The Help Desk Priority Work Group first met on January 27, 2004 and held seven meetings during the spring 2004 semester. Work group processes included reading and research assignments, discussion, guest speakers, and small group activities.

**Charge:** In Collaboration with the Student Services Quality Service Model - High Quality Change/High Volume Collaboration (HVC2) Project, the Student Success Help Desk Concept Priority Work Group will develop an integrated overall quality service model to deliver information services (in-person, phone, e-mail, etc.), including all Student Success services, to students. In cooperation with Information Services, define specific services needed by students and explore and design a model for delivery of these services. The HVC2 student services project participants will report to and receive feedback from the larger Student Success Help Desk Concept

**Outcome:** Position the University to implement an integrated quality service model to deliver information services to students.

**Participants:** Michele Eodice, Writing Center, Leader
Kathryn Nemeth Tuttle, Office of the Vice Provost for Student Success, Facilitator
Lisa Beck, Admissions and Scholarships
Mark Pickerel, Academic Technology Services
Rueben Perez, Center for Campus Life
Pam Botts, Counseling and Psychological Services
Ann Eversole, Dean of Students
Lesa Marbut, Freshman Sophomore Advising Center
Jan Brummell, Hilltop Child Development Program
Michele Kessler, Legal Services for Students
Gene Wee, KU Memorial Unions
Hollyce Morris, New Student Orientation
Kim Bates, Services for Students with Disabilities
Stephanie Covington, Student Financial Aid
Bill Smith, Student Health Services
Tara Vereen, Student Housing
Kent McAnally, University Career & Employment Services
Joan Hahn, University Registrar
Sandra Reed, Office of the Vice Provost for Student Success
Cheryl Saladin, Student Financials/Bursar
Karen Huettenmuller, CLAS Undergraduate Services
Stanley Loeb, Environmental Studies, Faculty
Shanda Powell, School of Business
Bob Turvey, Peoplesoft Student Administration
Sean Ringey, Student representative

Guests invited to give presentations and share information included: Julie Loats KU Portal; Bob Turvey, Peoplesoft Administrator; Sue Silkey, ACS help desk; and Cheryl Saladin, UM One-Stop.
Overview:

The following report incorporates the work and recommendations of both the HVC2-Student Services Group as well as the Student Success Help Desk Priority Group. Since the vision for a “help desk” model is one of integrated and collaborative campus-wide services, group leaders and members strongly believe it is important for the report to reflect this commitment.

Both groups agree that the universal help desk will handle questions and referrals based on a wide range of student, staff, faculty, and community needs, including, but not limited to, financial aid, enrollment, access to Portal, advising, campus events, deadlines, bursar, ResNet, and emergency information.

While our current help services are not “broken” in the sense that we already have excellent staff in various offices across campus addressing student information needs, the idea of unifying help desk services under one umbrella is appealing and timely. In fact, the current “help” delivery method was described affectionately as “cow paths”—well worn, familiar, and formed by old habits. We all readily agreed that a new “route” to send and receive information was necessary and a vision of a universal help desk emerged. A universal help desk for KU will be based on a coordination of many offices and services, including technology areas, libraries, and Student Success. A help desk is typically a symbolic object but carries a message to students, faculty, staff, and the community that there is a reliable, consistent source of information available. With a tiered help desk we could offer several methods of service delivery. We envision a universal help desk that handles questions and referrals based on a wide range of student, staff, faculty, and community needs, including, but not limited to, financial aid, enrollment, access to Portal, advising, campus events, deadlines, bursar, ResNet, and emergency information.

Basic assumptions that underlie our ideas:

- Students should not need to understand how the university is organized in order to utilize services; departments must overcome a “silo” mentality and break down barriers.
- Students need a universal help desk that is seamless in structure, easy to use, highly visible and identifiable, and reliable.
- Students need services in multiple formats, (in-person, phone, e-mail, Instant Messaging, etc.) and assurance that all service formats are accessible for all, including those with disabilities.
- Students need support that anticipates their increasing reliance on technology.
The work groups identified the following major components of a quality student service/help desk model for the University of Kansas. We believe these components will be necessary for achieving a successful outcome.

- The model is universal, highly visible, and flexible in both virtual and physical ways, offering the sense of a “one-stop” environment for all university locations and constituents.
- The model includes multiple service formats with “touch points” at multiple campus locations, including walk-up windows/desks, web-based information and tutorials, and digital kiosks, as well as instant messenger, chat, email, and phone hotline capabilities.
- The model should reflect cutting-edge technology and upgrades, and predict technology needs regularly.
- The model identifies and serves diverse constituents, including students at all KU campus locations; the model is ADA compliant and sensitive to the needs of all potential users, including parents and other family members, faculty, all University staff, and the greater community.
- The model includes quality human contact along with virtual contact, ensuring not only face-to-face opportunities for assistance but other forms of in-person and electronic contact: voice, chat, etc.
- The model depends on the support and participation of key representatives from offices across the campus.
- The model should be developed and maintained by expert staff (both generalists and specialists) who are supported through their respective units; this work could be seen as a professional development opportunity; the impact of participating in this work on office staffing and resources should be recognized.
- The model requires student input in design and in implementation and should remain responsive to ongoing student needs.
- The model includes continuous training for peer coaches, generalists, and specialists; provides reinforcing modules to orient/instruct new and experienced employees; ties in with HR and staff development.
- The model includes several mechanisms for collecting ongoing feedback and assessing services.
- The model must be friendly, accessible, efficient and convenient for users, no matter which method of service delivery.
Case Study: I-Enroll Demonstration Project

We had an opportunity to test the components of the model through our I-Enroll Demonstration Project. Three main service components were developed to add support to the enrollment process during the spring 2004 enrollment period.

- Call center (involving the Enrollment Center, KU Info, Computer Center Help Desk and ResNet)
- Online tutorial (developed with enrollment center staff, PeopleSoft consultant, and library staff)
- Peer-to-peer desk side coaching (student assistants trained and scheduled to provide in-person help at designated sites)

-See Appendix for full case study of the i-enroll demonstration project

Key elements of the project included:

- Coordination of offices on Lawrence, KU Medical Center, and Edwards Campus
- Almost 50 students and staff involved
- Training meetings (2)
- Phone hotline number in call distribution center (several offices)
- Web page directory
- Kyou Portal support
- Kyou Portal survey channel
- Main KU web page: i-enroll button and link placement
- Online tutorial
- FAQ page
- Printed information packets
- Ability to email a web page to a friend
- Online chat capabilities
- Peer-to-peer desk side coaching
- Marketing efforts: identifiable logo, t-shirts, signs, press exposure
- Collaborative sponsorship: funding from SS and IS
- Internal web site functioning as a status alert/bulletin board, online scheduling tool, and central source for staff info

Assessment

✓ Brought many people together who would otherwise not be communicating about enrollment
✓ Demonstrated effectiveness of a call center utilizing current help desks in the Computer Center, Enrollment Center, KU Info and ResNet
✓ Offered opportunities for student involvement/employment
✓ Harnessed skills of students already working in help areas
✓ Demonstrated the need for a coordinated help effort using multiple methods of service
✓ We learned a little bit more about what students need/use/prefer
✓ Needed more time for planning and communication in the early stages
✓ Needed all constituents to understand that this was a pilot not an implementation
✓ Needed to know more about staff responsibilities and roles of offices in advance
✓ Needed to plan data collection and assessment of project in advance
The model we envision basically flips the triangle on the left to allow for more electronic and remote transactions and utilizes cross-trained students and staff to act as generalist assistants. This model allows the specialist then to focus on cases that require their input, placing staff and technology at the front-line, increasing speed of transactions, and providing the convenience of a one-stop environment.

The peer assistant level is an expanded level inserted between the self-help and the staff generalist. Both peer assistants and staff generalists will be cross-trained beyond their home office area of expertise and provide front-line contact with students, staff, faculty, and community in answering questions and referring as needed.

**Flipping the Service Triangle**

![Service Triangle Diagram](attachment://service_triangle.png)

**KU Examples**
- Overdue library notice
- Enrollment e-mail notice
- Renew books online
- Enroll & Pay Web site
- View and print ARTS form
- OAs - peer advising
- KU Info / Peer & Tier library assistants
- ACS Help Desk
- FSAC front desk
- Financial aid officer
- Librarian - subject specialist

The first level is **auto-transaction** – services that are institutionally embedded in the academic cycle – and are sent automatically and electronically (e.g. email notifying students of enrollment times)

The second level is **self-help**, which is an action initiated by the individual at the time of need (e.g. online tutorials, help screens)

Recommended Action Steps

1. Create a new group that would form the first generation of an ongoing/rotating collaborative team of help desk advisors.
   - A joint team of representatives from multiple areas that can continue the collaboration started by the work of the Student Success Help Desk Priority Work Group and the HVC2 Help Desk Group is vital to the success of this effort.
   - Joint leadership between Information Services and Student Success is recommended.

2. A second priority is to develop the branding identity (PR, visual symbols, marketing) through a unifying theme/name/logo. Some suggested concept names include: The Big Giant Help Desk; Hawk Help; KU One Stop; “I”(information symbol), i-find, etc.

3. Identify and include all relevant constituents and service providers; coordinate with Information Services technology experts, KU libraries, existing help desks such as KU Info, ResNet, NTS, ACS, Student Success units, Bursar, PeopleSoft, HR, etc.

4. Review and adopt KU practices that are already in place and working well. Integrate methods used by ACS, NTS, and ResNet, such as the “problem ticket” method of tracking and use of Remedy software (which provides a way to track and access frequently asked questions) as well as KU Info database; also consider KU Info student training model and library peer and tier student hourly models; recognize the potential uses for the Kyou Portal, online tutorial software, Hawk Help chat software, Admissions chat features, etc.

5. Explore successful models in use; consult with University of Minnesota One-Stop, which is a nationally recognized model; develop a model specifically for KU that is based on best practices and designs in use at peer institutions.

6. Determine a budget and secure funds for ongoing support, technology upgrades, and marketing; compensate staff as re-assigned time or adjunct generalist; explore ways to reward service; explore ways to utilize Tuition Enhancement funds; embed the model at an administrative level that is comprehensive and allows for shared leadership and clear institutional support (in other words, at VP SS and/or VP IS level).

7. Consider that this effort may require at least one full-time staff member or, at the very least, shared or joint staffing between or among key offices. At the same time, develop a front-line staffing model that utilizes peer assistants previously trained by other programs, such as NSO and peer and tier library/KU Info, FSAC, ResNet, ASC help desk students.

8. Outline a model of service levels; clearly describe roles and functions for specialists, generalists, peers, self-help, and auto-transactions (see attached diagram).
9. Develop a training curriculum that both reinforces roles and goals and outlines boundaries for particular roles; focus on referral skills and collaboration/communication skills; related and continuous staff education should be available to the whole KU community.

10. As much as possible, interface with other priority groups, especially the Student Success work groups on communication and retention and the HVC2 quality service groups. Coordinate with UR campus image group on web look and information sharing.

11. Develop quality service components based on best practices in customer service, which includes a high level of responsiveness in terms of access, time, and security; coordinate with the communications work group to develop multiple methods of communication and to provide a “code blue” network of contact and information sharing during emergency situations such as computer hackings and virus/worm alerts, health and weather emergencies, etc. Adopt a status network with web page and listserv for essential services and staff.

12. Determine physical locations of help desk(s), walk-up windows, kiosks, etc. Assess need for a central office; assess value of dispersed model using satellite offices and a collaborative team leadership structure.

13. Develop ongoing assessment tools; collect data via Kyou Portal Survey Channel; value student feedback as the driver for change; disseminate findings to larger university community.
Multiple offices and services coordinate to create a universal help desk concept
Appendix

Case Study: i-enroll demonstration project

Early in our work group process we discussed how many of us from different areas of the campus, including Student Success offices, seem to be answering the same questions for students during the various cycles of the year. Online enrollment (Enroll and Pay) was going into its third semester and our group identified some of the common questions and challenges associated with learning and using the program. To test some of our emerging ideas on how to coordinate many diverse offices, we decided to pilot a small Enroll and Pay “help desk” project from April 5 to April 23, called i-enroll. At the same time, members of the HVC2 committee agreed to assist in developing a network of support for the project. We combined membership on several initiatives and both Information Services and Student Success contributed in both staffing and resources; we were able to purchase t-shirts, pay student hourly peer coaches, and host a pizza party for project participants.

We outlined the ways we wanted to enhance existing support for students using Enroll and Pay while implementing several ideas associated with a universal help desk model.

Buy-in from people who will be most affected

We met and discussed our ideas with the administrators of the Enroll and Pay system, the University Registrar and the Enrollment Center. We were very clear that we wanted to build on services that were already being provided and supplement services with some of the components identified with a help desk. We hoped that this type of collaboration would be significantly helpful for student users, lead to future collaboration, and strengthen communication among offices, especially during specific peak times of the year.

First, we created access to a variety of service points. A web page (www.writing.ku.edu/enroll) outlining different ways to get help with Enroll and Pay included up to date information:

a. Walk in hours at the Enrollment Center and in a computer lab in Anschutz Library (Lawrence Campus only) with peer assistants
b. Phone assistance (distribution call center)
c. Online tutorial
d. Enroll and Pay navigational worksheet
e. FAQ
f. Phone numbers and addresses for the Edwards Campus and KU Med Center help desk representatives
g. And the ability to email the page to a friend

An additional web site (www.ienroll.nts.ku.edu) was developed for the staff/students involved in the i-enroll project. This site allowed users to change and update information, schedule work hours, communicate network outages, etc.

Organization of supportive services

Phone

Phone assistance was structured (set up by NTS) as a call distribution center with shifts involving four units -- the Enrollment Center, KU Info, and the Computer Center’s Help Desk. Phone assistance hours: Monday – Wednesday, 8 am-11 pm, Thursday, 8 am –10 pm, Friday, 8 am –6 pm, Saturday, 8 am-5 pm, Sunday, 4 pm-10 pm. If students could not answer questions then they
were to defer to the Enrollment Center. Over 690 calls were placed to the call distribution center. The average number of calls for E&P was 40 phone calls a day, with the highest being 112 calls on April 6.

**Online Tutorial**
We created a tutorial that would walk a student through the enrollment process as well as explain possible problems they might encounter such as holds, permission numbers, and class conflicts. We worked closely with the Enroll and Pay system administrator, members of the Enrollment Center staff and students to make sure the tutorial was understandable and accessible. As of April 25th the online tutorial had almost 1,000 individual hits.

**i-enroll Webpage**
We created a webpage that would bring all of the resources together. There was a link from the KU home page to i-enroll. i-enroll was also the featured KU homepage web link for the first week of enrollment. In addition, we created a graphic button and the main KU page hosted the button for the duration of the project. By close of the project, the web site received over 13,000 hits.

**Peer Assistants**
We decided that it would be easiest and quickest to work with trained students already working in areas of Student Success (i.e. Freshman-Sophomore Advising Center, Enrollment Center, New Student Orientation) and Information Services, (i.e. KU Info, ResNet, the Computer Center’s Help Desk). We had two training sessions, and set up a password protected bulletin board and online schedule. The student hourly funds for the peer assistants came from two areas, Information Services and Student Success. These students were paid to work shifts during a three-week period: April 5-8, April 11-15, and April 18-22.

**Walk-in Hours in the Enrollment Center/Anschutz Library Instruction Center**
Peer assistants worked at the Enrollment Center (1 student in addition to the regular staff) during the day and in Anschutz Instruction Center (4 students) in the evening from 7-9 pm. KU Info functioned simultaneously with the additional service. It is our impression that most students enroll from remote locations (home computers) and we had very few people going to the Anschutz Instruction Center specifically for enrollment assistance. One area to explore in the future is if peer coaches would be useful in other computer lab locations or if assistance should be focused in the areas of phone and online help rather than face-to-face assistance.

**Information Packets**
We created packets with information from the Enrollment Center, Financial Aid, a copy of the online tutorial, and a contact list. The i-enroll packets were distributed to over 40 professional staff at service points where they might get Enroll and Pay questions from students (i.e. reference desks in libraries, Student Success offices).

**Data Collection & Assessments**
- Participant feedback
- NTS web page forum=over 50 login members checking internal status pages
- Data from calls (NTS-ACD)=over 300 calls to hotline number
- Hits on web site=over 13,000
- i-enroll help desk logs=reviewed for nature of help offered
- Online tutorial=1,000 hits
Although we had planned to conduct a student survey through the Kyou Portal (unfortunately, the survey channel is not yet ready to use), we did learn from the recent student elections what students see as key issues. The student senate coalition platform included the following issues related to a help desk concept:

- Students requested online voting in student senate elections from any web-accessible computer
- Students proposed an online marketplace, a site for students to post free classified ads, possibly part of the Kyou Portal.
- Students requested online enrollment improvements, including more easily accessible course catalog and timeline online

Information from the ACS Help Desk (Sue Silkey) did not distinguish the regular hotline phone number calls and the temporary hotline number calls: Enroll and Pay calls to the Help desk from 4/5 to 04/23: 267 general assistance calls and 53 login problems, but all related to Enroll & Pay in some form.

Perhaps because of the fast ramp up to this project, we failed to provide each office with a more structured data collection tool. Even though all offices were asked to keep a log (we had log sheets printed and distributed) on calls and the nature of walk-in questions, we received little data following the close of the project. The several follow up emails asking for written feedback did not pull in enough feedback to do a full assessment. Recommendations for next steps include developing a more structured data collection tool and ask offices/representatives to be accountable for providing this information as a matter of course.

Compared with the first two semesters of online enrollment, the call volume was lower. Several key people suspect this is due to more student experience and training with the system. Sue Silkey, who operates the ACS Help Desk (4-0200), had this to say about call volume during the recent Enroll & Pay period:

“The feeling is that the number of calls was much lower. For the spring enrollment period 10/31-1/31 92 days (includes enrollment period and fee payments), we logged 1151 Enroll and Pay calls for assistance. So far this enroll and pay period 04/01/04 to May 12, 2004 (42 days of enrollment only), we have logged 327 calls.”