2002

Models of integrated student services

Roland A. Carrillo

University of Northern Iowa

Copyright ©2002 Roland A. Carrillo

Follow this and additional works at: https://scholarworks.uni.edu/grp

Part of the Higher Education Administration Commons

Let us know how access to this document benefits you

Recommended Citation

https://scholarworks.uni.edu/grp/488

This Open Access Graduate Research Paper is brought to you for free and open access by the Graduate College at UNI ScholarWorks. It has been accepted for inclusion in Graduate Research Papers by an authorized administrator of UNI ScholarWorks. For more information, please contact scholarworks@uni.edu.
Models of integrated student services

Abstract
In the past ten years, some colleges and universities have rethought the types of services they offer to their students and the manner in which the services are delivered. This innovation in student services involves rethinking and organizing common processes, matching personnel and technology to accomplish these processes, and modifications in physical facilities to better accommodate the new system. Together, these innovations often create a "one-stop shop" that delivers a multitude of common student services in a quick and efficient manner. This reorganization is known as integrated student services (Beede & Burnett, 1999).
MODELS OF INTEGRATED STUDENT SERVICES

A Research Paper

Presented to

The Department of Educational Leadership, Counseling, and Postsecondary Education

University of Northern Iowa

In Partial Fulfillment of the Requirements for the Degree

Master of Arts in Education

by

Roland A. Carrillo

December 2002
This Research Paper by: Roland A. Carrillo

Entitled: Models of Integrated Student Services

has been approved as meeting the research paper requirement for the

Degree Master of Arts in Education.

Carolyn R. Bair
Dr. Carolyn Bair / Director of Research Paper

C. Renée Romano
Dr. Renee Romano / Second Reader of Research Paper

Michael D. Waggoner
Head, Department of Educational Leadership, Counseling, and Postsecondary Education
MODELS OF INTEGRATED STUDENT SERVICES

Roland A. Carrillo

University of Northern Iowa Postsecondary Education: Student Affairs

December 2002
Introduction

Imagine the following situation. A student with financial need goes to a registration or scheduling department to complete paperwork or electronic forms to officially enroll in classes. Before the student attempts to add the first course, s/he must meet with a financial aid representative to secure funding, followed by the bursars office to make payment for current courses. At this office, the student is reminded of satisfactory progress toward a degree and is referred to a records office or advising office to go over transcript information. Here, university officials are likely to ask what area of study the student would like to pursue. From this office, the student may trek over to a career services office to explore what the job market looks like for people with certain majors. So, for the original goal of registration, the student may have visited more than two other offices on campus. This may not be burdensome at a small liberal arts college, but if the university enrolled more than 10,000 students, this registration adventure could encompass hours if not days to reach all the offices, especially if they are not within comfortable walking distance of each other and if the student needed to call or visit for the appointments in each department.

In the past ten years, some colleges and universities have rethought the types of services they offer to their students and the manner in which the services are delivered. This innovation in student services involves rethinking and organizing common processes, matching personnel and technology to accomplish these processes, and modifications in physical facilities to better accommodate the new system. Together, these innovations often create a "one-stop shop" that delivers a multitude of common
Identifying & Redesigning Processes

One of the first steps in the restructuring of college and university student services is to identify the critical processes that are needed in order to enroll, advise, retain, and ultimately graduate students. Colleges and universities that engage in the process of redesigning their college and university student services typically form teams comprised of many departmental and office members, aided by an outside consultant or group to look at these processes.

The University of Delaware was one of the first universities to redesign student services in a manner resembling a “one-stop shop” environment. A project team at the University of Delaware, chaired by the registrar and comprised of heads of admissions, financial aid, billing, management information systems and institutional research and planning, met to evaluate the functions of student services offices. They concluded that students seemed to serve the system more than the system served the students. The project team specifically found that employees were not trained well enough to understand how their role in one office would relate to the roles of employees in another office or to the university as a whole and that the computing systems were outdated and inadequate for integrating services (Hollowell, 1999).

The team analyzed the types and frequency of many student concerns at each office and created self-help guides and a generalist counter staff who could answer a variety of questions. Specialists in each area would be located near generalists to answer more in-depth questions. The university also invested in a new student information
Integrated Student Services

system that made information more accessible. A central campus building became available in the summer of 1991 and the University of Delaware started to put their integrated student services plan into action the following year (Hollowell, 1999).

At Seton Hall University, an Enrollment Services Redesign Team (ESRT) was created, comprised of a consultant and assistant directors in four separate university offices working with admitting students, financial aid, enrollment, and billing. The group was particularly effective because the employees at the assistant director level were close enough to daily activities and work processes, but did not have ultimate responsibility for the organizational functioning and would not feel as threatened as a single director might by ideas generated from criticisms (Kleinman, 1999).

The ESRT met weekly and conducted focus groups with staff and students to identify their paper-intensive forms, underutilized technology, lack of communication and information-sharing between offices, and low levels of “customer service.” The team engaged in process mapping, a graphic depiction of the flow of processes to show how papers, students, signatures, and approvals weaved through the university system. The team started from the perspective of their students, whom they describe as customers, and after understanding the processes experienced by them, they developed more highly enabled technology for applications and forms, and created a new physical environment where students could complete a number of transactions in a quick and convenient manner (Kleinman, 1999).

Babson College in Massachusetts formed a Reengineering Design Team to automate more processes while reducing operating costs by 30 to 40 percent. This team met with current and prospective students, their parents, full and part-time graduate
students, faculty members, and corporate recruiters to learn what was working and what was not working in their system (Lewis, 1999).

The Babson College team found opportunities for change in areas of academic records/registration, career services, admissions, and financial services. For example, they had two admissions offices that served different students, one for undergraduate students and another for graduate students, but had common processes in data entry and correspondence via telephone and mail. These were consolidated into one. There were also two registrar’s offices where up to 85 percent of work was repeated in both places. These were also combined. The College also combined campus internship offices with the Office of Career Services into a comprehensive Center for Career Development, and they merged processes of student billing, loan processing, and financial aid into a more comprehensive Student Financial Services (Lewis, 1999).

At Boston College, Project Delta was created to change the college’s management and culture. As a part of Project Delta, an Executive Team consisting of seven Boston College employees and an outside consultant drafted a direction statement that led to redesigning their student services model. From this, several other teams were formed consisting of members from areas including housing, enrollment, student accounts, financial aid, counseling, and admissions. Team members were at the director level of administration in their respective areas (Campanella & Owens, 1999).

The team at Boston College proposed having one comprehensive student information system to manage information related to admissions, finances, advising, career information, and records, instead of having many systems with limited or specific information. The team also wanted students to have access to this kind of information,
like viewing a financial aid package, changing a course schedule, creating a degree plan, and viewing grades. Paper forms were converted into online forms to further reduce going to different offices on campus for corresponding forms and to reduce file maintenance. The team also worked with the college’s Human Resources department to help explain to staff members why these changes in processes were made and how staff could adjust accordingly (Campanella & Owens, 1999).

In 1995, Carnegie Mellon University formed an Enrollment Process Reengineering Team (EPRT) led by the associate vice president for planning and budget and consisting of members from the following areas: housing, registrar, enrollment systems, computer engineering, cashier, and undergraduate education. They collected institutional data in areas like financial aid awarding, registration transactions, and billing and payment cycles to more fully understand the enrollment process experienced by students (Anderson & Elliot, 1999).

The result of the Carnegie Mellon team’s meetings was an Enrollment Services Process Implementation Team that opened a one-stop student services center called The HUB. The HUB eliminated separate offices and emphasized cooperating with each other by combining enrollment aspects into one location that proved more convenient for students. Solving problems was no longer done by separate departments, instead, a reorganization by functions such as finances, information systems, records, and student support within The HUB resulted in work teams of Enrollment Services Counselors (Anderson, 2002).
Staffing & Organization

Once student service processes have been identified and likely modified, the next logical question is “Who will perform these duties?” To some extent, technology will enable students to perform transactions for themselves after they are given access to their own university information. Technology will be addressed in the next section, but the people who maintain and use the technology will be the focus of this section.

Johnson County Community College (JCCC) in Kansas envisioned a three-tiered model in which employees are cross-trained in multiple student services areas and are students’ first contact for help. If the student concern is out of the “front line” employee’s knowledge base, a referral to a departmental generalist (student, secretary, or administrative assistant) is made. If the student’s concerns still need further attention, the student is referred to a departmental specialist (e.g. financial aid counselor) (Day & Pitts, 2002).

To increase efficiency, JCCC decided on a two-tiered model of cross-trained generalists and departmental specialists in their Student Success Center, eliminating the departmental generalist. Then, the departmental generalists were cross-trained, resulting in Resource Assistants who were knowledgeable in multiple areas like admissions, financial aid, academic and career planning, student activities, records, and web services. Training Resource Assistants at JCCC is similar to training generalists at other institutions. Small groups of new employees meet with veteran staff members from the various areas and discuss specific topics, journal hypothetical situations they may encounter while meeting with students, and shadow the veterans in actual situations.
Gradually, new employees present to new students, then work over phones and then in person with students (Day & Pitts, 2002).

At the University of Central Oklahoma, there is a model in place that is similar to JCCC’s model. A Service Representative is a non-professional level position that is similar to a generalist, but the title is used to get away from the term “clerk” and to promote general knowledge of areas, not specialties. There are also Processing Assistants who help with Service Representatives at busy times, but whose main tasks are often “behind the scenes,” doing mostly mail and phone work. These two positions are at the same level, but encompass different focuses on tasks and processes (J. Legere, personal communication, June 12, 2001).

At Seton Hall, a team approach was used for their Enrollment Services. Three teams of cross-trained Student Enrollment Advisors (SEAs) report to one organizational executive director in an organizational hierarchy that became more horizontal compared to the previous plan, which was more vertical. Each team would have one specialist for admissions, one for records, one for finances, an information technology specialist, four generalists, and a head SEA leader. In this model, each specialist is the expert in their particular area (e.g. finances or records) and is responsible for training their team members so each team can address many of the student concerns about which they are asked (Kleinman, 1999).

In the last year, Seton Hall has further modified their enrollment services positions by creating a Customer Response Team and Enrollment Services Representatives. Both positions’ duties are the same, as each employee must have a working knowledge of admissions, financial aid, registrar, and bursar, but members of the
Customer Response Team work primarily at an office "front" or counter, while
Enrollment Services reps handle more "back" office work by answering phone calls and
mail processes. Both groups can also shift in their physical areas to assist each other
during busy periods (Green, Jefferis, & Kleinman, 2002).

Carnegie Mellon University employs nine enrollment services counselors who
provide answers to the majority of student concerns in the university HUB. They can
handle transactions like receiving payments for student accounts, and are also able to
provide information to students and parents about more in-depth topics like short and
long term options for financing (J. R. Papinchak, personal communication, June 25,
2001).

In addition to the enrollment services counselors are program administrators at
Carnegie Mellon. These positions are equivalent to associate directors in a traditional
college student services model, as they work more with university administration issues
relevant to their area. There are three program administrators for financial aid, four for
student accounts, and one each for scheduling, communications, and records (Anderson,
2002).

Technology

The role of technology in Integrated Student Services is that of an enabling or
facilitating agent. That is, technology is not used for the sake of technology; rather, it is
used to more efficiently process, view, share, and update information used by students
and those who work directly with students in the college and university community.
Technology aids in the development and functioning of a one-stop student services center
that allows for information viewing and transactions of financial, academic, and other personal records (Beede, 1999).

Traditional student services models were estimated to have 10% of this information handled by students themselves, 20% done by a secretary, clerk, assistant, or generalist, and 70% addressed by a specialist. Integrated Student Services models reverse this workload through technology so that 70% of information is automated and managed by students, 20% by generalists, and the remaining 10% by specialists. Technology in these new models is used for more cohesive and easily navigated websites, student data and record sharing through information systems, advanced calendaring tools, online advising, and student portfolios and portals (Burnett, 2002).

Darlene Burnett, an IBM consultant for Best Practices in Education, distinguishes the evolution of four generations of web services. Generation 1 is described as an online representation of the physical divisions of a college or university in which each department or office maintains its own content information from the university perspective with little or no integration to other areas. Generation 2 Web sites are made to speak to a particular user (e.g. faculty member, alumni, visitor), but content is still in organizational (college or university) terminology. Generation 3 involves the customization of a portal from the perspective of a user and her/his interests and allows for online transactions. In Generation 4, high-tech is combined with high touch to explain how to do what is needed; it is more personalized to the user, and advising and corresponding are possible in “real-time” (Burnett, 2002). The following examples show some innovations in Generations 3 & 4, which are becoming common in more recent integrated student services models.
The University of California Regents teamed with university vice chancellors to create a pre-university online system called UC Gateways. UC Gateways is designed for middle and high school students to keep track of their academic progress toward college and for university officials to assess and advise prospective university students. The portfolio design was used for this system, which helps prospective college students track their coursework, jobs, interests, activities, and personality and career inventories before they even step foot on campus (Thompson, Heisel, & Caras, 2002).

A similar portfolio is in place for current students at Kent State University. At Kent, the Career Collage was designed to tie together aspects of students’ interests and ambitions with their current college experiences. The Collage combines sections on self-awareness, career exploration, experience, and a miscellaneous “junk drawer” for recording and reflecting upon experiences and goals (Rickard, Motayar, Stieber, Owens, & Craig, 2002).

A portal for students called “One Stop” has been created at the University of Minnesota. One-Stop is not a list of student services at the university, nor does it just link a student concern to the appropriate office home web page. Rather, it is a customizable “ticket to the world of information and services” (shown on the portal) for the university community. It lists the actual processes and issues students recognize and face, like registration, grades, and scholarship resources, organized in a way that ties them together by student concern and not university department. It allows for online transactions like changing a major, requesting a degree audit, and viewing financial information (Koskan, 2002).
Tufts University uses the portfolio not only as a service for students, but also as an aide for staff. Class deans, academic advisors, financial aid representatives, or other individuals are able to track interactions with students and staff and share this information with one another. With this, university representatives are able to view past comments and transactions a student has made with other personnel in preparation for a meeting, to better understand or explain what has already taken place, and to make recommendations or assist with current or future concerns or issues (Dillon, 2002).

Aspects of the portfolio are combined with the portal at Brigham Young University (BYU). The portal is organized so that student areas such as academic, financial, and career planning are linked with actual student experiences like leadership activities, awards and employment, and internships. There is also an online personal introduction to an advisor, to whom a student can submit a request for an appointment over the Internet (Kramer & Peterson, 1999).

The Western Cooperative for Educational Communications (WCET) takes web services a step further. As part of a three-year Learning Anytime Anywhere Partnership (LAAP) project involving four colleges and universities, a Webcast Series provides free online assistance to distance learners from student services experts. The project’s main focus is to provide online services for online learners (Western Cooperative for Educational Communications, 2002).

This technological expansion from providing information of services (Generation 1) to customizable portals and online advising (Generation 4) may eventually lead to a no-stop physical services center. The University of Delaware, the pioneer
university in integrating student services, has a vice-president who is currently analyzing this possibility (Potter, 2002).

Facilities & Physical Space

While a no-stop services center is being discussed with advances and more prevalent use of technology, most integrated student services models utilize buildings and other physical facilities in a number of ways. With a reorganization of functions and processes comes the logical question of where services will be provided when multiple offices and people are teamed together.

James Madison University (JMU) has three buildings in their Student Success Service Center. One building is a two-story welcome center that is located on the outskirts of campus and directly off the interstate. University information, meetings, appointments, and tours are coordinated at a large information desk on the main level, while admissions processes, phone calls, and interviews are conducted on the lower level (R. Mitchell, personal communication, June 18, 2001).

A second building at James Madison University is a five-story service center with different functions on each floor. The first contains an information desk for university and building information. Another contains counters for two to five student and staff representatives from each of the offices of Financial Aid, Registration, and Bursar. Another level houses offices for these services, and the top floor contains a large lounge for students and staff, as well as computer kiosks for scheduling and viewing personal information (R. Mitchell, personal communication, June 18, 2001).

James Madison University’s third building is a learning center that combines academic and career advising. This integration supports JMU’s goal of student
A three-story building was constructed at the University of Nevada at Reno that is similar to JMU’s services center. The building was designed to resemble a pyramid, that is, offices, functions, and processes that were most commonly used were located in the bottom floors, and upper levels would be for issues that became more specialized and unique. A computer lab, university security and parking, and a food service area are on the main floor, admissions and records on the second, and financial services on the third. Each office maintains its own identity and title, but is physically located in the same building (S. Guidry, personal communication, June 15, 2001).

The University of Alabama in Tuscaloosa embarked on a four-phase renovation to campus service buildings over a five-year period. The last phase involved the construction of a 60,000-square-foot student services building that includes the offices of admissions, financial aid, records, bursar, parking, as well as other administrative functions. This building is conveniently located next to a new 500 space parking deck, connected by a pedestrian bridge (Sepsas, 2000).

A three-story, 87,200-square-foot student center was constructed at Johnson County Community College that also serves as a “front door” to the campus. The first floor is an open and welcoming area where generalists staff an information desk and offer assistance. A bookstore, food court, and dining area are also located on the first floor. The second floor is the Student Success Center. Designed to achieve a living room atmosphere, the center is staffed by generalists to provide service for almost all student.
concerns. The third floor of the center is used as a private area for staff processing paperwork in areas of admissions, financial aid, records, and testing (Sepsas, 2000).

The University of Richmond also utilized an open space arrangement with its merging Offices of Financial Aid, Registrar, and Bursar. While each office continues to work with specific processes, students indicate that they like the convenience of going to one building to complete transactions in these areas. Privacy was the major concern as information shared in these areas may be quite personal. The university responded by custom building cubicles resembling a hospital admission area. This allowed students more privacy for sharing their information, and also provided staff privacy, as visitors could not see what may be on a work desk (Sauer & Peterson, 2001).

The student services building at the University of Delaware was designed to resemble a branch bank model. A lobby area provides informational brochures and forms and teller windows staffed by generalists who handle student transactions for offices of registrar, financial aid, dining, ID, and billing (Hollowell, 1999).

Conclusion

The "physical" component of student services seems to have been a significant factor when institutions began rethinking the way student services are administered. Students would go to an office that looked familiar to them and would see if their question or concern could be answered there. If not, students were likely referred to another office, which could result in walking next door, or trekking across a sprawling campus. Often, various paper approvals and forms would need to be completed by multiple people, then approved and entered by others. This traditional model seems to have the students serving the system instead of having a system that serves the students.
A student services division that is physically located in the same area is a start to a more user (student) friendly environment, but if one looks at student services from a process perspective instead of an office perspective, then more integration can take place. Reorganizing work by streamlining processes, assigning and training cross-functional staff, and utilizing technology are the main ingredients for most current models, but it also seems like this movement emphasizes transactional processes and de-emphasizes transformational processes.

It is efficient for a university to have staff available to assist students handle quick transactions like securing an educational loan, starting a student organization, or changing classes, but isn’t the staff also there to help explain what these actions may mean to students? For example, staff would explain how taking out an additional loan would increase monthly repayment amounts, or would brainstorm with students about what they would like their student group to do in the community, or possibly mentioning a minor that could be added to a student’s degree by taking one additional class. The transactions are necessary, but it may be wrong to assume that the students already know exactly what they are doing and that they just need for student services staff to authorize it.

As integrated student services models rely increasingly more on technology, it will be significant to monitor how much of the services provided are transactional in nature and can be handled efficiently. It will be crucial to ensure that more complex student concerns are not always addressed by a form or website, but may call for more time and energy from a professional staff member to contribute to student success.
Integrated Student Services

References


Burnett, D. J. (2002). Innovations in student services: Best practices and process innovation models and trends. In D. J. Burnett & D. G. Oblinger (Eds.), *Innovation in student services: Planning for models blending high touch / high tech* (pp.3-14). Ann Arbor, MI: Society for College and University Planning.

Burnett, D., & Pantel, C. (1999). From in-line to online: Transforming student services. In M. Beede & D. Burnett (Eds.), *Planning for student services: Best practices for the 21st century* (pp. 73-78). Ann Arbor, MI: Society for College and University Planning.


