

# Guidelines for Creating Student Services Online

## Cross-Phase Issues

The following issues may be valuable to consider throughout the student service re-engineering process.

### Project Management

The previous section on [phases](#) provided information about the sequence of activities in this LAAP project. Project management skills can help you in every phase.

When you think about, almost any undertaking could be considered a project: going to the grocery store, taking a trip, or running a household. Making the transition to student services online is a big project. Every project has a beginning, middle and end and requires a plan, time and resources. Projects can benefit from a general knowledge and application of these project management concepts:

- **Leadership**  
Leadership provides organization, clarity, delegation, motivation, accountability, support and rewards. How you achieve these outcomes is idiosyncratic, but are essential in being successful.
- **Project plan**  
Identify the scope, timeline, budget, and deliverables for the project through a project plan. Use a project management tool, such as Microsoft Project, to keep the work on track. Identify the tasks, persons responsible, date due, funding required, and special circumstances. Provide status reports on a regular basis and make them accessible to the project team. Acknowledge and capitalize on your institution's culture to be able to accomplish tasks and access resources.
- **Team building**  
Identify the people who will help you get the job done. Your team should include stakeholders, thinkers, doers, and beneficiaries. Get them on your team by asking, cajoling, trading, or going to their supervisor. Build an esprit d'corps among the team members and celebrate the achievement of milestones.
- **Communication**  
Communicate widely, often, and in a sustained manner with team members. Consider using websites, videotapes of meetings and PowerPoint presentations to supplement in person and on paper communications. It may be helpful to use a LCD screen connected to a laptop during meetings to show the issues addressed and agreements made — and then distribute those notes to the entire team.

- **Risk management**  
Anticipate (or at least try to) problems that may arise in the project and make plans on how to deal with them. Changes in technology, technology companies, budgets, management and team membership are possible/likely, so acknowledging the possibility up front is useful.

There are many sources of information about project management, including the [Project Management Institute](#), [4pm.com](#), and [projectmanagment.com](#).

## Organizational Change

Expect that a project as significant as transforming student services will have an impact on your institution. Our LAAP project evaluator will provide [case studies](#) that describe the change at the partners' institutions.

Key issues that emerged were:

- Impact on students
- Impact on personnel during and after implementation
- Reallocation of financial costs

## Technology

Although the LAAP partners emphasize that moving student services to the online environment was more a people/politics endeavor than a technical one, it is important to consider how technology is used.

- **Silos**  
Many higher education websites began as virtual replicas of the physical campus; services were as separate as buildings. See the [overview](#) for more information on silos and web generations. The technology that perpetuates silos — proprietary databases and platform specific software — severely hampers the creation of seamless, user-oriented systems. Sharing data and interfaces is key to dismantling silos.
- **Homegrown or purchased solutions**  
Who created your institution's student information system and course management system? A vendor — such as PeopleSoft, Datatel, SCT, WebCT or Blackboard — or the in-house Information Technology staff? Online student services can be created in both types of systems, by stretching a system's functionality or repurposing its format for other uses.
  - Regis University worked with a Datatel consultant to write new code to expand the core administrative functions to allow new communication functions.
  - Kansas State University used its homegrown K-State Online course management system as the basic interface for its online academic advising system and added database query functionality.
- **Student technology skills and expectations**  
While many students will use their trained and intuitive computer skills to

immediately master the most complex whiz-bang system, other students are still in the "What do you mean by 'click'?" stage. So, how do you avoid frustrating experiences for students — whom you want to attract and retain — across the tech-savvy continuum? By designing **web experiences** with the greatest personalized and customized functionality plus just-in-time assistance such as help desks, FAQs, online tutorials or peer mentors. Technology is just part of the solution! Plan, organize, design and test how the technology will be used.

- **Staff technology skills and expectations**  
Using technology will change student services staff responsibilities, most likely for the better. For more information on [student services staff and technology](#), see an article in the Resources section. Many students prefer self-service for meeting basic information and transactional needs, thus freeing staff from those rote tasks. Staff will be able to access the necessary information to offer comprehensive help to students. The prospect of change can provoke anxiety, but change can also lead to a higher level of professional activity:
  - When Brigham Young University's financial aid office went online and paperless, the office staff trained to become certified financial planners. They increased their ability to offer students a full range of financial planning assistance.
  - Because orientation information will soon be online, advisors at Kapi'olani Community College anticipate spending less time making repetitive orientation presentations and more time with individual students developing a degree plan.
- **Accessibility**  
Accessibility means that your web-based services can be used by people with disabilities. Once again, your design for using technology is the key, not just having it. For more [information on accessibility](#), see an article in the Resources section.
- **Vendor products and services selection**  
Upon review of your institution's strategic initiatives, financial and human resources and other restrictions, your project team may decide to purchase vendor products or services.

## Research

- **Your own institution**  
Research initiatives in your institution that may be both integral and tangential to your project. Recognize that this internal research may be more difficult and/or time consuming. It is important to devote adequate effort to this task to ensure the greatest success of your project. Concurrent with the LAAP projects:
  - Both Kapi'olani Community College and K-State were looking for new student information systems. KCC, as part of the University of Hawaii system, did not have control over the SIS search and purchase effort, but was rocked nonetheless when the selected vendor soon went out of business.

- Regis had an existing committee considering the creation of a portal. The LAAP team decided to pursue a web solution involving the Datatel administrative system instead of a portal.
- SCT used the [build/buy/partner matrix](#) when deciding how to bring new products to market.
  - SCT chose to build a middleware technology to transfer data between its Banner/Plus student information system and the WebCT platform.
  - It bought Campus Pipeline to enhance its ability to provide integration infrastructure, customized portals and enterprise applications.
  - It partnered with Nuventive to offer a digital portfolio product.
- **Other institutions**  
 Research best practices in online student services at other institutions. This information will be very helpful to your team and executive leadership in understanding new possibilities and prospective expectations from students in an increasingly competitive environment. See the many institutions identified in the [Resources](#) sections.

## Policies and Practices

As your institution engages in the process of enhancing student services, it is probable that some current policies and practices will appear problematic. Or it may become clear that new policies and practices are needed. Once again, acknowledge and capitalize on your institution's culture and processes to achieve the necessary changes.

The LAAP partners dealt with various policies and practices:

- An audit of databases with student information at K-State found that there were 17 of them. They used different software and were not connected. The K-State LAAP team, creating an online academic advising system, needed access to those 17 databases but encountered some resistance from the "fiefdoms" that created and controlled the databases. The issue of database control and access was elevated to the appropriate decision-makers. Result: the Office of the Registrar gained authority over all the databases and the IS department created a read-only interface that pulls the data while keeping the databases in their original locations. Next big policy issue at K-State: writing to the databases by users outside the "fiefdoms."
- Kapi'olani decided to create a physical one-stop shop for many student services along the 70/20/10 model (70% self-service, 20% generalist service and 10% specialist service). A review of the State of Hawaii personnel job descriptions by the Dean of Student found that there was no job description for a one-stop shop generalist. So the Dean searched for a remedy and found a state pilot program to join to test the generalist position description.
- The new communications functionality at Regis, which includes push technology, got members of the LAAP team thinking about the need for communication management. With targeted and broadcast email so easy

now, will applicants and students be overwhelmed by email from Regis? Should every student be required to have a Regis email account? Should an office be responsible for managing the flow of communication?

## **Collaboration**

Your institution may choose to collaborate with another institution, a system or consortium, or a corporation. For a collaboration to succeed, there must be a compelling reason(s) for the institutions to work together.

### **Collaboration among campuses**

- In designing new online and integrated student services, collaboration begins within the campus.
- Collaborative projects take more time.
- Not all campuses can move through a joint project timeline at the same speed.

### **Collaboration with a corporate partner**

- 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.
- Some campuses are more suspicious than others of corporate partners with regard to intellectual property.
- Partner institutions are less likely to be involved in efforts that require Non Disclosure Agreements with corporate partners.