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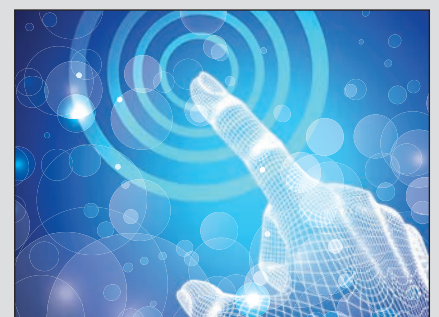
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COLLEGE OF THE DESERT

WINTER 2014 Models of Efficiency

Last but not least: *UB* presents the
final program honorees

Models of
Efficiency

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PORTLAND STATE UNIVERSITY



MARIST COLLEGE

Five years of campus efficiency success

We couldn't help but notice, more than five years ago, that struggles on college and university campuses to keep up with the core mission of serving students throughout the Great Recession and beyond was leading to a new, positive era within higher education. Greater operational efficiencies was the call, and innovative solutions and programs that saved resources while actually boosting student service were the actions. It seemed we were constantly receiving emails and calls from proud readers who wanted to share their efficiency successes with others.

So, in 2010, *University Business* launched the Models of Efficiency program. Sponsored by Higher One, the program was our way of honoring the success stories that in nearly all cases were discovered when administrators set to work on the task of saving time and money. Many of the departments honored in the program involved automation in administrative process made possible through new technology and creative uses of existing technology. Campus leaders took a hard look at where they could preserve resources, and at so many institutions students or other internal constituents (such as faculty) found their interactions with various campus departments were less likely to be frustrating and more likely to be satisfying.

As we shared your stories, the momentum for efficiency greatness grew. We've been in awe of the innovations that continue to be made in campus administrative operations—

sometimes within the same department a few years after first being named a Model of Efficiency.

We've also noticed how the efficiency stories have evolved and in many cases involve partnerships between multiple departments internally as well as with other external entities. This month, for example, we're honoring one institution that has made it easier for students and families to interact with the school on the various types of financial services by offering a single point of contact for financial aid, bill payments and other related inquiries. And another institution formed a printing-resources consortium with other area colleges to save money and provide more consistent service.

The stories are big, and the student focus has grown even more prominent. This reality sparked a new idea.

The Models of Efficiency program comes to a close this month, after 15 rounds and 143 departments receiving the award. We thank you for your participation, and anyone can continue to access the success stories via www.universitybusiness.com/moe.

But our era of recognizing institutional success is far from over. We hope you'll join us in celebrating the many ways colleges and universities are contributing to student success—particularly through internal and external partnerships—via our Models of Excellence program, also being sponsored exclusively by Higher One. For more information and to apply to be named one of the inaugural Models of Excellence institutions, visit www.universitybusiness.com/mox.

Marist College

• INFORMATION TECHNOLOGY

Hire Education

“Your reputation is at risk.”

That was the message relayed to Marist College Vice President and CIO Bill Thirsk by a hiring manager who had been contacted by a former employment candidate. The job seeker had attempted to apply for a position through the New York college’s online employment system, only to give up because the user experience was so frustrating.

This was not an isolated incident. The college had purchased and implemented a recruitment software package in hopes of streamlining the application process and attracting high-quality faculty and administrators. But things weren’t working out as planned.

“What we had hoped to have happen was the reverse,” says Peggy Kuck, director of Marist’s enterprise solutions group. “Because of the poor user experience, it was actually a detriment to our candidates to complete the hiring process.”

After a failed attempt to get the original vendor to improve the package the college had bought, Thirsk says, “it was time to look at other options.”

The best option was to take what Kuck calls “an intelligent risk” and develop an in-house solution—an open-source online recruitment system that Marist could customize.

The new system integrates in real time with Marist’s existing enterprise resource planning software, something the old software did not do. This saves time for candidates as well as HR staff. The system allows for easy uploading of resumes, cover letters and related documents that are converted to PDFs for review by hiring



An open-source HR recruitment system saves money and attracts higher-quality candidates.

managers and search committees. It also produces a workflow that generates automatic emails to applicants, hiring managers, HR and others.

Marist’s applicant pool has increased and more candidates are completing the application process. “We’re now attracting the high-quality faculty and professional staff we had hoped for,” Kuck says. “That is a detail that shows we have done what we set out to do.”

Marist also saved the \$18,000 it was paying the vendor in licensing fees each of the last two years.

And because the solution is open source, other institutions can benefit. Marist will share the code behind its new system with other colleges to help in controlling costs.

“There is massive disruption potential right now for colleges and universities to get together to form communities of practice to build software around certain disciplines,” Thirsk says. “We would love to see higher education invest in teaching and learning rather than buying commercial products. It’s a new way of doing business. You end up with a better product and a better experience.”

And that’s something to be proud of. —Thomas W. Durso

University of Alabama

• AUXILIARY SERVICES • OFFICE OF INFORMATION TECHNOLOGY

Self-Service ID Cards

Since 1995, the University of Alabama has issued electronic debit and ID cards, called Action Cards, to its students. These personalized, chip-and-magnetic-stripe plastic cards provide students with access to buildings and events, meals in the dining halls and spending money for on- and off-campus retailers. The cards also have a photo on the front for visual identification.

The cards are multifunctional and essential, yet, until recently, they were time-consuming during orientation to produce. The plastic cards arrive ready for activation of the magnetic stripe and

chip and the input of the student’s name and photo. But preparing a card used to require taking a photo of a student, saving and printing it, getting the chip ready to record data associated with that card and imprinting the mag stripe. It could take as many as five minutes to produce a card and check that the stored information was accurate. That may not sound like a lot of time, but those minutes add up quickly when hundreds of students are lined up each orientation session to have their cards created.

Not to mention: “The lines looked bad,” says Jeanine Brooks, Action Card director. “We didn’t want that to be [the students’] first experience at the university.”

In addition, to ensure students could use funds loaded onto

Pratt Institute

• FINANCIAL AID

Nonstop Service

Managing personal finance is difficult enough for working professionals. For college students, it can be almost impossible. Part of the reason is that there are multiple finance-related aspects to higher education, and they have different, often confusing languages, says Nedi Goga, executive director of student financial services and compliance at Pratt Institute in Brooklyn.

“Financial aid speaks in terms such as offered, awarded, approved and posted, which is money that’s anticipated but not actually received,” he says. “The bursar wants to talk about money in the bank already. That’s what the discrepancy [often] is. The language is different from the students’, where they have to bring those together and try to make sense of them.”

And in Pratt’s case, financial departments were so siloed that students found themselves bouncing back and forth in an effort to determine the status of their bills, financial aid and other financial matters. Goga called it “shuttle diplomacy.”

Streamlining that process involved two steps. The first was eliminating back-and-forth inquiries and giving students a single point of contact on financial issues. The second was using technology to target information to students and give them self-service tools to be used at their convenience.

“A holistic approach to managing money and financial planning is what I think has come out of this,” Goga says. “Students and parents sit down and talk with one person about every single aspect of their student finances.”

Pratt didn’t have to buy new technology, just make better use of what it already had. Goga’s team and IT staff developed the self-



Located in Myrtle Hall, the Pratt Institute’s Bursar and Financial Aid offices have taken a holistic approach to serving students.

service tools and added them to the portal students use to access coursework and communicate with instructors, among other tasks. Information such as account status and loan processing documentation is now available at any time of day and from any location.

The benefits were considerable and wide-ranging. Student visits to Goga’s department dropped by 60 percent, and wait times plummeted from an average of 45 minutes to just seven. Financial aid refund delivery time was halved. Students are reporting greater customer satisfaction levels, and complaints are down. The school’s retention rate jumped by three percentage points in just one year. Perhaps the only downside is that staff size was reduced from 30 to 17, though that saved Pratt half a million dollars.

“We don’t want to be one-stop,” Goga says. “We want to be nonstop. That’s the key. Whether submitting forms, uploading documents, requesting loans, getting refunds or making payments, students and parents can perform and track all their transactions using self-service tools available on their portal. It’s the Amazon service model with the guidance of a personal financial advisor.”

—T.W.D.

Students no longer need to stand in long lines at orientation to obtain their ID cards.

their Action Cards to pay for lunch during one of the 20-plus summer orientation sessions, the auxiliary services department had to work at breakneck speed.

Students would check in at 8 a.m. for orientation and the department had to have all of the Action Cards produced and ready for distribution by 10:30 a.m., when students broke for lunch, Brooks says. The department typically produced around 8,000 cards during those summer orientation sessions.

And the task was becoming more challenging. The university had 20,000 students in 2004—by 2014, enrollment had nearly

doubled. Keeping pace with demand for Action Cards would soon have been a losing proposition and would have required at least four temporary employees to be hired during the summer just to produce cards, Brooks says.

After learning that other universities had taken card production online, Brooks made the change in 2010. With the help of the information technology department, the university developed a program in-house to enable students to log in remotely, enter relevant personal data and upload a photo they liked.

Now Action Card production takes one minute per card and the work can be spread out over the whole summer, rather than rushed as part of orientation. “We provide much better customer service with the new system,” says Brooks.

—Marcia Layton Turner

College of the Desert

• ADMISSIONS AND RECORDS

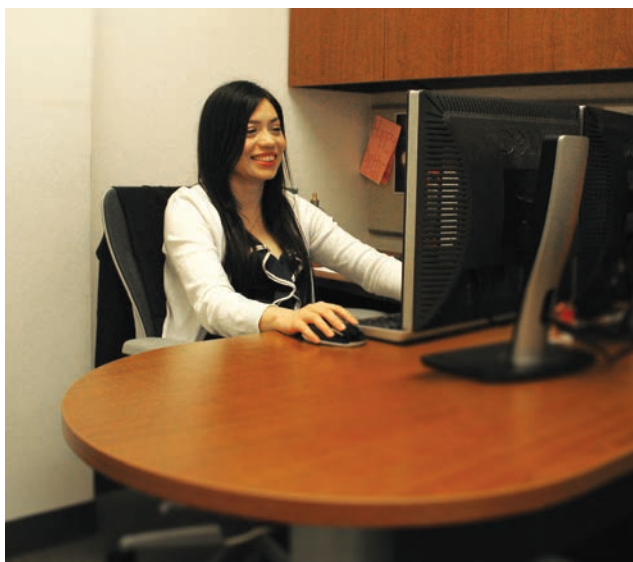
Diligent Data

Higher education administrators looking to increase efficiency frequently cite document management as a major roadblock. Even so, the numerous flaws in the system used by the College of the Desert's admissions and records department went beyond the typical woes.

Half a dozen faculty and staff at the California community college might end up handling a single document. Lost materials and angry phone calls were commonplace. Documents had to be manually scanned and attached to student records. An incorrect label could get an item misplaced forever. And the lack of integration with the college's student information system required staffers to log into multiple applications when addressing student issues.

"It was cumbersome. It was taking too long. We weren't serving students to the best of our ability," says Annebelle Nery, the college's executive dean of institutional effectiveness, educational services and planning.

Administrators set their sights high in searching for a solution. They wanted a system that could not only automate workflows but also mine data from the documents entered into the system.



Digitized recordkeeping streamlines processes for staff working in Admissions and Records while also providing students with access to forms at any time.

After an RFP was sent out and potential vendors who responded were reviewed, administrators chose Laserfiche, whose enterprise content management tools provided digitized recordkeeping, greater transparency and much more integration.

Thanks to the new enterprise content management system, the time spent processing applications and petitions has been cut by 40 percent.

Laserfiche gives students access to forms and applications 24 hours a day, seven days a week. Students can submit electronically and upload supporting documents. The system attaches those materials automatically to a student's record and emails students with the status of their requests at every step of the way. And thanks to Laserfiche's integration with the college's ERP, Colleague by Ellucian, staff can offer assistance without having to go digging through multiple systems.

The silence of the system's users told Nery she had a success on her hands. "It was relatively quiet," she says of the rollout. "People just used the forms and submitted them electronically."

The time spent processing applications and petitions has been cut by 40 percent. Because of the automatic notifications, email and phone inquiries are significantly down. And the student worker who formerly scanned inbound documents has been freed up to take on other tasks.

What has Nery especially excited is Laserfiche's ability to use transcript and application information to place students in the appropriate classes and recommend needed services. That aspect of the system is not operational yet, but it has performed well in testing, Nery says. She compares it to the way internet companies detect keywords in searches and emails, then suggest products and services to users.

"What Laserfiche delivered not only exceeded my expectations but fulfilled this vision I had that we could be like a Google or Yahoo! and use the information around us in an efficient way without having to hire staff to do it all," she says. "That's my favorite part." —*T.W.D.*

University of Montana

• INFORMATION TECHNOLOGY

Unified Web Templates

Faced with increased competition for students and declining enrollment, the University of Montana centralized the oversight of its web presence to create a unified look and feel across all of its websites. The use of new templates reduced reliance on outside design firms, cut costs, helped meet accessibility compliance, and increased the pace at which new sites were created.

Previously, web design and development at the university had been much like the Wild West. Departments created their own sites on an ad hoc basis that was both inefficient and expensive, and they often hired outside designers for support.

“It was a free-for-all,” says CIO Matt Riley. “There was segmented activity that resulted in an overall poor web presence with little in the way of marketing, quality user experiences or even adequate accessibility.”

When faced with the prospect of declining enrollment in the very near future, the university rallied to shore up its online presence. The hiring of an associate vice president of marketing was one step. The next was recognizing that a cohesive marketing approach and more aggressive social media efforts were essential.

To unify the brand and to make websites more user friendly, developers, designers and marketing professionals from across the university teamed up for “Project Ponderosa” (the initiative was named for the majestic Ponderosa trees dotting the campus). The goal: Set design standards and create tools that campus departments could use to make functional websites that fit within an overarching university marketing image.

Each week, more than one new website is launching. And six existing websites per week are being converted to the new web templates.

Working with the Cascade Server content management platform, project participants designed flexible templates that they could implement themselves with little or no outside help. The web templates created by the initiative provided campus users with all of the configurations, modules, typesetting and fonts approved by the university, explains Riley. “They also allow a lot of flexibility,” but within the university’s brand guidelines.



UM gave Pinecone Awards as part of the web template project launch, with awards given to staffers in categories such as best user experience and most innovative.

The university’s IT department is available to assist any department, but thanks to the easy-to-follow templates, little support is typically needed. This has substantially increased the department’s capacity. “Now we can turn out large amounts of websites in a short amount of time with the same size staff,” Riley says.

“By working with tools and help from IT, they can very quickly design a new site, with lots of opportunities to adjust it along the way,” says Riley. “We’ve broken out of that paradigm of hiring outsiders due to the need for speed. Now UM’s IT is fast enough to meet everyone’s needs.”

The pace at which websites are being released is now much greater—more than one a week.

On top of that, existing websites are being converted to the new templates at a rate of six per week. There are currently approximately 500 websites housed on Cascade Server, and of those, more than 170 have converted to the new web templates. All sites should be converted by spring 2015.

“Ponderosa has helped the university remake itself through its web presence and be more competitive while at the same time expanding the usability of the web and access for all,” says Riley. —*M.L.T.*

Wright State University

• CAMPUS AUXILIARY
AND BUSINESS SERVICES

Creating a Printing Consortium

Wright State University invested significantly in printing equipment only to see demand decline. That led administrators to overhaul the Ohio institution's entire printing system.

By switching to a variable pay-per-print model based on volume and relying on one supplier to manage all its equipment, Wright State is saving \$750,000 per year. Sharing assets with two other universities in a consortium has further cut costs.

The institution's vision is to be recognized globally as an innovative educational leader. Its immediate challenge is to become more innovative while simultaneously reducing costs across the board.

The efficiency drive began when administrators realized that, as of 2013, Wright State's inventory of office printing assets consisted of 26 unique manufacturers and 676 unique models of desktop printer/copier/fax machines—65 percent of which were more than five years old and essentially obsolete. On top of that, 75 percent were dedicated to one particular computer, and, consequently, had lower reliability and higher support costs.

Officials innovated, seeking out colleges and universities in the region to form a consortium to share printing resources. **Central State University** and **Clark State Community College** immediately stepped up. After developing its vision and expectations—focused on quality, service and value—the consortium issued an RFP in search of a supplier to manage print in an enterprise manner on all three campuses.

After a comprehensive review, Xerox was selected and a contract signed to cover all networked devices for the next five years.



Executives from Central State U, Wright State U, Clark State Community College and Xerox are working to perfect the campus printing process.

In less than five months, the shared services production site was fully operational.

Now, says Polatajko, “we only pay for what we use.” And, he adds, “as the volume of business increases, the price to all existing partners declines. We all reap the benefit.” That will continue to be the case if the other colleges join the consortium, which looks likely.

The consortium's main print production facility remains on the Wright State campus, which also relies on three local offset print houses for overflow work. A fleet makes regular deliveries to all three institutions.

With an annual budget of \$4.16 million, the consortium expects to save \$1.1 million annually through the optimization of technology, the simplified pricing structure and reducing the user-to-device ratio from 1:1 to 5:1. Already, the number of devices and models has shrunk considerably, from 26 manufacturers to two, and from 676 models to eight—further simplifying maintenance.

Consolidating the printing process also reduces the university's print-related carbon footprint by 77 percent. In the end, improving efficiency benefits everyone. “Optimizing our resources helps to keep tuition affordable,” says Polatajko. —*M.L.T.*

Western Iowa Tech Community College

• MARKETING AND PUBLICATIONS

Prospective-Student Microsites

In two short years, Western Iowa Tech Community College upgraded from generic paper-based admissions packets to a personalized packet to online microsites tailored to each prospective student's needs and interests. Besides achieving higher application rates, the new MyHub program is saving on paper, printing and mailing.

Mailing an inch-thick packet of materials to every potential student was costing the Sioux-based college dearly. On top of the average \$5 it cost to print and mail each packet was the lengthy preparation process and the lag time before students received their

information, which was sometimes as long as two weeks, says webmaster Wendy S. Ohl.

Concerned about the process's inefficiency and expense, Ohl began investigating alternative approaches. In 2012, she moved the admissions materials online, creating a PDF brochure that could be personalized with information specific to a prospect's interests. However, that PDF was being printed and mailed.

So about a year ago, Ohl programmed a digital webpage system in ColdFusion using a MySQL database. Named MyHub, the

Portland State University

- ADMISSIONS
- NEW STUDENT PROGRAMS

Foldemort: No More Paper and Folders

Maybe the last thing you want to do in environmentally conscious Oregon is implement an efficiency-oriented solution that ends up resulting in greater paper use.

Administrators at Portland State purchased an enterprise content management solution for admissions, registration and records, financial aid and business services that—among other deficiencies—necessitated the printing of a prospective student’s application materials from one system in order to scan them into another. Under that system, says Christopher Skinner, assistant director of admission evaluation and processing, “we could never be paperless, for a lot of reasons. Primarily because there was nowhere for the actual application to go. The image was static. It just sat in the system.”

It’s not as if prospective students weren’t able to apply electronically. Online application has been a reality at Portland State for years, says Skinner. But the admissions team still had to print all of the applications and file them in a physical folder with evaluations, paper code sheets and paper committee review sheets. The system wasn’t even capable of storing application documents—transcripts had to be printed and scanned. All of this cost the university money (paper isn’t free) and time (printing and filing don’t happen by themselves).

The university opted for OnBase by Hyland to fully digitize student records and integrate them with the Banner by Ellucian student information system. Bye-bye, paper.

Thanks to OnBase, applications from prospective students and all supplementary materials are captured electronically and automatically routed for processing. This digital record keeping



Applicants with dreams of attending Portland State now learn the outcome of their applications at least two weeks earlier than before.

continues as students matriculate. Integration with Banner gives admissions counselors and others the ability to view student records without touching a single piece of paper.

As a result, admit decisions are made far more quickly—at least two weeks more quickly—and 850 hours of student work time has been saved because physical folders and files are no longer used. Eliminating the need to print applications and file them with evaluations and reviews has saved almost 40,000 sheets of paper. Because OnBase allows for electronic transmission of admission letters to applicants, the university has saved about \$50,000 a year in printing and mail. And, Skinner and other officials have noticed, morale has improved because searching by hand is a thing of the past.

Ultimately, OnBase has enabled Portland State to achieve one of the holy grails of admissions, Skinner says.

“The overwhelmingly positive part of the experience is we were able to do away with admissions application folders,” he says. “This is the first office where I’ve seen that succeed.” And the solution can be used elsewhere on campus, he says: “Anywhere where you can trigger a workflow.” —*T.W.D.*

system allows prospective students to fill out a short form regarding their interests, and generates a dynamic, personalized microsite. On that site, students find program information, required classes, clubs, events, housing, financial aid, a getting started checklist, sports team try-out dates and other facts specific to their situations.

Students also don’t need to wait two weeks to receive a printed packet from admissions. They receive an email almost immediately that includes a link to their personal page, which is regularly updated with new events and class information.

MyHub is saving the college approximately \$7,200 a year in printing and mailing costs. And of those students who sign up for a MyHub page, 75 percent to 80 percent apply for admission—a

Not only is the college more responsive to applicants, but it has saved more than \$7,000 a year on paper, printing and mailing.

big jump. “You can see the cause-and-effect,” says Ohl. “You can see who signed up and who applied.” Perhaps thanks in part to the new tool, WITCC has reversed its admissions slump, she says.

Ohl credits the whole marketing team with the process’ improved efficiency and effectiveness. “It was a team effort,” she says. “I don’t like change for the sake of change, but I do like it for greater efficiency.” —*M.L.T. UB*