

**University of Wisconsin-Whitewater  
Division of Student Affairs  
Bookstore Services**

**Office Program Review (OPR)  
Executive Summary and Action Plan**

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**EXECUTIVE SUMMARY**

**Part One -The OPR Process**

This report provides the results of an extensive study and assessment of the Office of Bookstore Services at the University of Wisconsin-Whitewater. Each office in the Division of Student Affairs undertakes this study and review, called an Office Planning and Review (OPR) on a regularly scheduled basis.

The review process was conducted by three separate groups:

- 1) A Self-Study Review Team consisting of all Bookstore Services Staff
- 2) A Campus Review Team consisting of campus faculty, staff, and students
- 3) An External Review Team consisting of three outside consultants provided by the National Association of College Stores as part of their store evaluation service.

After data and information collection using customer surveys, personal interviews, group meetings, and a thorough review of written policies, documents, and publications, each of the three OPR review groups submitted a list of recommendations to the Director of Bookstore Services. While all three groups found numerous strengths within the programs, staff, and operations of Bookstore Services, there were recommendations that were prevalent in each review report. These recommendations were then summarized into six different categories as listed below in Part Three, The Action Plan.

**Part Two- Overall Conclusions**

“This evaluation is reflective of the results of the University-conducted assessments of Bookstore Services. The store **generally meets all of the standards** for an established professionally-run college bookstore. Bookstore Services is **sensitive to the needs of the University** and has an established track-record of **fulfilling its own mission**. Store **staff are well trained and knowledgeable** about the industry, are **well respected on campus**, and are **active in the college industry**. **Financial expectations**, while generally unstated,

are being realized." Quoted from the National Association Of College Stores Consultants Report dated March 28, 1997.

### **Part Three –Recommendation Summary/Action Plan**

**CRITERION 1-THE COLLEGE STORE’S RELATIONSHIP WITH THE CAMPUS COMMUNITY.** This criterion assesses the college store's relationship with the campus community, addresses the mission, and examines the interaction between it and a unique community environment composed of students, faculty, administrators, staff, local businesses, and others.

#### **Recommendation Summary**

Format mission statement into key words or bullets and publish in university literature; explore partnerships with other areas on campus for sales and promotions; review the campus master plan to determine how best to reach potential customers using the proposed information center, traffic patterns and signage.

#### **In Progress**

The mission statement was reformatted and included in the Undergraduate Bulletin and will be included in other university publications. Partnerships with other areas on campus have been established for the sales and promotion of Bookstore Services including Salute To Grads Program, Early Childhood Conference, World Affairs Seminar, PREVIEW, On-Campus Days and author signings.

#### **Short Term Action Plan**

Exterior signing for the Bookstore will be ordered.

#### **Long Term Action Plan**

Explore ways to use the campus master plan and the proposed information center to promote the bookstore and make it a campus focal point.

**CRITERION II -MANAGEMENT AND ORGANIZION OF THE COLLEGE STORE.** This criterion assesses the management style of all levels of the college store and the store's organization as it meets the goals and objectives established for the unit.

#### **Recommendations Summary**

Develop a strategic plan for the Store to include financial and operational expectations, how the Store can benefit from the campus master plan, Store renovation, the role of the Store in providing hardware and software to the University, copyright clearance, sharing of staff between areas and the development of a succession plan for key positions in Bookstore Services. Develop and implement a formal method of performance evaluations for student employees.

### **In Progress**

The Store does sell computer software and is further exploring its role in the sale of hardware to the university community. The Store now provides copyright clearance information to faculty and will explore ways to expand this service.

### **Short Term Action Plan**

Find new ways to share staff between areas and develop a succession plan for all key positions. Develop and implement a formal method of performance evaluation for student employees.

### **Long Term Action Plan**

Develop a strategic plan for the Store to include financial and operational expectations, store renovation, and involvement in the campus master plan.

### **CRITERION III- OPERATING PROCEDURES IN THE COLLEGE STORE.**

This criterion addresses how well the store has developed policies and procedures and how they have implemented them into all facets of the operation.

### **Recommendations Summary**

Date all policies and procedures and conduct an annual audit and revise as necessary.

### **Short Term Action Plan**

Date all policies and procedures, conduct performance audits annually.

**CRITERION IV -INVENTORY MANAGEMENT. This criterion addresses the tasks involved in running various merchandising departments in the store, and is designed to elicit information about the policies, procedures, and systems that are in place in the departments.**

### **Section A -Textbooks -Recommendations Summary**

Expand the use of PUBNET and electronic ordering in general; track the number of book titles and courses in Textbook Rental and Bookstore; market savings to students through the purchase of used textbooks; investigate the direct sale of textbooks by faculty to students; and, place renewed emphasis on course pack sales and copyright clearance services.

### **In Progress**

All components are in place for PUBNET use, and book titles and course information are collected and reports are being developed through the Riverview system.

### **Short Term Action Plan**

Renew efforts to market used textbooks to students. Explore the need for expanding copyright services to faculty beyond what is now being done. Explore the extent to which faculty sell directly to students by passing the Bookstore.

### **Section B -General Books -Recommendations Summary**

Use departmental library requests and honors programs reading lists as sources for titles for the general book department; conduct faculty author signings in the Store; use Riverview Software to track unit inventory levels on a unit or by-title basis; develop an open-to-buy analysis where appropriate; increase the number of remainder sales.

#### **In Progress**

Many departmental book requests are developed as a result of faculty visits to the Bookstore to select from titles in stock. With the new Riverview point-of-sale software program, open-to-buy analysis and tracking book titles is feasible.

#### **Short Term Action Plan**

Conduct faculty author signings in the Bookstore when opportunities arise. A formal reminder policy will be developed.

### **Section C -General Merchandise -Recommendations Summary**

Implement open-to-buy; plan clearance and promotional markdowns; and, move to item level inventory control.

#### **In Progress**

Open-to-buy analysis is being used in the clothing department and will be expanded as appropriate. Clearance and promotional markdowns are part of normal operating procedures.

#### **Short Term Action Plan**

Item level inventory control will be expanded beyond the book department as cost benefits of doing so are determined.

**CRITERION V -COLLEGE STORE MERCHANDISING PROGRAMS. This criterion assesses the basics of merchandising programs and the utilization by the college store of display, promotion, and effective selling to create an attractive atmosphere resulting in customer confidence, satisfaction, and good will.**

#### **Recommendations Summary**

Develop a market analysis and open-to-buy for each product category; develop a signage program; light the display cases; renovate the Bookstore and Textbook Rental areas; implement interim changes in product mix and merchandise presentation; evaluate product mix in the Convenience Store; add bulk candy, health food section, branded frozen products, pre-paid phone cards and expanded grocery size cookie and cracker selection, develop a feature area, review pricing on beverages, consider a cooler for storage of back up merchandise, and consider assigning management of Convenience Store to a full time manager in the Bookstore.

#### **In Progress**

Open-to-buy planning is being used in the clothing department and will be evaluated for other major merchandise areas. Product mix and merchandise presentation are continually evaluated and modified. Bulk candy has been added to the Convenience Store

inventory and pre-paid phone cards are available in the Bookstore. Beverage pricing and product mix are routinely reviewed, and the pricing schedule for beverages was changed last summer.

### **Short Term Action Plan**

Develop a written signage program, light all display cases, renovate the Textbook Rental Customer Service Area, review product mix and merchandise presentation, consider a health food and branded merchandise sections in the Convenience Store.

### **Long Term Action Plan**

Consider developing a market analysis for each product category in the Bookstore, plan a major remodeling of the Bookstore and Textbook Rental, consider assigning management of the Convenience Store to a full time manager in the Bookstore. Explore the possibility of building cooler space for storage of beverage back stock.

## **CRITERION VI -FINANCIAL PLANNING, REPORTING AND CONTROLS.**

**This criterion assesses the financial performance of the college store through a review of its accounting procedures, budgeting process, financial reports, and financial controls.**

### **Recommendations Summary**

Develop a personnel budget for each area, work with the University Controller to interface the Riverview POS System with the University Financial System. Investigate changes in security of cash transfer and the cashier's office. Develop monthly income statements for each merchandise department, review Bookstore pricing structure in light of university financial expectations for the Bookstore.

### **In Progress**

Consider expanding the scope of the personnel budgets for each area. Evaluate the need to change some cashiering procedures to improve security.

### **Short Term Action Plan**

Investigate the need to develop monthly income statements for each merchandise category. Review the Bookstore pricing structure in light of possible changes in University financial expectations for the Bookstore.

### **Long Term Action Plan**

Work with the University Controller to interface the Riverview POS System with the university financial system.

## **OVERALL CONCLUSIONS**

### **Recommendation Summary**

Explore ways to make the Bookstore a destination point on campus, finalize the Bookstore's strategic direction including administrative involvement in the establishment of financial expectations. Plan for renovation of facilities and include a store designer at

the earliest stage of planning, develop and articulate a plan for management succession, develop an open-to-buy plan for each merchandise area.

### **In Progress**

An open-to-buy plan is being utilized in the clothing department and is being evaluated for other merchandise areas.

### **Short Term Action Plan**

Look for new ways to make the Bookstore a destination point on campus. Work with university administration to finalize the Bookstore's strategic direction including the establishment of financial objectives. Develop a plan for management succession.

### **Long Term Action Plan**

Plan for store renovation utilizing a store planner in the early stages of planning.

### **OUTSOURCING**

The results of the OPR process confirm that UW-Whitewater has a well-managed store responsive to student, faculty, and staff needs. The Bookstore utilizes current technology and is prepared to meet the current and future needs of the campus. Based on the recommendations of the total OPR, it is our recommendation to continue with university management of the Bookstore.

The Bookstore needs extensive remodeling to provide a vibrant, dynamic shopping environment that meets the standards of a modern retail store in design and functionality. The remodeling project is approximately a four- to five-year time commitment, and at least a \$300,000 investment. The cost of remodeling will have to be financed through bonding and repaid over a period of years. Bonding will require store margins to be increased from the current low end of the range to an acceptable mid-range level.

UW-Whitewater has traditionally embraced a student-centered Bookstore philosophy. The University Bookstore annually contributes to University and Division of Student Affairs overhead, and budgets assistance of donations to campus and community organizations. Although outsourcing is an alternative to an institutionally managed bookstore, there are disadvantages including loss of institutional control, higher prices, and conflicting goals of profit versus academic support. Should outsourcing be considered, a committee would want to thoroughly study outsourcing versus institutional management using guidelines set forth in the book **Contract Management or Self-Operation** sponsored by The Council of Higher Education Management Association. Excerpts relating to bookstore management are attached.