Guidelines for Creating Student Services Online

Lessons Learned

The overview, phases, and cross-phase issues sections provide in-depth information about the process of creating online student services. These lessons learned are the big-picture perspectives articulated by the LAAP project participants.

Philosophy

- **It's about people, not technology**
  Moving student services to the online environment is primarily a challenge of leading people in a new direction. Dealing with politics, policies, practices and culture are human, not technical, issues.

- **It's time to end the silos**
  Student services have developed over time as the need for them arose on campus. Many have separate policies, practices, and technical infrastructures. New technologies make it possible to integrate services into a cohesive system of student support. This requires re-engineering student services — designing new policies and practices — and takes a cross-functional campus team to make it happen.

- **The user is king**
  Web-based services should be designed from the users' perspective. Students are primarily task-oriented — they want to pay a bill, run a degree audit, schedule an appointment — and they don't want to think about which department provides what service. They prefer a single sign-on to integrated, personalized and customized services and the options of self-service, general help and personalized assistance. The full range of optimized services includes online and real-person/real-time resources.

- **Internal consistency and integrity are vital**
  The extent to which an institution puts its student services online should be consistent with its mission, culture, and priorities. If an institution is enrolling distance students in online courses, it must provide those students with accessible services of equal quality to those for campus-based students. Otherwise, these students cannot be expected to succeed at the same rate and it calls into question the institution's commitment to learning for all of its students — not just those privileged to come to campus.

- **Technology should enable new services, not define them**
  At a rapid pace, new technologies are coming onto the market. New versions of existing software are common. In envisioning new services, the focus should not be limited by what is possible today. By defining the ideal and then

phasing in the solutions as the technology becomes available, the best service will result.

- **Outside experts move projects forward**
  Outside experts bring a broader perspective and objectivity into the project that can help transcend campus politics. Scheduled visits from a consultant in organizational change or best practices in online student services also provide motivation for project teams to accomplish goals. In some cases, the expert may not bring new expertise, but rather validate what the campus is doing — and this can be equally important to project progress. The LAAP project partners identified site visits as one of the most important influences in their success.

- **Distance staff should take a leadership role**
  On many campuses, the staff of the division of continuing education or other outreach unit has provided both the courses and the services for distance students for many years. They have tremendous expertise in providing remote service that is convenient and just-in-time. As today's campus population looks increasingly like the distant population, it is important that this experienced staff be tapped as a valuable resource in the redesign of services to support all students.

- **Developing decentralized services means focusing on the commonalities while respecting the differences**
  Perhaps as much as 80% of a service is the same across campus, but the last 20% can vary significantly. The trick is to design a system that builds on the commonalities with the flexibility to accommodate the differences via customization. That means understanding the needs, processes, and policies of each college/department/program in enough detail to make the system work for them.

- **First things, first**
  It is ideal to put the administrative core services — admissions, registration, financial aid, student accounts — online first so that you can build upon them. These centralized services have many established rules, regulations, and operating procedures so it is easier to achieve consensus about what the new services should be like. Then you can move on to the decentralized ones where each department may have its unique needs.

- **There will never be enough time or money**
  Re-designing student services with technology applications costs money and takes time, particularly in the startup phase. Projects will expand to fill both limits so it is better to get started than wait for the perfect combination that may never come.

Infrastructure

- **It's easier to pick a solution than define the problem**
  The technology solution is the easy part. Deciding WHAT a service should be like and communicating that to others is the hard part. It's critical to take the time to adequately define the WHAT.

- **The student information system and portal play key roles**
  Student information systems (SISs) and portals play critical roles in the provision of personalized and customized student services.

- **It may be old, but it still works**
  There is no one system that will support all of the student services. There will always be a need to integrate new functionality with old functionality. Also, the solution may include using some functionality in your existing system, not previously utilized. It is important to understand the functionality of all automated systems so that they can be used to their fullest extent, even if consultants and extensive training must be employed. Under-utilization is wasteful and expensive.

- **The problem may be the interface, not the infrastructure**
  All the information a student or staff may need in a service may be Web accessible, but the format may not be user friendly. By developing a graphical interface with format options — e.g., different views with cascading options — users may be better served.

Inclusion

- **All students want access to online services**
  Distance students need access to the same range of services on-campus students need.

- **Everyone gets served**
  Students and staff with disabilities have a moral and legal right to information and services. It is easier to plan for their inclusion from the beginning than to alter a design later.

- **Diversity wins**
  There are many different kinds of students and so there is no one right way to design new services. The more inclusive the project, the more likely the result will serve the full student body. Having the project team members assume a variety of student roles — first year student, part-time student, distance student, student with disabilities, graduating senior — can help to ensure that needs are met at each phase in the project.

- **A picture is worth a thousand words**
  Demonstrating what other campuses are doing via live presentations, Web casts, or streaming video help others think differently. If some of the key leaders cannot attend live presentations by representatives from other campuses, make a videotape for viewing at a convenient time.

- **Fear can derail a project**
  There is always some staff that fear losing their job as a result of a re-engineering project even when that is not in the plans. Keeping everyone informed about project progress and offering staff training programs can help allay this fear.

Leadership

- **Support from the top is essential**
  To succeed in re-engineering student services, the commitment of the top campus leadership is critical. Without it, staff will not invest the time and effort to make the project successful.

- **The project leader makes a difference**
  Project leaders need leadership skills, an understanding of the institution's culture and policies, and a commitment to the successful completion of the project. A leader does not need to be a subject matter expert in student services or technology. He or she will have fewer preconceived notions and more likely to listen to all members of the team.

- **Communication, communication, communication — it's not possible to do too much**
  It's critical to leave no one guessing about what is going on in the project and why. A project Website helps!

- **Commitment, belief and tenacity prevail**
  Many of these projects are long term and time consuming. A good team can support itself through the peaks, valleys and lulls in activities over the course of the project. The project leader should encourage team spirit especially in the early phase when the project is still nebulous.

- **A stable core team is ideal**
  Those projects that start and end with the same team can usually move faster because they are not stopping to re-educate new members.

- **At a certain point you must hold hands and jump**
  Earning trust and trusting others to work together is one of the most challenging and time consuming aspects of a project like this. In the cases of cross-functional teams, this may be the first time some of the individuals have met one another so it will be necessary to move slowly at the beginning to move faster later on.

- **Regular meetings keep a project on track**
  On most campuses, staff has many competing interests for their time and effort. With regular project meetings, it is easier to keep the momentum going for a long-term project such as re-engineering student services.

- **Everyone likes to know they are doing well**
  Periodic publicity and recognition for involvement in a project keeps people committed. This is especially important in long-term projects. Both internal and external publicity are desirable.

- **Internal champions are desirable and often necessary**
  Re-engineering projects often need project champions to "sell" the project throughout the campus. A team member from the marketing department can

help organize a plan and assist in identifying the ideal messengers for different audiences.

Process

- **A risk-taking atmosphere is essential**
  A relaxed and comfortable atmosphere will help project team members brainstorm to elicit the best ideas for re-engineering existing and inventing new support, services, and systems. A retreat or workshop are good ways to kick off such projects.

- **People, process, and data make the whole**
  Redesigning a service means looking at all of its components: people, process, and data. It does not mean "Web-enizing" existing services.

- **A cross functional team is key**
  To integrate student services and create a new way of serving students, institutions need broad representation from admissions, registrar's office, student services, disabilities services, marketing, faculty, IT and students.

- **Focus on what is doable**
  There is much to be done, but you can only accomplish what you have the time and money to do. Defining the scope early is critical to ultimately achieving your goals.

- **First clarity, then conversation**
  There are subtle differences in the meaning of various terms across campus. For example, in one department of one of the colleges in the LAAP project, there were four different definitions of academic advising. Another example: When does a student become a student/stop being a student? By creating a glossary with "also known as" (aka) notations, it is easier to keep everyone on the same page as new services are designed.

- **Correction is easier than creation**
  Some exercises are difficult as a team — especially when you get to details of new services. It is easier for a subset of the team to draft scenarios, for example, and then have the team and other subject matter experts correct them.

- **IT professionals speak a different language**
  Often IT professionals and student services professionals think differently. By using scenarios to describe the kinds of services student services professionals would like to have, the IT staff can better understand what is desired.

- **This is not a time to be bashful with your demands**
  As a project team, you should feed your software suppliers — your IT staff or vendors — with your requirements and explain the demands of those requirements so that new software will satisfy your needs and wants.

Otherwise, you will get what the supplier wants to give you. Note: This may take some strong demands and resistance.

- **Small steps lead to giant leaps**
  By piloting a service with a small group of students and demonstrating success, it will be easier and faster to expand the service to the rest of the campus.

- **The job is never done!**
  There are always ways to improve a service. Each version stimulates new ideas for making it better.

Collaboration

- **Collaboration takes more time**
  More partners mean more approval processes and more time spent in communication. Some campuses work at different speeds so sharing a joint timeline has its challenges.

- **There has to be a compelling reason to collaborate**
  There is a difference between trying to collaborate in the design of a joint service and in sharing information about efforts to create new services. There must be compelling reasons to try the former as more time and effort will be necessary. Trying to force collaboration between unlike projects or campuses can waste time and resources.

- **"Coopitition" can be a good motivator**
  Competition — or "coopitition" — among partners provides external motivation and leverage to accelerate a campus moving forward.

- **Intellectual property issues can be a stumbling block**
  Some campuses are more skeptical than others of collaboration. It can take a long time to get people to trust one another when the discussion turns to using technology to support student services. When non- disclosure agreements are required by a corporate partner, fewer campus individuals participate.

- **Public companies march to a different drummer**
  In today's economy quarterly reports to stockholders drive public companies to change direction and personnel more frequently than academic institutions. Partners must adapt to the pace, renegotiate understandings, and be prepared to alter their course as necessary.