in the five-county area (Bastrop, Caldwell, Hays, Travis, and Williamson) served by the Foundation. The THECB no longer administers this program.
F.1.10. Nursing Faculty Loan Repayment Program	Nurses, Faculty	Provide student loan repayment support to improve access to nursing education programs by encouraging qualified nurses to serve as faculty at eligible institutions of higher education.
G.1.1. BCOM – UGME	Students, BCOM	Provide support for the education of Texas resident undergraduate medical students.
G.1.2. BCOM – GME	Medical Students, BCOM	Provide support for the training of resident physicians.
G.1.3. Tobacco Settlement Funds - BCOM – Perm Endowment	BCOM	Provide support for programs that benefit medical research, health education or treatment programs.
G.1.4. Tobacco Settlement Funds - BCOM – Perm Health	BCOM	Provide support for programs that benefit medical research, health education or treatment programs.
H.1.1. Tobacco Earnings – Minority Health	Students, Institutions of Higher Education	Provide support for research or educational programs that address minority health issues or that form partnerships with minority organizations, colleges, or universities to conduct research and educational

Budget Strategy	Customers Served	Types of Services Provided
		programs to address minority health issues.
H.1.2. Tobacco Earnings – Nursing/Allied Health	Students, Institutions of Higher Education	Provide grants to public institutions that offer upper-level instruction and training in nursing, allied health, or other health-related education.
I.1.1. Texas Research Incentive Program	Emerging Research Universities	Provide funding and incentives to support emerging public research universities in developing and maintaining programs of the highest tier.
I.1.2. Autism	Institutions of Higher Education, Centers for the Treatment of Autism	Provide support to identify new and innovative ways to maximize the number of autistic children reached; support projects that use both established and innovative treatment models, expanding the reach from the classroom into children's homes.

Appendix C

Customer Satisfaction Survey

To better serve you, the Texas Higher Education Coordinating Board appreciates you taking the time to complete this survey.

Please note:

- For each of the following statements, select the one which most clearly reflects your answer. You may skip items that do not apply.
- This survey is anonymous and we do not collect information which allows for identification of individuals. *
- If you do not have any experience with an item, mark "N/A" or "Not Applicable".

How many times have you had contact with the THECB staff in the past 12 months?
⦿ Once   ○ 2-5   ○ 5 or more

Indicate how long you have interacted with this agency.
⦿ 1 year or less   ○ 2-5 years   ○ 5 or more years

Which customer type would you consider yourself (mark only one):

○	Business Entity	○	Public Citizen
○	Career College or School	○	Public Higher Education Institution
○	Community-Based Organization	○	Public School District
○	Educational Association	○	Other Texas State Agency
○	News Media	○	Researcher
○	Parent	○	State or Federal Legislative Office
○	Private Institution of Higher Education	○	Student

Indicate how strongly you agree or disagree with the following regarding the service you received and please skip those which do not apply:

Statement	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	N/A
If I visited the facility, it was clean and orderly.	○	○	○	○	○	⦿
If I interacted with staff, staff members were knowledgeable and helpful.	○	○	○	○	○	⦿
If I interacted with staff, staff members were courteous and professional.	○	○	○	○	○	⦿

If requested, I received the information I needed to obtain services.	○	○	○	○	○	⦿
If I visited the website, it was easy to use, well organized, and contained accurate information.	○	○	○	○	○	⦿
If I filed a complaint, it was handled in a reasonable and timely manner.	○	○	○	○	○	⦿
If I called, wrote, emailed, or made a request for services, it was handled in a reasonable and timely manner.	○	○	○	○	○	⦿
If I received printed material, it provided thorough and accurate information.	○	○	○	○	○	⦿
Overall, I am satisfied with my experience.	○	○	○	○	○	⦿

Provide any suggestions to improve the quality of our customer service:

Please do NOT include your full Social Security Number inside the issue description. If you have a question about the status of a new loan application, accounts in repayment, or deferments, please visit the Contact Us page.

***If you would like staff to contact you, provide your name and email address below:**
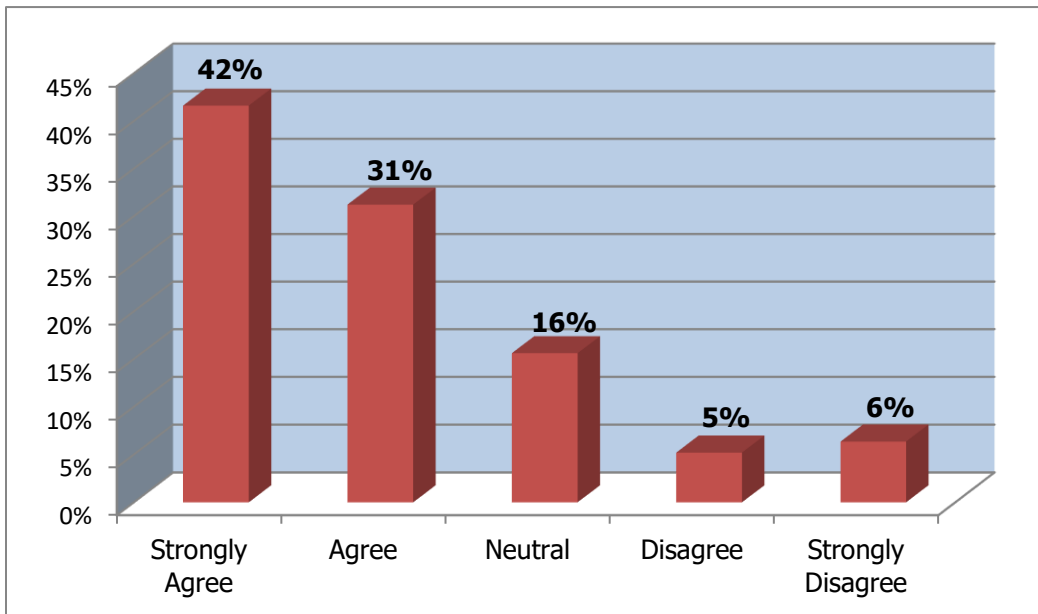
Name:

Email:

Appendix D

Charts of Customer-Determined Service Quality Elements

Below are charts detailing the levels of customer-determined service quality and other relevant information received, and each statutorily required customer service quality element (i.e., facilities, staff, communications, Internet sites, complaint-handling processes, service timeliness, and printed information).
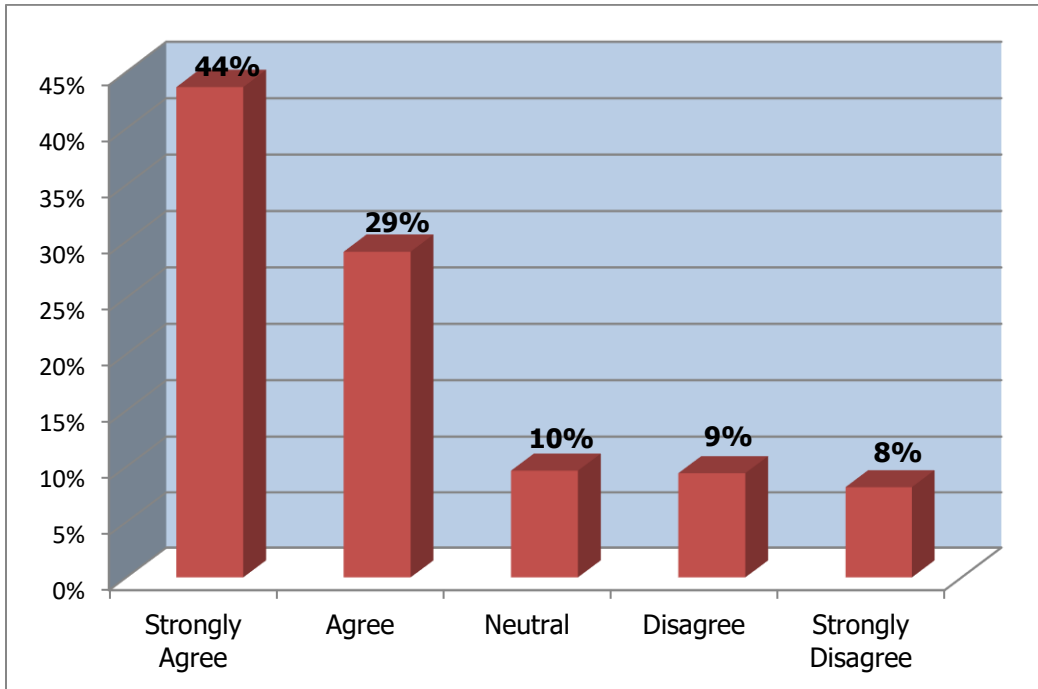
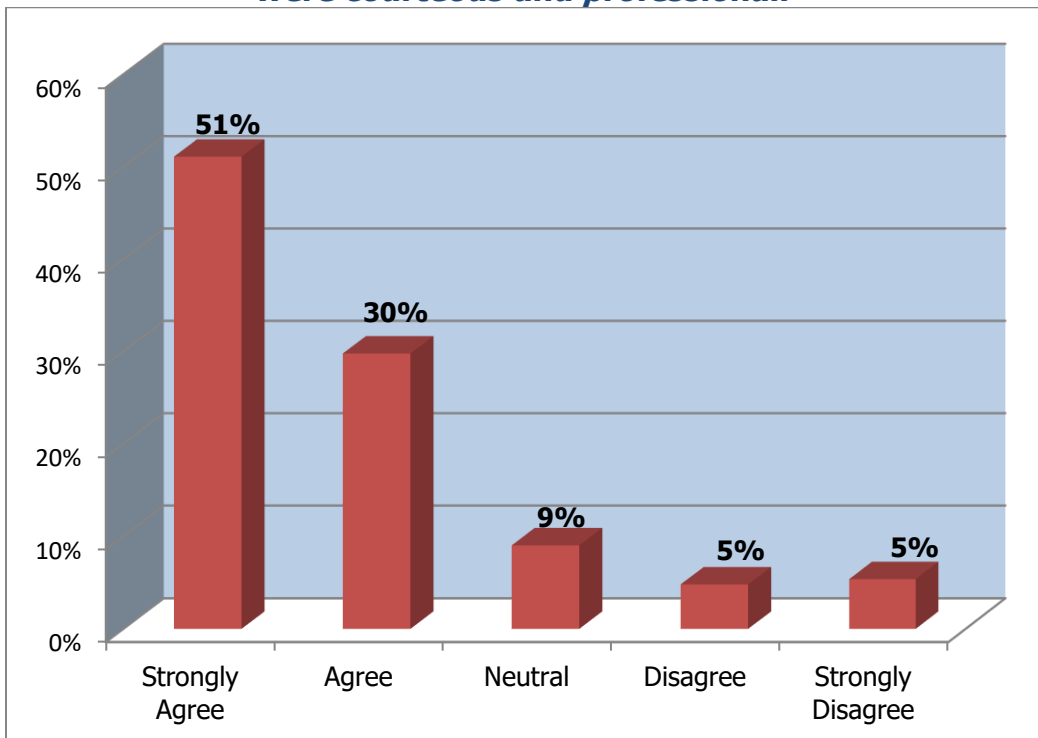### Overall Satisfaction – "Overall, I am satisfied with my experience."

Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
38%	25%	10%	9%	18%
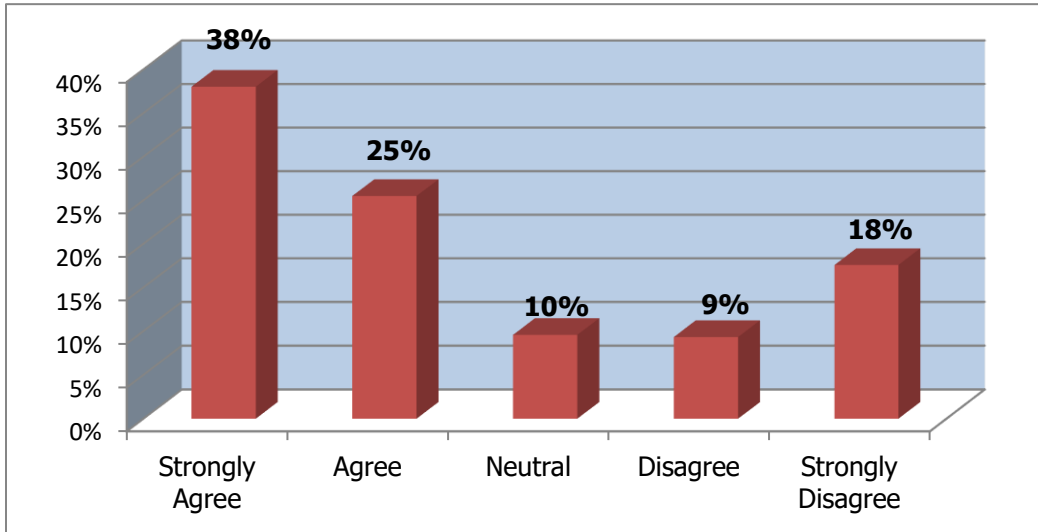
Facilities – "If I visited the facility, it was clean and orderly."

Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
42%	31%	16%	5%	6%

Staff Knowledge – "If I interacted with staff, staff members were knowledgeable and helpful."

Bar chart showing responses:
- Strongly Agree: 44%
- Agree: 29%
- Neutral: 10%
- Disagree: 9%
- Strongly Disagree: 8%

Staff Courtesy – "If I interacted with staff, staff members were courteous and professional."

Bar chart showing responses:
- Strongly Agree: 51%
- Agree: 30%
- Neutral: 9%
- Disagree: 5%
- Strongly Disagree: 5%

Received Information – "If requested, I received the information I needed to obtain services."

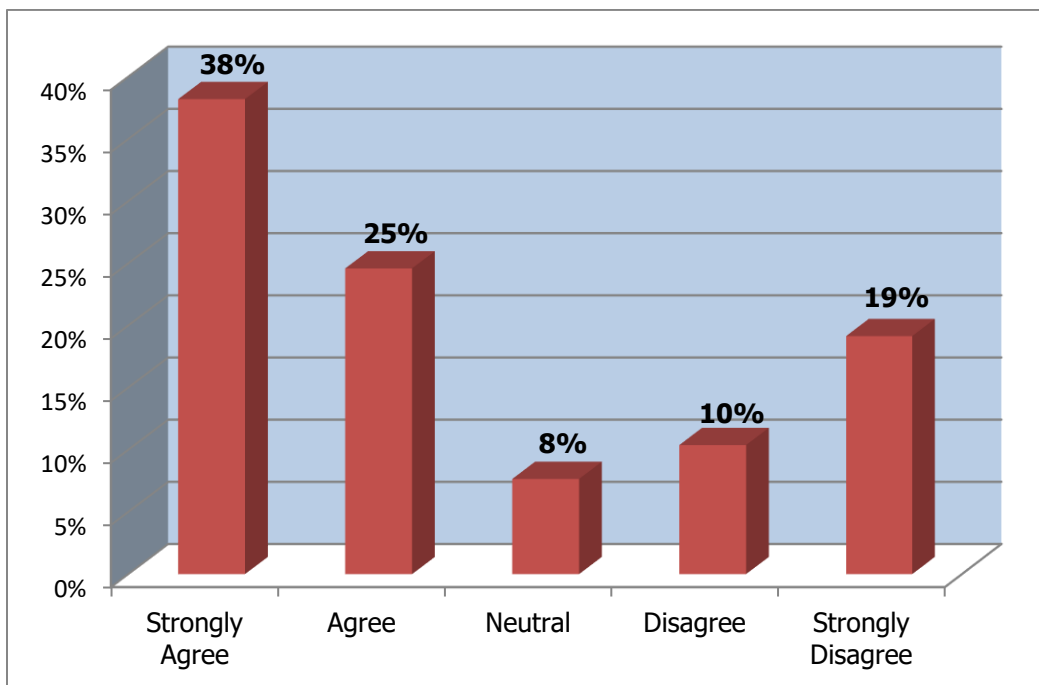| Response	Percentage
Strongly Agree	45%
Agree	23%
Neutral	9%
Disagree	8%
Strongly Disagree	15%
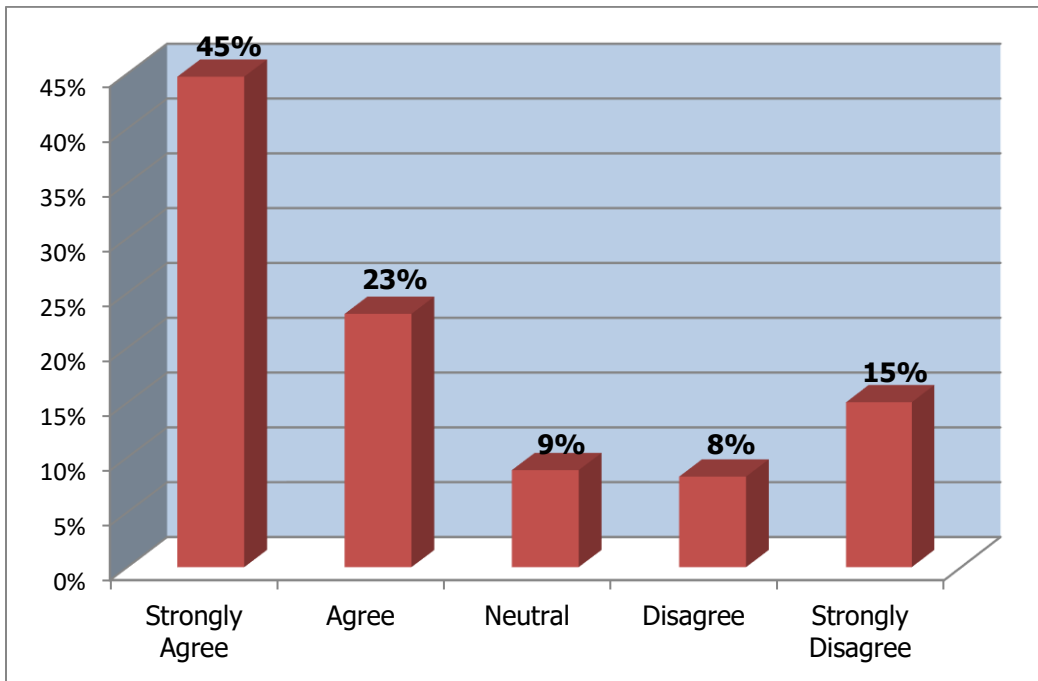
Website – "If I visited the website, it was easy to use, well organized, and contained accurate information."

Response	Percentage
Strongly Agree	25%
Agree	26%
Neutral	17%
Disagree	13%
Strongly Disagree	18%
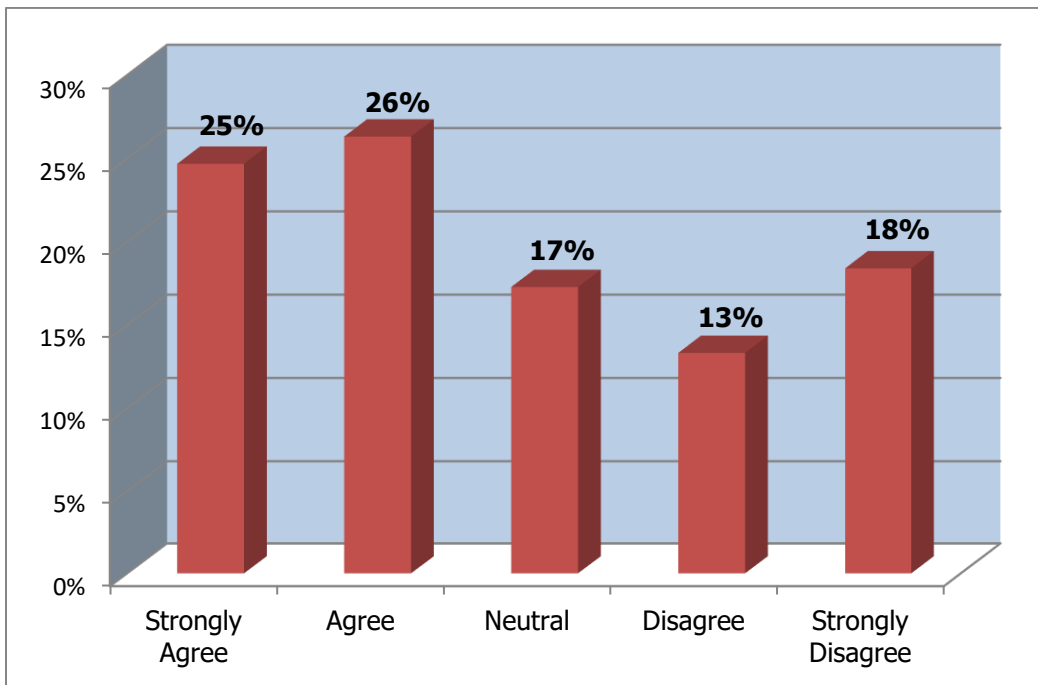
Complaints – "If I filed a complaint, it was handled in a reasonable and timely manner."

Response	Percentage
Strongly Agree	22%
Agree	14%
Neutral	14%
Disagree	20%
Strongly Disagree	30%
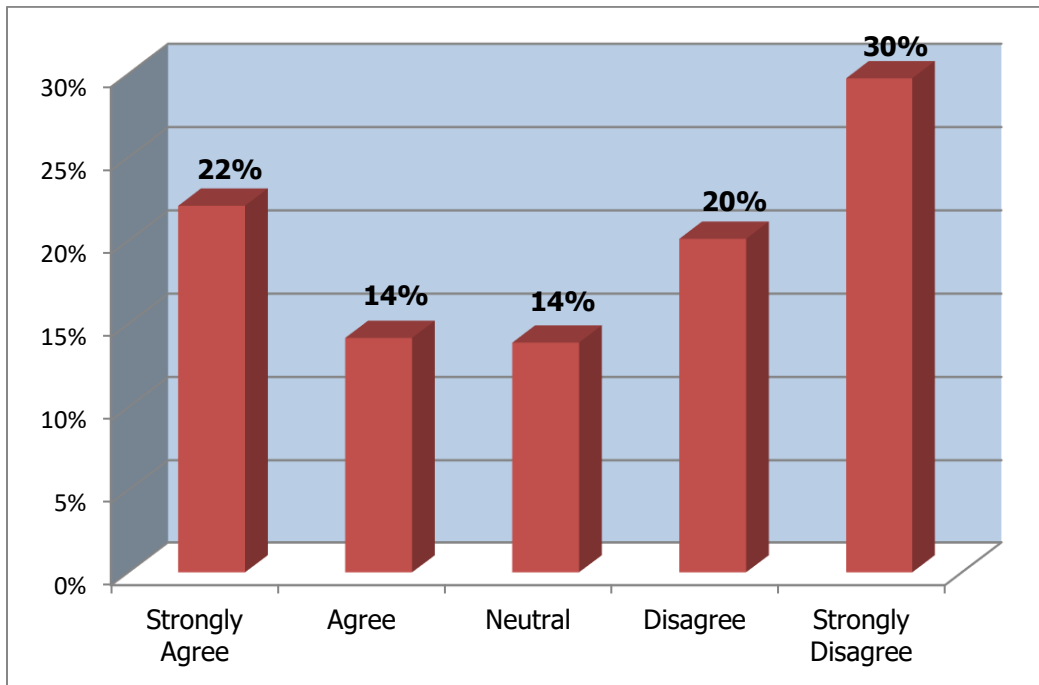
Request for Services – "If I called, wrote, emailed, or made a request for services, it was handled in a reasonable and timely manner."

Response	Percentage
Strongly Agree	38%
Agree	25%
Neutral	8%
Disagree	10%
Strongly Disagree	19%

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Printed Material – "If I received printed material, it provided thorough and accurate information."
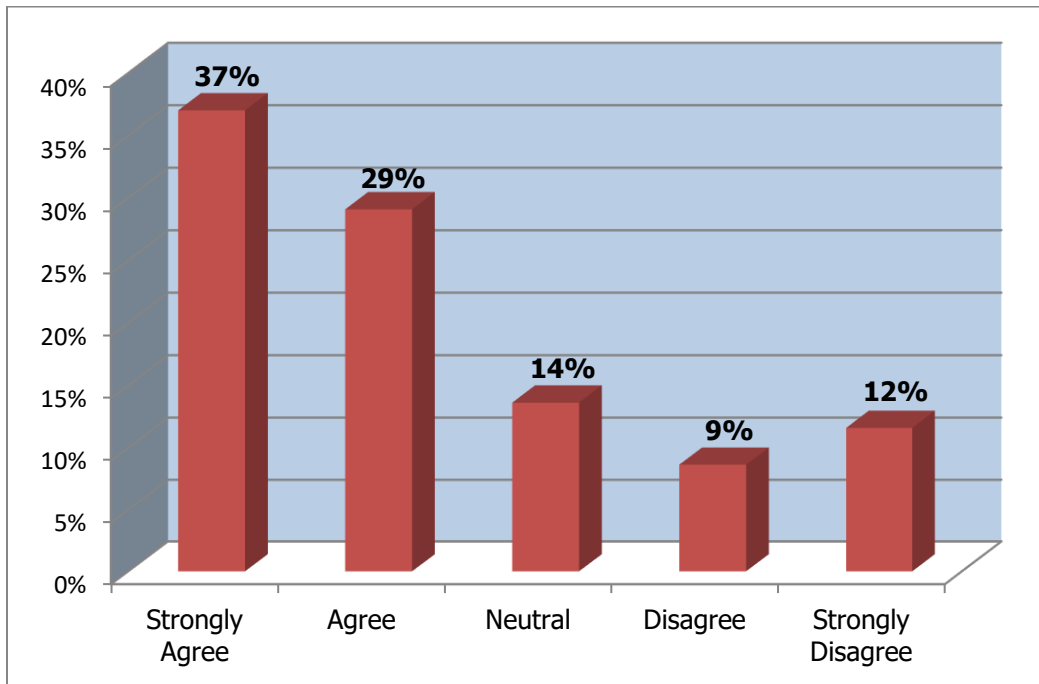
Appendix E

Customer Service Performance Measures for FY17 and Estimated FY18

This table provides FY 2017 and estimated FY 2018 customer service performance measures *(note: FY16 data from May 13, 2016 – August 31, 2016 were excluded from this chart; five new performance measures were added as notated below)*.

Performance Measures	FY17	Est. FY18
Outcome Measures:		
Percentage of Surveyed Customer Respondents Expressing Overall Satisfaction with Services Received	62%	69%
Percentage of Surveyed Customer Respondents Identifying Ways to Improve Service Delivery	7%	11%
Percentage of Calls Abandoned in Borrower Services after 20 Second Threshold (new)	15.2%	18.3%
Percentage of Calls Transferred in Borrower Services (new)	6.0%	3.6%
Output Measures:		
Total Customers Surveyed	18,361	8,800
Total Customers Served (via CRAFT System)	18,361	8,800
Total Complaints Against the Agency (new)	60	29
Total Calls Received in Borrower Services (new)	25,762	22,370
Average Speed to Answer Calls in Borrower Services (new)	4:34 mins	4:42 mins
Efficiency Measure:		
Cost Per Customer Surveyed*	$0	$0
Explanatory Measures:		
Total Customers Identified	1.6M	1.6M
Total Customer Groups Inventoried	11	11

*Survey is available on the agency's website and emailed directly to every customer who submits a request under the "Contact Us" feature on the website.

Appendix F

New Customer Response Metrics for Student Financial Aid Programs

This table provides metrics and response time goals for Borrower Services and Financial Aid Services, which are part of the agency's Student Financial Aid Programs department.

Metric	Response Time Goal	
	Borrower Services	**Financial Aid Services**
CRAFT	Next day (general inquiries) 5 days (research/processing required)	Next day (general inquiries) 5 days (research/processing required)
Average Speed of Answer	2 minutes (Compact with Texans)	2 minutes (Compact with Texans)
Average Hold Time	2 minutes	2 minutes
Abandonment Rate	5%	N/A (low call volume results in a high rate fluctuation)
Transfer Rate	6%	N/A
User Access Requests	N/A	2 days
General E-Mail Correspondence	N/A	3 days
Training Requests	N/A	3 days
Payment Processing	Next day	N/A
Originations	3 days	N/A
Account Servicing	5 days	N/A
LRP Payments	10 days	N/A
LRP Applications	15 days (from end of application period)	N/A
Forgiveness	15 days	N/A

http://www.thecb.state.tx.us

For more information, contact:

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