



September 25, 2007

To the Division of Student Affairs:

The 2007 Phantom Shopper Program (PSP), part of the Student Affairs Divisional Assessment Committee under the Division of Student Affairs at California State Polytechnic University, Pomona has been completed. On behalf of the PSP committee, it is our pleasure to present you with this executive summary.

The PSP serves as a student-led assessment tool and provides valuable information regarding services frequently used by our students. For this reason, the PSP has become a staple in the division's annual assessment of student services. This year, we are delighted to report that 60 applications were submitted by students interested in participating as a Phantom Shopper and 35 of them completed and submitted evaluations. In the end, 21 women and 14 men conducted over 230 in-person visits and over 200 phone calls and website visits to 37 departments/offices. Results indicate an impressive average of 4.2 (out of 5) across departments for their timeliness in addressing student questions and concerns. The lowest average across departments was calculated at 3.8 for the usefulness of referrals and resources given to students.

In addition to the department evaluations, student shoppers were encouraged to evaluate the PSP for future adjustments leading to a more effective evaluative process. In addition to this, recommendations from the PSP committee are included.

We would like to acknowledge all the PSP committee members for their exceptional work on this project. We would also like to thank Mr. Koji Uesugi and the rest of the Student Affairs Division Assessment Committee for their feedback and support.

The charge from our Vice President for Student Affairs, Dr. Doug Freer, was to coordinate the PSP during Spring Quarter 2007 to assess our current services in order to continuously improve how we serve our students. As this summary shows, there is not only much to be proud of within our division, there is also more that can be done to help our students achieve their potential at Cal Poly Pomona!

Yours in service,

Susan Ashe, Co-chair

Fernando Estrada, Co-chair

Committee Members:

Michelle Alba
Damian Doffo
Mery Hernandez
Yen Nguyen
Anita Roberts

2007 Phantom Shopper Program Overview

The Phantom Shopper Program is a tool used by the Division of Student Affairs at Cal Poly Pomona to assess the quality of services within the division. This assessment tool is designed to capture and report student experiences and perceptions as they evaluate various departments within the division. Although this is a valuable tool to review departmental services, it is important to note that it is a snapshot of time based on the limited experience the shopper has with the department.

Committee

The committee consisted of 7 members of the Division of Student Affairs as listed below:

Michelle Alba, *Financial Aid Office*

Susan Ashe, *Associated Students Inc. (Co-Chair)*

Damian Doffo, *James Bell Intern*

Fernando Estrada, *Pride Center (Co-Chair)*

Mery Hernandez, *Student Support and Equity Programs*

Anita Roberts, *ReEntry & Women's Resource Center*

Yen Nguyen, *University Housing Services*

Marketing and Recruitment

It was agreed that students would shop up to three departments/programs within the Division of Student Affairs. The goal of the PSP Committee was to have 40 students serve as Phantom Shoppers and to complete the Department Evaluation Tool.

Recruitment of Phantom Shoppers was accomplished by posting the PSP marketing materials at various locations on campus. 60 students returned applications and 35 students met the requirements of shopping and completing the Department Evaluation Tool.

Orientation/Training

Three identical one-hour orientation/ training sessions were offered to be conscious of the different schedules of the potential shoppers. To keep consistency within the sessions, a PowerPoint presentation was utilized so the information was the same at each session. Shoppers were required to attend one of these sessions. The committee named these "orientation/ training" sessions in order to present an overview of the program to the shoppers and they were given the opportunity to stay or leave if the program was something other than what they expected. Light snacks and refreshments were provided at each session.

During the Orientation & Training Sessions, the PSP Committee covered the background, purpose, and goals of the PSP. The PSP Committee also shared the values held by the

Division of Student Affairs. Communicating the values of the Division in conjunction with a description of PSP gave the Phantom Shoppers a framework and context to conduct their shopping.

Next, the Department Evaluation Tool was explained. The Department Evaluation Tool included six areas of assessment: Physical Environment, Quality of Interpersonal Contact, Pertinent Knowledge of the Staff, Timeliness in Addressing Questions and Concerns, Usefulness of Referrals and Resources, and Overall Experience of Department Contact. Phantom Shoppers used a likert scale to score the six assessment areas: 5=Excellent, 4=Good, 3=Fair, 2=Needs Improvement, 1=Unacceptable, and N/A=Not Applicable. Phantom Shoppers were also able to provide written comments on the Department Evaluation Tool. The six areas of assessment were covered in depth so that the Phantom Shoppers had a thorough understanding of their shopping expectations.

Phantom Shoppers were asked to conduct the following tasks for each assigned department before completing the Department Evaluation Tool:

- Two in-person visits, at different times during the day or on different days
- One visit via telephone
- One visit via website

During each Orientation & Training Session, the PSP Committee strongly communicated the necessity that Phantom Shoppers go to their assigned departments as if it was the Shopper's first visit, with a clean and objective slate. Shoppers were asked to evaluate their assigned departments both positively and critically. Shoppers were encouraged to fill out the Department Evaluation Tool in a timely fashion to keep their perspective accurate and fresh.

Phantom Shoppers were provided with a list of questions relating to each assigned department. The list of questions was created by revising the list of questions from previous PSPs. Additionally, the PSP Committee covertly asked staff members from each department about commonly asked question relating to their area. The list of questions served as a guide for Phantom Shoppers, but Shoppers were given the latitude to develop their own questions based on their experience and comfort level.

Shopping

The 37 Division of Student Affairs departments/programs were shopped between April 19 and May 18, 2007. The PSP Committee assigned departments/programs to the Shoppers as randomly as possible. For example, Shoppers were not assigned to departments/programs in which they worked nor to departments/programs for which they held a strong bias. Each Shopper worked individually and was asked to keep their evaluations to themselves until the Debriefing Session.

The PSP Committee members also acted as liaisons to the Shoppers. Each PSP Committee Member kept in touch with approximately 10 Phantom Shoppers. As liaisons, the PSP Committee Members sent deadline reminders to Shoppers, answered questions during the shopping month, and kept Shoppers motivated to complete their

Department Evaluation Tools. PSP Committee Members did not act as liaisons for students who were assigned to shop in the department where they work.

Incentives

Phantom Shoppers learned about the tangible and intangible benefits of being involved in the PSP during the Orientation & Training Sessions. The PSP Committee explained to the Shoppers that the PSP results would be presented to The Leadership Group and directors of the departments/programs shopped. They learned that their comments and evaluations were ways to have a voice on campus and that the results would be highly valued. Additionally, each Phantom Shopper who attended one Orientation & Training Session, completed a Department Evaluation Tool for each of their assigned departments/programs, and attended one Debriefing Session received a \$75 Foundation Gift Card and was entered in an opportunity drawing to win an iPod Shuffle.

Debriefing

Three identical one-hour Debriefing Sessions were offered to be conscious of the different schedules of the Shoppers. Each Phantom Shopper was required to attend one of the three sessions to turn-in their Department Evaluation Tools and to fill out a sheet of debriefing questions. Shoppers candidly answered debriefing questions regarding their experience with the PSP. The PSP Committee gathered information about the usefulness of the Orientation & Training Sessions, the benefit of the liaisons, suggestions to improve the Department Evaluation Tool, and recommendations to enhance the PSP.

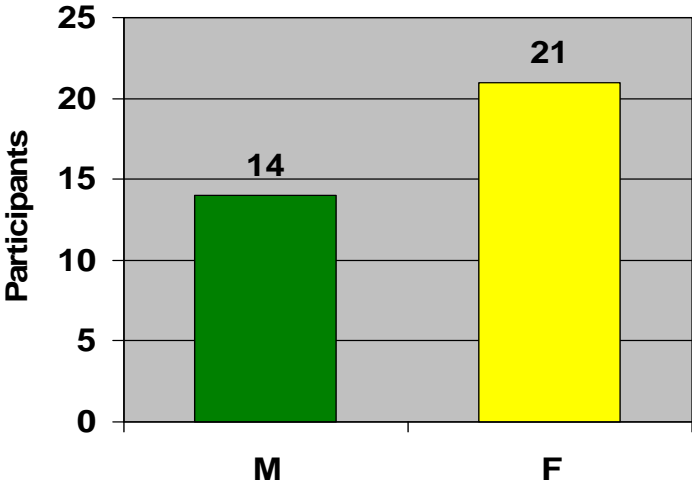
Evaluation Results

The individual departmental results were developed based on the Department Evaluation Tool submitted from each Phantom Shopper assigned to the individual departments. The Department Evaluation Tools were compiled for each department yielding an average score for each question relating to the six assessment areas. Additionally, the comments reported by the Shoppers were included in the results. Incomplete Department Evaluation Tools were not included in the final results to maintain validity and reliability.

Shoppers' Profile

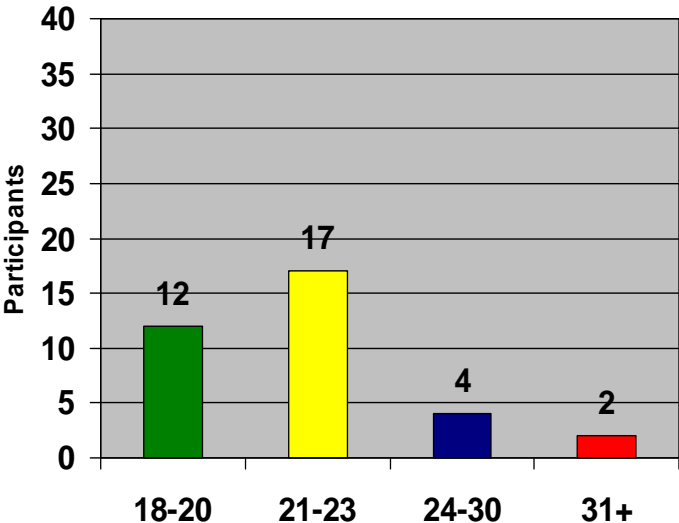
Gender Distribution

Consistent with past years, there were more female Shoppers than males.



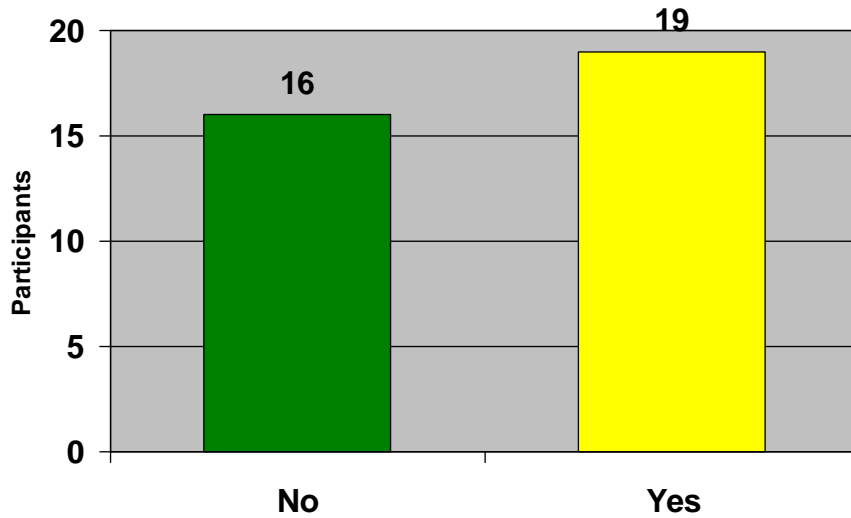
Age Distribution

83% of the Shoppers were 18-23 years old.



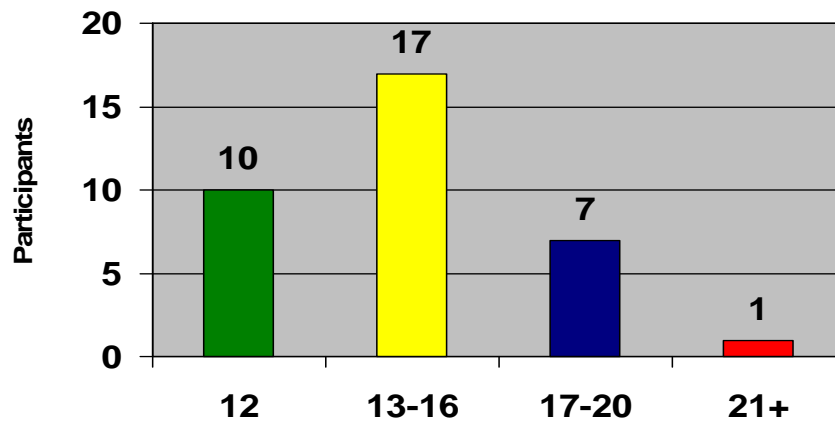
Where They Live

There was a balance of on- and off-campus Shoppers.



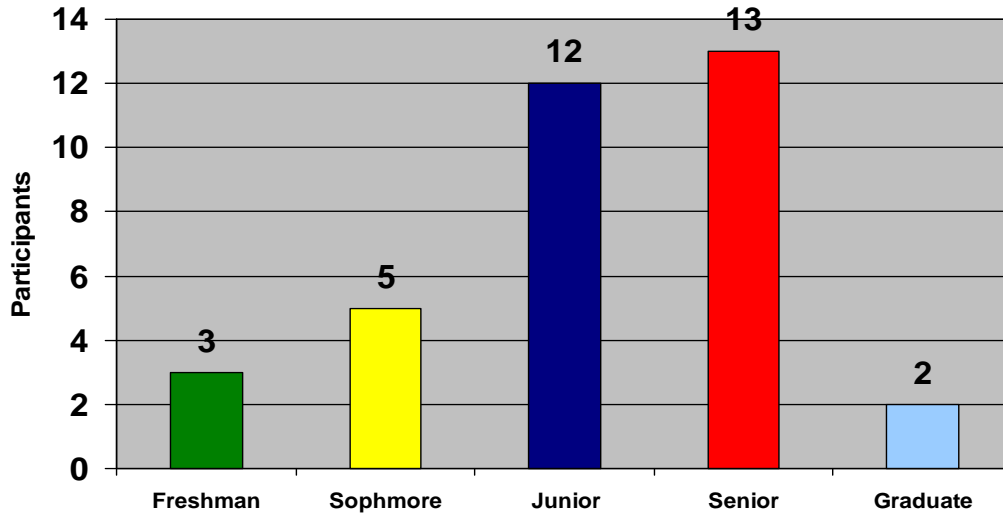
Units Enrolled

A large number of this year's Shoppers were enrolled in 13-20 units.



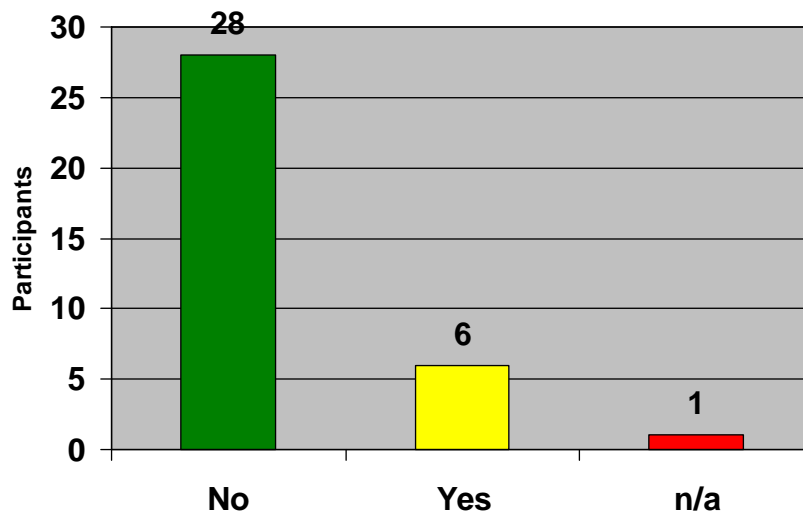
Class Standing

Consistent with past Shoppers, the majority of this year's group were upper class undergraduates.



Previous Phantom Shopper?

80% of the Shoppers had not participated in the program previously.



Interpreting the Results

The Phantom Shopper Program evaluations in this report are intended to reflect a snapshot of the departments within the Division of Student Affairs. We recognize that campus services are multi-leveled and complex in nature and thus the data gathered only evaluates a small component of the departments during limited interactions with the shoppers. In an attempt to capture the dynamic nature of student services, student shoppers were encouraged to visit departments at varying times of the day and week. The comments in the evaluations are meant to be suggestions and are not definitive.

Recommendations from the Phantom Shopper Committee

The committee would like to see more clearly defined expectations for the Phantom Shopper Program (PSP). A clearer vision of what this program is trying to accomplish will benefit the PSP for the future.

The current design of the PSP only allows the front-line of departments to be assessed. Should we not make changes to the program's design to assess the services that students receive "behind the front counter?" This would mean that shoppers would have to have more knowledge about the services of the departments they shop and in some cases, be eligible for certain services in order to receive and evaluate them.

We currently do not have specific criteria for students to be Phantom Shoppers. As we think about the future of the program, we may want to target specific student populations in order to get varied feedback. For instance, we should have a balance of highly involved students because of their knowledge of campus operations and those who are not as uninvolved since they may not be as familiar with our division's services. Also, the demographic data of the shoppers have typically reflected a very high rate of students in junior and senior standing. While their input is important, it may be good to actively target freshmen since they would serve as a good gauge of how our services meet the needs of students who are newer to the campus.

The PSP have traditionally shopped departments once a year but it may be more effective to shop them at least twice a year. Spring Quarter is a very busy time of year for the campus and this can impact both the departments and the shoppers. While the quality of our departments' services should not be negatively impacted due to the end of year frenzy that is typical in May and June, the results of the evaluation could show some differences if the shopping was done in the winter or summer. Since the PSP tends to draw a high number of seniors each year, their level of commitment as shoppers could be impacted as well during the Spring Quarter. The challenges of shopping departments twice a year are the related cost to run the PSP and the availability of staff who serve on the committee.

Recommendations/Comments from the Shoppers:

The following comments are excerpts from the Phantom Shopper Debriefing Sessions held April 17-19, 2007.

Did you feel that PSP allowed you to accurately assess the Student Affairs departments?

- Yes and no, because I am involved. It was hard to assess them because people knew they saw me on campus a lot, but what if it were different for someone who was not known?
- I think so. We got to evaluate them on all levels, customer service, phone etiquette and website information.
- Yes, it gave me room to give comments on anything I felt necessary.
- No, but it tells about first impressions which is useful, I hope.

- Yes, visiting the departments twice gives you a chance to accurately assess how they're doing and also how friendly and efficient in helping students on the phone as well.
- Yes, the students are the people that use department from school and we are the perfect people to evaluate them.
- Yes, it allowed me to experience all departments on a first impression basis (which is most important).
- No, more in depth time needed to be accurate on help
- It will never be 100% accurate. I think everybody has his or her own biasness
- Yes, assuming that those who I spoke to didn't think I was phantom shopping
- Yes, I could come to these departments with genuine uncertainty of services they offered since I was assigned department I had not really visited before

What did you like best/least about PSP experience?

- The experience to evaluate departments and know my comments might help.
- I enjoyed just walking into an office prepared with questions, also the fact that they were answered.
- What I like best is finding out various services they offered and learning a lot of information about it.
- The best thing was that I was able to learn about departments that I never visited before.
- The incentives were the best.
- I get to voice my opinions about bad departments and compliment others that were helpful.
- Awkward asking questions at first.
- I enjoyed interacting with the different staff members from the departments I visited.
- People & offices were on their best behavior because it was known about PSP
- I got paid for my time, what I didn't like was I had very little say about where to shop
- A chance to visit the departments in a different light, more specifically-critically, in an evaluators' perspective
- I learned things about other departments I never knew about
- I didn't like it when I couldn't get in contact with the people
- Finding time to go was the hardest part, but getting more info was fun
- The times of the orientation and debriefing were hard to maintain
- What I like best about PSP experience was that we the students are given the opportunity to evaluate and express unbiased opinions at these departments visited

What are your recommendations to improve the PSP?

- [Shopping] could be done with weekly deadlines and more reminders of departments to shop
- [The Phantom Shopper committee] should think of more realistic questions to ask those places
- [The evaluation sheet] could have a section on how easy it was to find the place (i.e. location available on the internet?)
- Give out a map with your departments highlighted
- Maybe a better match to the assigned places we have
- More time to conduct shopping.

- Try to make the PSP in different quarters, not just during spring.
- Maybe increase the length of time to survey and number of departments visited.
- Nothing really, just mix up times because departments know when PSP is happening and put out the [We] Care surveys, but I don't always see them at other times.
- I have no recommendations. I believe this opportunity is a great service of itself to students, please keep it up
- I think that the shopper should make up some of the questions.
- Advertise on Facebook

Do you feel the compensation is adequate?

- Sure, there is not a lot of work involved
- Yes, it's a nice incentive to truly look at all aspects of the department
- Hell yeah
- Yes, more than adequate
- Real cash not just bronco bucks
- I had a good time doing this. It gave me better insight about my school and the compensation's not bad either!

Please share any additional comments?

- I had a good time doing this. It gave me better insight about my school and the compensation's not bad either!
- I think this is a very great program. It should continue for many years to come.
- Nothing really, just mix up times because departments know when PSP is happening and put out the care surveys, but I don't always see them at other times.
- Overall, being a PSP was a pleasant experience and I would love to participate again next year.
- This is a good experience. I got to meet people and visit departments I never knew existed or knew nothing about them.
- I think it is a program that should continue, because it will give great feedback to departments.
- Wonderful program, my friends were jealous they didn't sign up. It was fun to "act" at the different departments.
- I strongly agree with this program because it really helps and also gives the students to know more about the school.
- I am happy to be of some service, plus I feel good about the fact that my thoughts are valued.
- Everything went well and the lectures and the liaison were very helpful and it was a good experience.