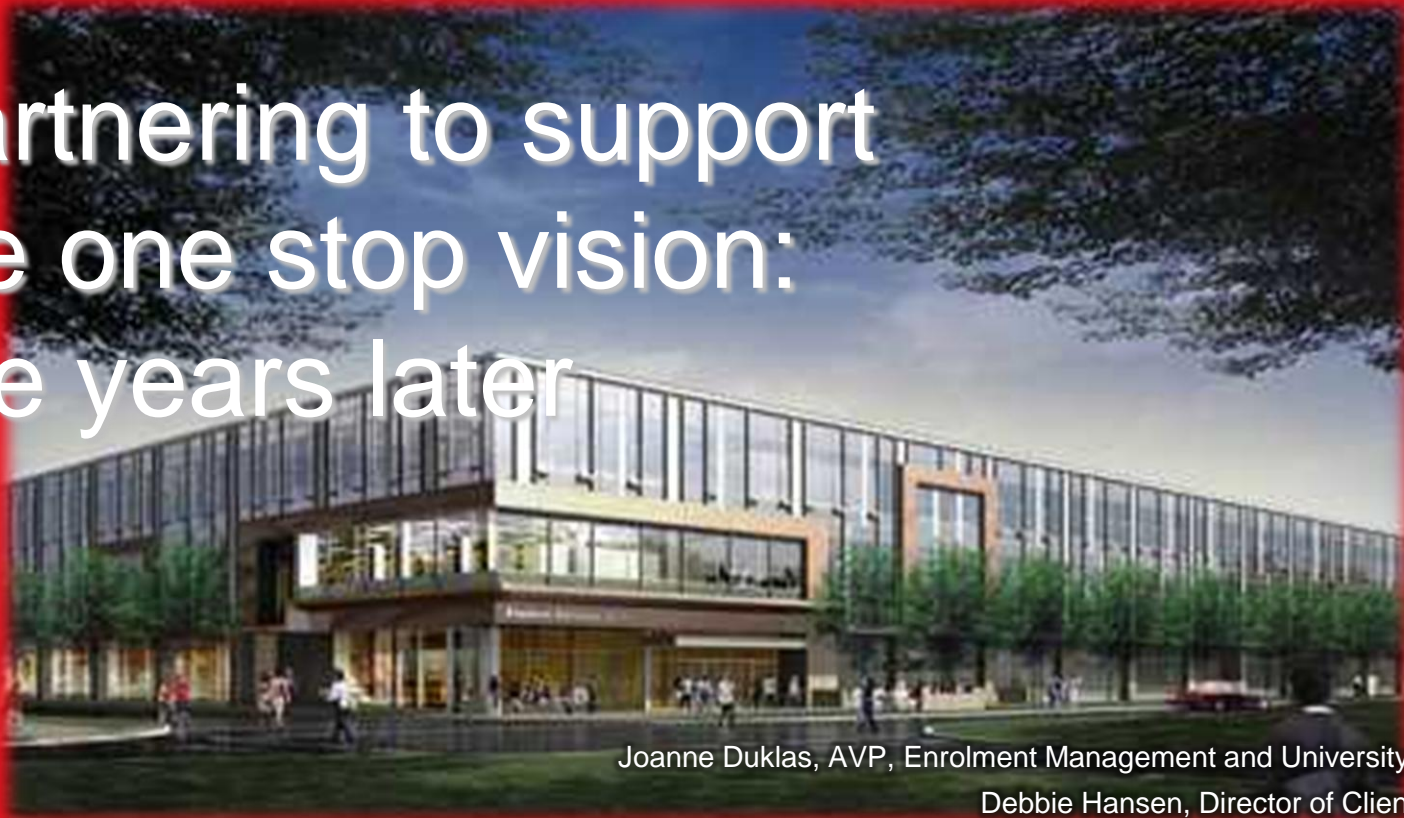


Partnering to support the one stop vision: five years later



Joanne Duklas, AVP, Enrolment Management and University Registrar
Debbie Hansen, Director of Client Services

YORK



UNIVERSITÉ
UNIVERSITY

redefine THE POSSIBLE.



Agenda



1. Setting the Stage
2. Reflecting on Partnerships
3. Vision 2004 and History Prior to 2004
4. Key Partnerships
5. Spotlight on Student Client Services
6. Spotlight on the Registrar's Office and Student Financial Services
7. Service and System Initiatives
8. Communication Initiatives
9. Overall Lessons Learned
10. Questions

Setting the Stage: York University



- Young institution
- 55,000 students - undergraduate, graduate (not including continuing education)
- Vibrant student body
 - First Generation, Generation Y
 - Middle to low income
 - Financial need is high
 - Very diverse
 - High school, college and university transfer, mature students, international, Aboriginal
 - Urban location
 - Somewhat self contained campuses – primarily two
- Ten Faculties (one with 27,000 students)
- Highly energetic, dynamic, changing environment

Setting the stage: Registrarial Services



- Admissions: Well over 200,000 prospects, 50,000 applicants and 14,000 admits per year; 100,000+ documents, attends hundreds of school visits, participates in the provincial, national and international recruitment markets
- Registrar's Office and Student Financial Services: 20,000 + students on the provincial loan program, deals with close to 100,000 documents, over 1000 on WorkStudy, disburses \$30M in scholarship funding, graduates approximately 10,000 students per year
- Client Services: saw 560,000 people and handled 430,000 since 2004
- Underfunded
- Multiple and complex government compliance requirements
Competitive urban market place

Feeling Somewhat Disadvantaged :-)



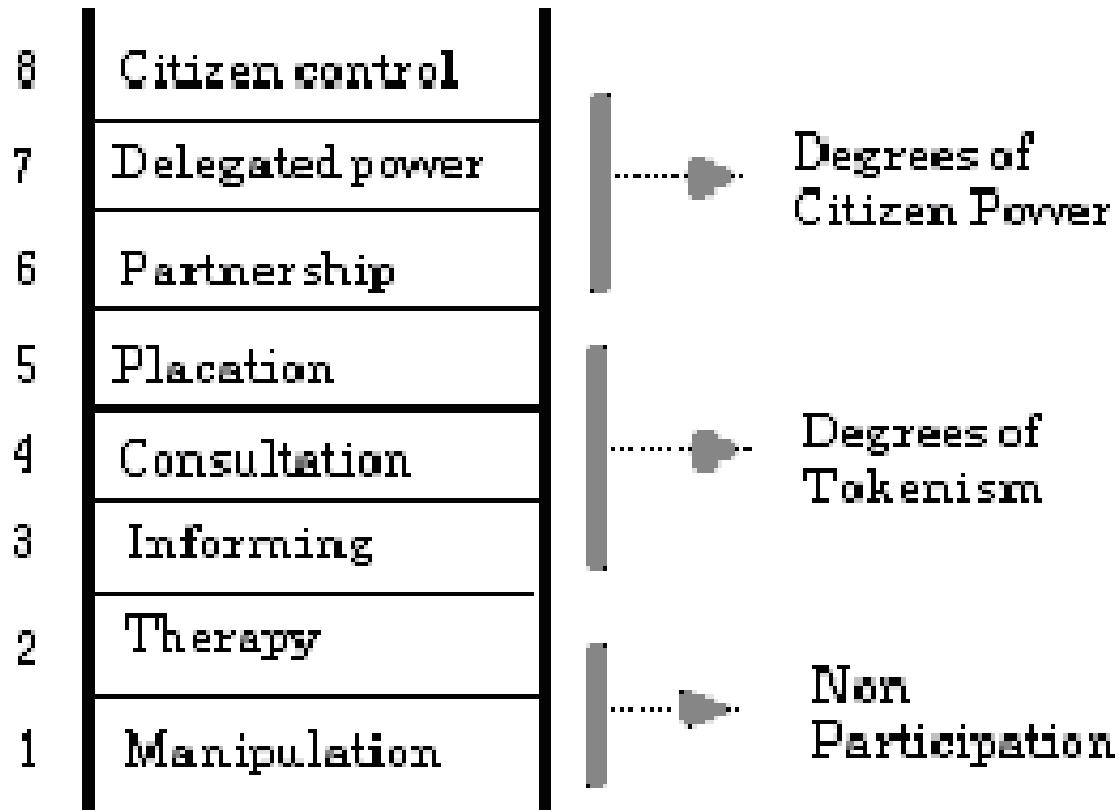
**Us on
a Good
Day!**

Four Stages to Partnerships



- Initiating
 - Who started the partnership will influence its initial style of operation.... and this may need to change
- Beginning
 - Who, What, Where, How
- Executing
 - Communicate, Manage
- Closing
 - What works, what doesn't?
 - Planning for the long term – Is the partnership working? Does it add value?

Partnering for Success



What Makes for a Solid Partnership?



- Wagner and Muller
 - The eight elements:
 - complementary strengths
 - a common mission
 - fairness
 - trust
 - acceptance
 - forgiveness
 - communicating
 - unselfishness

You Give Me Half the Fish and I'll
Tell Mommy not to Kill You



PARTNERSHIP

How did we do it?



- Started with a Vision
- Articulated the way forward
 - various visioning exercises, consultation meetings, etc.
- Created various partnerships
- Hired in new expertise
- Created a new building
- Created an Admissions Welcome Centre and a first stop called Student Client Services
- Launched a series of new systems and online self-serve options
- Reorganized back of house areas

Went through some bumps along the way → still learning

Where it all Began: Vision in 2004



- Creating a new Division of Students
- Create a student-focused organization
 - Focus on aligning culture, organization, systems and service model to student-focused
 - Improve recruitment, retention and student satisfaction
- Create a one-stop student service centre
 - Admissions Welcome Centre
 - Student Client Services

Office Locations pre 2004



http://www.yorku.ca/yorkweb/maps/Keele_Jun2010_cmyk.pdf - Windows Internet Explorer

http://www.yorku.ca/yorkweb/maps/Keele_Jun2010_cmyk.pdf

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http://www.yorku.ca/yorkweb/maps/Keele_Jun2010_...

1 / 1 116% Find

LEGEND

- VISITOR PARKING
- RESERVED PARKING
- PARKING GARAGE
- BLUE LIGHT EMERGENCY PHONE
- PARKING INTERCOM
- SECURITY
- PICK-UP/DROP-OFF AREA
- TTC STOPS
- GLENDON-KEELE SHUTTLE & GO TRAIN SHUTTLE STOPS
- 66SAFE/CAMPUS SHUTTLE
- BRAMPTON TRANSIT
- TTC WHEEL-TRANS STOPS/ YRT MOBILITY PLUS

Map labels include: IAN MACDONALD BLVD, OTTAWA RD, VANER LANE, YORK BLVD, THE POND RD, KEELE ST, HARRY W. ARTHURS COMMON, DANBY WOODS, BOYNTON WOODS, STONG POND, ARBORETUM, SAYWELL WOODS, MALOGA GARDENS, PASSY CREEK, NELSON RD, OSGOODE WOODLOT, LIBRARY LANE, CAMPUS WALK, CAMPUS DRIVE, CAMPUS WALK, VANER LANE, WINTERL'S RD, CHIMNEYSTACK RD, SILVERY RD, SILENTY RD, BOYER WOODLOT, MCLAUGHLIN, DITAWA RD, VANER LANE, FINE ARTS RD, SERICA LANE, OTTAWA RD, IAN MACDONALD BLVD, AMES GILLES ST, YORK UNIVERSITY BUSWAY, THE POND RD, TO FINCH AVE WEST, MAIN ENTRANCE, CANLAN ICE SPORTS PARKING, SHOREHAM DR, ATHABASCA BLVD, THE POND RD, HOOVER RD, MALOGA GARDENS, PASSY CREEK, NELSON RD, OSGOODE WOODLOT, LIBRARY LANE, CAMPUS WALK, CAMPUS DRIVE, VANER LANE, WINTERL'S RD, CHIMNEYSTACK RD, SILVERY RD, SILENTY RD, BOYER WOODLOT, MCLAUGHLIN, DITAWA RD, VANER LANE, FINE ARTS RD, SERICA LANE, OTTAWA RD, IAN MACDONALD BLVD, AMES GILLES ST, YORK UNIVERSITY BUSWAY, THE POND RD, TO FINCH AVE WEST, MAIN ENTRANCE.

Done Unknown Zone

One Stop Student Service Centre in 2004



http://www.yorku.ca/yorkweb/maps/Keele_Jun2010_cmyk.pdf - Windows Internet Explorer

http://www.yorku.ca/yorkweb/maps/Keele_Jun2010_cmyk.pdf

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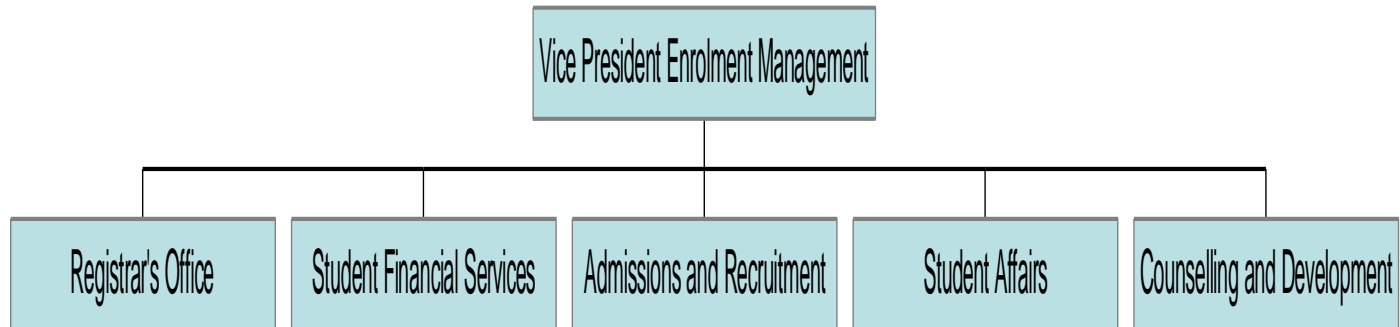
LEGEND

- VISITOR PARKING
- RESERVED PARKING
- PARKING GARAGE
- BLUE LIGHT EMERGENCY PHONE
- PARKING INTERCOM
- SECURITY
- PICK-UP/DROP-OFF AREA
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- BRAMPTON TRANSIT
- TTC WHEEL-TRANS STOPS/ YRT MOBILITY PLUS

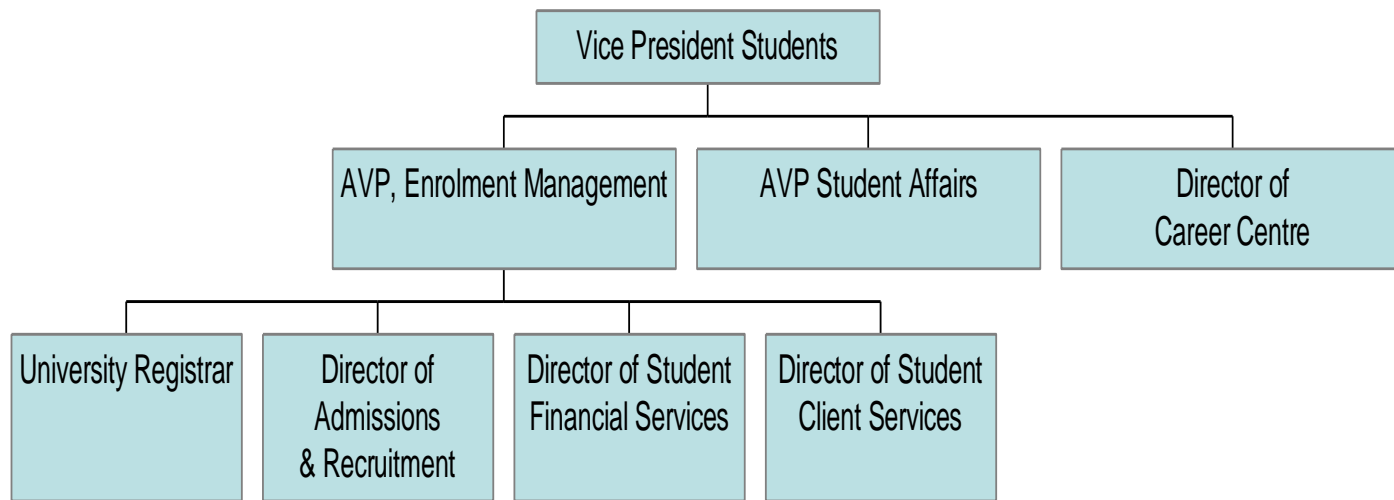
Bennett Centre for Student Services

Done Unknown Zone

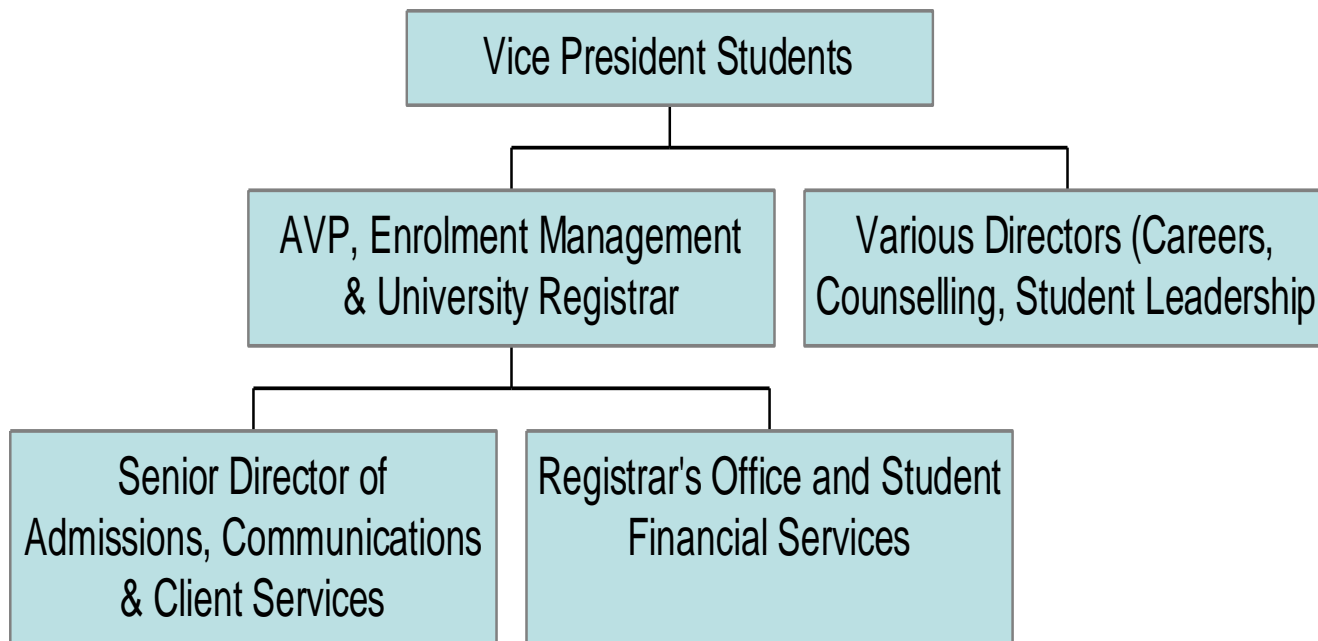
Organizational Structure pre 2004



Organizational Structure 2004



Organizational Structure Today



Key Partnerships Then and Now



- Faculties
- Academic colleagues
- Students
- Senior leadership
- Across registrarial portfolios
- Systems team

Some Partnership Examples



- In-house
 - Joint Action Committee
 - Executive Team Meetings
 - Operational Management Meetings
- Faculties
 - Recruitment Council
 - Registrar’s Roundtable
 - Admissions Advisory Council
 - Registrarial Liaison Committee
 - Enrolment Management Group
- Students
 - Financial Aid Recipient and Registrarial Advisory Group
- Governance and policy
 - Senate
 - Senate curricular committee

What Was Created



- New department: Student Client Services
- New systems
- New Self-serve options
- Reorganized existing departments: Registrar's Office and Student Financial Services
- New training programs
- New communications strategy

Key words: integrated and informed

One Stop In-person and by Phone: Student Client Services



Service Areas

1 Main Reception

- Triage and handle the “fast track” service items
- Provide “tickets” to students for SCS reps
- General way-finding

2 Front Line

- 10 Visitor Stations
- 1 Private Office for OSAP Appointments
- Tickets/Appointments

Since the doors opened in SCS in 2004 we have serviced

560,000

3 Call Centre

- Calls Answered since 2004

430,000

Student Client Services Reception




Student Client Services Appointment Zone



Student Client Services Web site





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Student Client Services

Main page
FAQs
Directions & Map
Online Services

STUDENT CLIENT SERVICES

OSAP document pick-up and OSAP enquiries
BY APPOINTMENT ONLY

Need a transcript?
Order online to get it quickly and easily

In-person or by-phone registrarial and financial services for current students.

Feel the need for speed? Get the one-stop advantage!

- Enquiries related to your student file.
- Changes to personal information and records.
- Requests for reactivation, non-degree status and faculty transfers.
- Drop forms in drop box.

Required Identification

Bring your government issued Social Insurance Card and government-issued photo identification with you. Valid identification includes:

- a driver's licence,
- passport,
- citizenship card,
- permanent resident photo card or
- Age of Majority Card or
- you may present your photo Ontario Health card (YU card is not acceptable).

Multiple Service Options

ONLINE SERVICES	DROP OFF BOX
<p>Many student services can quickly and easily be found or transacted online, with My Online Services. You can pay your student account by telephone or internet banking.</p>	<p>There is no need to wait in line and see a service representative to submit completed forms. Drop off documents and payments in the drop box on the main floor of the Student Services Centre. If you have questions about completing documents, call us or come and see us in person.</p>
IN-PERSON SERVICES	PHONE SERVICES
<p>There are some services that require an in-person visit, such as picking up OSAP documents. The in-person Student Client Services offers:</p> <ul style="list-style-type: none"> A personal and comprehensive service option. 	<p>Call Student Client Services at (416) 872-YORK (9675). Incoming calls are queued to respond on a first-called, first-served basis.</p>

Ask A Student Services Expert

Enter in question format:
"How do I get a transcript?"

Ask

Hours of Operation

Monday	9am - 4pm
Tuesday	9am - 4pm
Wednesday	9am - 6:30pm
Thursday	9am - 4pm
Friday	10am - 3pm
Saturday	closed
Sunday	closed

[Directions & Map](#)

Phone Service Hours of Operation

Monday to Thursday 9am - 4pm
Friday 10am - 3pm

Survey

Take our quick [feedback poll](#) and let us know what services you are looking for.

Take Action

I have a Registered Education Savings Plan (RESP) and have forms from the plan to be completed. [What do I need to do and where do I need to go?](#)

[When is payment on my student account due?](#)

Staffing



Staffing of Units – front / back-office

Grand parented from three areas – Admissions / RO / SFS

Agreement limitations – training period

Performance management expectations

Staffing Levels



Student Client Services (reception / in-person / call centre)

- Initially (2004)
 - 21 + six work/study - temporary with two week rotation

- Today (2010)
 - 15 + two work/study - temporary with two week rotation

Comprehensive Training Modules



RO/SFS Intranet

REGISTRARIAL SERVICES: REGISTRAR'S OFFICE AND STUDENT FINANCIAL SERVICES

- Home
- Policies and Procedures
- Training
- > **Schedule**
- > Course Descriptions
- > Registration Form
- > Manuals for Courses
- > My Courses
- > Glossary
- Registrarial Roundtable
- Meeting Minutes
- Academic Decision Trees
- Archived Information
- Contact Us

Training - Schedule

The training schedule is listed below.

You may also want to view these dates on a calendar format by month: [June](#), [July](#), [August](#), [September](#).

Course	Code	Date	Time	Location
Overview for Managers	MAG 101	Tuesday, July 13, 2010	9:30 - 11am	W238 BCSS
Overview for Managers Part 2	MAG 102	Tuesday, July 20, 2010	9:30 - 11am	W238 BCSS
Introduction to the Student Information System (SIS)	SIS 101	Tuesday, June 22, 2010	9:30 - 11:30am	W238 BCSS
		Thursday, Aug. 12, 2010	9:30 - 11:30am	W238 BCSS
Student Service Tools for Front Line Experts	SIS 102	Monday, June 28, 2010	9:30 - 11am	W238 BCSS
		Wednesday, Aug. 18, 2010	9:30 - 11am	W238 BCSS
Introduction to the Enrolment Assessment System (EAS)	SIS 103	Wednesday, July 7, 2010	9:30 - 11am	W020 BCSS
Course Offering System (COS)	SIS 201	Thursday, July 15, 2010	9:30 - 11:30am	W020 BCSS
Managing Course Access Specifications (CAS)	SIS 301	Tuesday, Aug. 10, 2010	9:30 - 11:30am	W020 BCSS
Introduction to SIS Web Applications	Web 101	Wednesday, June 23, 2010	9:30 - 11am	W238 BCSS
		Thursday, Aug. 19, 2010	9:30 - 11am	W238 BCSS
Introduction to GEM3/YDM	Web 102	Tuesday, Aug. 17, 2010	9:30 - 11am	W238 BCSS
Introduction to YDA (York Degree Audit)	Web 103	Wednesday, Aug. 11, 2010	9:30 - 11:30am	W020 BCSS
YDA / Coding Exceptions	Web 104	Thursday, Aug. 26, 2010	9:30 - 11am	W238 BCSS
York Style	Web 105	Wednesday, July 28, 2010	9:30 - 11am	W024 BCSS
Money Matters!	Web 106	Thursday, June 17, 2010	9:30 - 11am	W238 BCSS
WSE Overview	Web 107	Monday, Aug. 9, 2010	9:30 - 11am	W238 BCSS
		Thursday, Aug. 19, 2010	2:30 - 4pm	W238 BCSS
		Friday, Aug. 27, 2010	9:30 - 11am	W238 BCSS
		Tuesday, Sept. 14, 2010	9:30 - 11am	W238 BCSS
Action History Made Easy	Web 201	Thursday, July 22, 2010	9:30 - 11am	W238 BCSS
		Tuesday, Aug. 24, 2010	9:30 - 11am	W238 BCSS

June 2010

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3 SIS 103	4	5
6	7	8	9	10	11	12
13	14	15	16	17 Web 106	18	19
20	21	22 SIS 101	23 Web 101	24	25	26
27	28 SIS 102	29	30			

July 2010

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1 Canada Day University closed	2	3
4	5	6	7 SIS 103	8	9	10
11	12	13 MAG 101	14	15 SIS 201	16	17
18	19	20 MAG 102	21	22 Web 201	23	24
25	26	27	28	29	30	31

Staff Training



- One-on-one/small group training
- Shadowing
- Training in lab
- Training sign-off
- Registrarial Services Training (Intranet)
- Daily updates
- Staff listserv
- Staff Development through Human Resources

Student Client Services – Hours of Operation



Reception, In-person and Call Centre

Monday, Tuesday, Thursday - 9am to 4pm

Wednesdays – 9am to 6:30pm

Fridays – 10am to 4pm (summer until 3pm)

May 2008 hours of operation extended on Wednesdays until 6pm

Student Client Services – Peak Business Hours



	NOT BUSY 	BUSIEST 	BUSY 
MONDAY TO THURSDAY	9-11am	11am-2pm	2-4pm (2-3pm June-August)
FRIDAY	10-11am	11am-2pm	2-4pm (2-3pm June-August)



Strategies/Best Practices for Busy Times – Student Client Services



- “D” ticket, express desks (triage)
- “Greeters” with campus maps/general way-finding
- Signage, handouts
- More appointment times made available
- Loan Zone moved to another building from August to September

Challenges for Student Client Services



- Staffing levels
- Developing a strong, supportive culture
- Staff turnover
- On-going training
- Technological enhancements (call centre)
- Communication Issues

Lessons Learned in Student Client Services



- Reception – role and focus
- In-person – security issues
- Electronic line management system
- Call Centre – pods
- Express desk – transactional role
- Cohesive space - call centre and in-person
- Staffing – hire “new” staff or use existing?

Who's Helping to Hold up SCS?



Registrar's Office and Student Financial Services



Student Financial Services

- Internal departments: Financial Aid, Student Accounts, Scholarships and Bursaries
- Role – policy, oversee the financial record, ministry liaison
- Service
- Training
- Communications
- Students with disabilities

Registrar's Office and Student Financial Services (cont)



Registrar's Office

- Internal departments: Records and Document Management, Academic Scheduling, Registrarial Systems and Communications
- Role – Policy, oversee the academic record, Senate/Board liaison
- Service
- Systems
- Training
- Communications
- Students with disabilities

Service and System Initiatives



- Changing infrastructure systems
- Providing online Services
- Weighing transactional versus longer appointments (e.g. OSAP, Express Desks) – sometimes first come, first serve isn't always better
- Changing business (e.g. Loan Zone)
- Changing student expectations and culture

Loan Zone



Communication Initiatives



- Facebook and Twitter
- ASK a Student Services Expert
- E-mail
- Student Portal
- Current Students Web site – 20,000 URLs
- Online tutorials (e.g. Understanding your grade report)

One Stop Online



Current Students

Home

- [Courses and Enrolment](#)
- [My Student Records](#)
- [Money Matters](#)
- [Academic Support](#)
- [Student Life](#)
- [Campus Services](#)



COURSES & ENROLMENT >>

[Add/Drop a course](#), [Find out when I can enrol](#), [Course Timetables](#), [Calendars](#), [Enrolment Guides](#), [Important Dates](#), [Exams](#), [More...](#)



MY STUDENT RECORDS >>

[View my current fall/winter grade report](#), [View my current summer grade report](#), [Order my transcript online](#), [Update my personal information](#), [Convocation](#), [More...](#)



MONEY MATTERS >>

[Student Account Online Statements](#), [Government Financial Aid](#), [OSAP](#), [Financial Document Tracker](#), [Fees](#), [Refunds](#), [Scholarships](#), [Awards and Bursaries](#), [More...](#)



ACADEMIC SUPPORT >>

[Academic Advising](#), [Learning Skills](#), [Disability Services](#), [Exchange Programs](#), [Libraries](#), [Colleges](#), [More...](#)



STUDENT LIFE >>

[Campus Events](#), [Colleges](#), [Sport and Recreation](#), [Clubs and Organizations](#), [Career Support](#), [Peer Support](#), [More...](#)

ASK

a Student Services Expert

Type your complete question here

[Top 10 Questions](#)

GO!



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One Stop Online



MY ONLINE SERVICES ▶

My Online Services

Courses & Enrolment

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[Plot my Class Schedule](#)
[My Exam Schedule](#)
[Log into WebCT](#)
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My Student Records

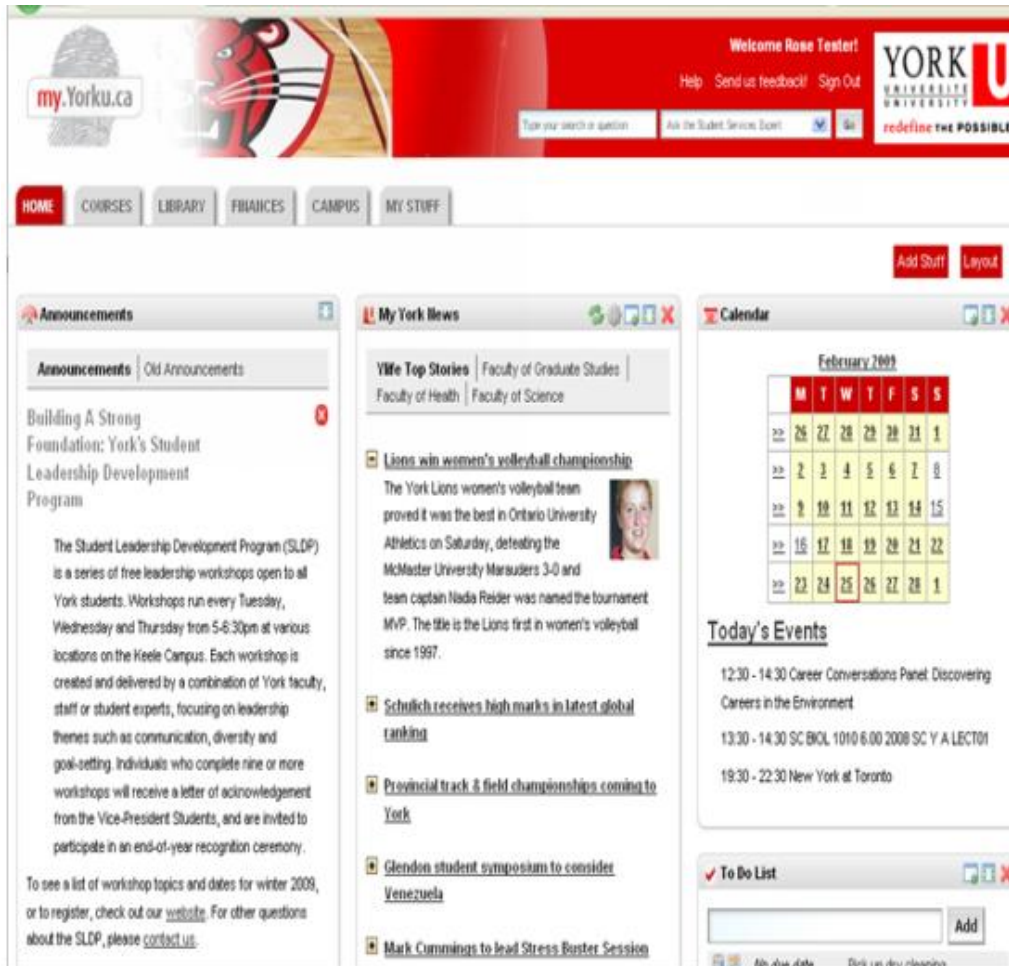
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[View my Fall/Winter 2009-2010 grade report](#)
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[Update my emergency contact information](#)
[Verify my college affiliation](#)
[RESP - Verification of Enrolment and Registration](#)
[Enrolment and Registration Confirmation Letters](#)



Logging In
[All about Passport York](#)



Online Portal

my.yorku.ca

Welcome Rose Tester! Help Send us feedback! Sign Out

YORK UNIVERSITY UNIVERSITY redefine the POSSIBLE

TYPE your search or question Ask the Student Services Expert

HOME COURSES LIBRARY FINAICES CAMPUS MY STUFF

Add Staff Layout

Announcements

Announcements | Old Announcements

Building A Strong Foundation: York's Student Leadership Development Program

The Student Leadership Development Program (SLDP) is a series of free leadership workshops open to all York students. Workshops run every Tuesday, Wednesday and Thursday from 5-6:30pm at various locations on the Keele Campus. Each workshop is created and delivered by a combination of York faculty, staff or student experts, focusing on leadership themes such as communication, diversity and goal-setting. Individuals who complete nine or more workshops will receive a letter of acknowledgement from the Vice-President Students, and are invited to participate in an end-of-year recognition ceremony.

To see a list of workshop topics and dates for winter 2009, or to register, check out our [website](#). For other questions about the SLDP, please [contact us](#).

My York News

YWe Top Stories | Faculty of Graduate Studies | Faculty of Health | Faculty of Science

- Lions win women's volleyball championship**
 The York Lions women's volleyball team proved it was the best in Ontario University Athletics on Saturday, defeating the McMaster University Marauders 3-0 and team captain Nadia Reider was named the tournament MVP. The title is the Lions first in women's volleyball since 1997.
- Schulich receives high marks in latest global ranking**
- Provincial track & field championships coming to York**
- Glendon student symposium to consider Venezuela**
- Mark Cummings to lead Stress Buster Session**

Calendar

February 2009

	M	T	W	T	F	S	S
22	26	27	28	29	28	21	1
23	2	3	4	5	6	7	8
24	9	10	11	12	13	14	15
25	16	17	18	19	20	21	22
26	23	24	25	26	27	28	1

Today's Events

- 12:30 - 14:30 Career Conversations Panel: Discovering Careers in the Environment
- 13:30 - 14:30 SC BIOL 1010 6.00 2008 SC Y A LECT01
- 19:30 - 22:30 New York at Toronto

To Do List

Add

Abi due date Pick us drv cleaning

ASK a Student Services Expert





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Current Students

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Courses and Enrolment

My Student Records

Money Matters

Academic Support

Student Life

Campus Services

ASK a Student Services Expert

For a quick answer, type your question in a short sentence, like this: "How do I pay my fees?", then click GO. Most undergraduate students will find the answers they need here. Students in Graduate Studies, Schulich and Osgoode should also refer to their home Faculty's Web sites for administrative, academic, financial and registrarial questions.



Top 10 Questions

1. [What is Moodle?](#)
2. [What majors or academic programs do you offer?](#)
3. [How is my GPA calculated?](#)
4. [How do I contact the Registrar's Office?](#)
5. [How do I contact Student Financial Services?](#)
6. [When and where is graduation?](#)
7. [Where are the department head offices?](#)
8. [Do you have any job openings?](#)
9. [Can I find a campus map?](#)
10. [How do I access WebCT?](#)



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Financial Intake Counselling




FINANCIAL ASSISTANCE
YOUR FIRST STEP!

Need money to study? Trying to find a straight and simple path through all the confusing financial aid information being shared? Cannot find that perfect all knowing person to help you? Look no further. We are here to help.

yorku.ca/moneymatters

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Helping Students Succeed



MONEY MATTERS
PLANNING FOR
FIRST YEAR AND BEYOND

York University is committed to ensuring that students with demonstrated financial need have the resources to cover the direct educational costs (tuition, books and mandatory course fees) of attending university.

yorku.ca/moneymatters

YORK **U**

Financial Graduannd Counselling



**PLANNING
AHEAD**
YOUR FINANCES FOR
GRADUATION AND BEYOND

As you enter your final year of undergraduate studies, it is important to stay on top of your finances to prepare for graduation and the possibility of further education. The following will provide you with helpful information on your student account, credit, repayment of your government student loans and sources for funding graduate school.

www.yorku.ca/money matters

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Overall Lessons Learned



- Managerial and leadership competencies do matter
 - subject matter experts versus good strategists, negotiators, and communicators
- Qualitative training also matters
 - Situational leadership, change management, project management, understanding personality styles, process mapping, root cause analysis and problem solving, etc.
- Alternative human resource opportunities can be beneficial
 - Short-term exchanges
 - Empowerment
 - Accountability
- Evidence based decision making is essential - Benchmark performance constantly

Have We Achieved Our Vision?



- Creating student-focused service?
 - Launched many tangible examples: Student Client Services, training, etc.
 - Launched more than 80 self-serve systems
 - Improved turnaround
 - Improved policy/procedural environment
- Realigned structures, systems and culture to a student-focused mindset?
 - Yes
 - Employee buy in; presenting our bureaucracy “face” to the students
- Do we have more to do? YES

Focus is Essential!



- Focus on people and partnerships
- Focus on systems and automation
- Focus on policy and procedural change

Find the right solutions to the real problems and avoid the noise

No animals were hurt in the making of this presentation!

Thank you!



Questions



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Debbie Hansen, dhansen@yorku.ca, 416-736-2100 ext. 70704