



memo

To	Unitec Council	Date	29 October 2015
From	Meredith Morgan Executive Director Organisational Development		
Subject	Student Services Blueprint Outcome Document.		

Recommendation:

That the Council approve the Student Services Blueprint Outcome Document.

Purpose:

The purpose of this memo is to seek Council approval of the Student Services Outcome Document for release to staff on the 6th November.

The memo provides:

- a high level summary of the feedback received through the consultation phase;
- an overview of the Student Services Operating model;
- a financial case;
- a communications plan leading up to and post release;
- identified key risks;
- an implementation timeline; and
- financial analysis comparison between actuals and transformation business case.

Introduction

The Student Services Proposal for Change was released on August 7 this year. The document presented the overall proposed future state Student Service model including a proposed three phased approach to implementation.

- Phase One focuses on the development and implementation of the Customer Services functions of the model. The Proposal for Change set out that these services be outsourced to and delivered by Concentrix.
- Phase Two focuses on the development and implementation of Student Life, Student Achievement, Benefits Realisation and Priority Groups Centre of Excellence functions of the model.
- Phase Three focuses on the development and implementation of Library and International and working towards full convergence from January 2017.

It was proposed that in Phase One, Customer Services, Help desk, Online Relationship Managers and Admissions specialists are outsourced to Concentrix, our on-site business and academic partner. Customer Services provides an improved and converged service made up of

the functions currently delivered by Student Administration, Student Central, and IMS Help desk, as well as a number of completely new services.

Staff and students were given one month (and a subsequent 9 day extension), to provide feedback on Phase One and the proposed overall Organisational, Social and Academic (OSA) model. Proposals will be released next year to consult on Phase Two and Three.

Following the initial one month consultation period, and the subsequent nine day extension, all of the feedback received was collated, themed, analysed, summarised and responses drafted to the summaries. This was considered by the Executive Leadership Team and subject matter experts.

The Outcome Document outlines the final decisions that have been made regarding the proposed changes for Phase One as well as a summary of all of the feedback received and the corresponding responses.

The Outcome document has been submitted in a final draft version as it is pending a final proof and external legal review of the content, noting that the feedback summary appendix has been reviewed already. This activity will be completed by 30 October and a verbal update will be provided as necessary.

Pending Council approval of the release of the documents, the Outcome Document will be shared with directly impacted staff in the first instance, followed by a communication to all staff and students on **Friday, 6 November**.

Overview of feedback received

There was a total of 103 submissions of feedback received from individuals and/or groups. The Blueprint Steering Group – comprised of the two Executive Deans and the Executive Director Organisational Development – have read and considered all feedback submitted and confirm that the feedback summaries in Appendix Three of the Outcome Document are an accurate reflection of the feedback received.

The items listed below are a summary of the changes made to the proposal document as a result of feedback. The changes have been reviewed and are not considered significant enough to require further consultation.

1. Alignment of Metrics

- a. All Key Performance Indicators (KPIs) for services to be examined to ensure that they align with overarching Unitec Strategic Targets.
- b. KPIs to be aligned (where applicable) across both Sector Alignment and Services Blueprint. Use a similar presentation of the information across both.
- c. Review and finalise the OSA model Outcomes Framework in collaboration with Subject Matter Experts.
- d. Undertake discovery and review of current Service Level Agreements between service units and academic units to ensure these are accounted for within new model.

2. Te Noho Kotahitanga and partnership

- a. Undertake partnership discussions to ensure that the Guiding Principles of Te Noho Kotahitanga are embraced and embedded in our ways of working together both locally at the project level and across the whole institution.
- b. Undertake partnership discussions to better understand;
 - i. strategic Māori governance,
 - ii. alignment with the Māori Success Strategy,
 - iii. the place and role of Māori leadership,
 - iv. te reo me ōna tikanga,

- v. and, mātauranga Māori.
- c. Ensure a greater level of engagement with Māori staff to co-create the phase 2 elements of the OSA model.

3. Online Relationship Manager Design

- a. ORMs will be assigned to prospective students earlier; from application rather than enrolment.

4. Library IT Projects

- a. Library IT projects will be brought into the scope of the Student Services Blueprint to provide visibility of initiatives that affect the student experiences and ensure that they all are in line with the overall technology direction.
- b. The activity to develop the requirements for technology in the future is underway with workshops held with identified stakeholders, including library representation, to have all development, integration and implementation work completed in time for finalisation of the Phase Two of Student Services Blueprint.
- c. This work will also include clear identification of roles and responsibilities in managing the systems, relationships with vendors and the ownership of the business context and compliance requirements of the service.

5. Nomenclature

- a. Undertake stakeholder engagement (including student stakeholders) to determine the names for services and units in the OSA model. Of particular note for phase 1:
 - i. To determine a name for the 'HelpDesk'
 - ii. To determine a name for 'Customer Services'
 - iii. To consider the conventions around how to define and name student roles throughout their lifecycle (i.e. student, customer, co-creator, developing professional etc.).
- b. Of particular note for Phase 2 (but not limited to):
 - i. The Priority Group Centre of Excellence

6. Task Force

- a. Establishment of a task force to assist with managing transition and implementation. The purpose will be to troubleshoot and identify teething problems to minimise disruption to BAU and student experience.
- b. This is an interim measure until phase 2 sees the General Manager Benefit Realisation put in place.

7. International Admissions

- a. International remain in scope for Phase three. However until then we will put in place an interim solution to manage the Application to Enrolment process.
- b. This will include dedicated International Student Administration support. This position will embed and administer the new admissions process for International.
- c. This will be a change to staff as the current *Student Administrator International* is to be transferred to International until Phase three.

8. Increased Stakeholder Engagement

- a. Undertake a greater level of stakeholder engagement to further develop the OSA model Phase Two components.
- b. The detailed outline of this can be found in section 7 below.

9. Sector Alignment Interface

- a. An overview of the interface between Sector Alignment and Service Blueprint and any changes or implications arising from this are outlined in detail in section 4 above.

10. IMS Helpdesk

- a. There has been recognition of the significant role the IMS Helpdesk plays in supporting staff and providing services that are in addition to normal student IT requirements. Following a detailed due diligence of the type of support the IMS Helpdesk provides it has been determined that these activities are still in scope for the Customer Services function that will be outsourced to Concentrix.
- b. Feedback suggested that there is a need to have an increased IMS presence supporting the new learning and teaching spaces, as well as the need to ensure a strong interface between IMS and the new Customer Services team.

Confirmation of the new BLUEPRINT operating model

1) Decisions regarding OSA model and implementation phasing

- a) It is decided that the Organisational, Social and Academic (OSA) model will be implemented.
- b) It is decided that implementation will take place across three phases.
 - i) Phase One transition and implementation will begin from mid November 2015 with a Go Live date of 1 April 2016. Reference section 6 for a high level implementation plan.
 - ii) Phase Two development will also start in mid November 2015. Refer to section 7 for more detail about how stakeholders will be involved in this.

2) Decisions regarding Customer Services and Outsourcing (Phase 1)

- a) It is decided that Customer Services will be implemented at Phase One
 - i) The future state Customer Services is explained in section 6. Apart from the ORM function being assigned to prospective students at application (rather than enrolled students upon enrolment), there are no other material changes to what was outlined in the Proposal for Change. The Customer Services function replaces most of the current Student Administration (except for Student Finance and graduation), Student Central and IMS Help Desk. Details of roles impacted are in section 8
- b) It is decided that the Customer Services will be outsourced to Concentrix.
- c) The outsourcing agreement with Concentrix will be through a **master service agreement (MSA)** that will define the terms that will provide the umbrella terms and conditions that will govern the contractual agreement. The term of the MSA is for a 5 year agreement for Concentrix to provide the scope of services for Unitec outlined in appendix B of this memo.

The services will be delivered by Concentrix through;

- Resourcing a Contact Centre providing front and back office services in partnership with Unitec, on campus at Mt. Albert, Auckland
- Implementing Concentrix's Community Model that will leverage both full time and casual employees. Casual employees to primarily consist of Unitec students where reasonably practical. This will form a flexible delivery model to allow for a flexible delivery model to handle high or low volumes.
- Staff Unitec's student "Frontline customer services" at each of the three work locations (Mt Albert, Northern and Waitakere campuses).
- Establishing a team to build and maintain a KMS in support of the Customer Service activities and Concentrix's staff supporting Unitec.
- Implementing the Concentrix Engineered Design for Global Excellence ("EDGE") program to identify and execute service improvement for both operations and processes.

3) Phase Two Development

- a) **Key Consideration for Phase Two:** Feedback received during consultation for phase 1 and the OSA model was that stakeholders wish to be involved more comprehensively throughout the development, planning, and implementation of the OSA model. This has been noted and consequently the practice for the future will be an increased level of stakeholder involvement.
- b) **Stakeholder Engagement:** We recognise the importance of a broader, more integrated approach to external stakeholder engagement. We are in the process of identifying and developing key strategic long-term relationships that are critical for the success of our transformation, particularly in regard to the development of the phase 2 components of the OSA model. Feedback has also indicated a greater need to adhere to, and to make explicit, how the principles of Te Noho Kotahitanga are embedded throughout the model.
- c) **Stakeholder engagement objectives for Phase 2:**
- Identify key stakeholders with an interest in the change and undertake an assessment in collaboration with them to identify areas of interest and opportunities for involvement;
 - Develop a clear Communication and Engagement Plan based on our Change Management Principles and the outputs of the Stakeholder Assessment. We will aim to create optimal opportunities for dialogue about the future state while meeting the needs of the stakeholders involved. Clear metrics will be assigned to measure the impact of engagement and communications on the success of the change; and
 - Measure and evaluate the outcomes of communication and engagement activity.

Financial Case

The financial case for the Student Services Blueprint are summarised in the table below:

Figures represented are in \$000's.

Parameter	Phase 1	Phase 2 Indicative	Phase 3 Indicative
Baseline Operational Costs (2015 Status Quo)			
Operational savings to Unitec			
	Per annum*	Per annum**	Per annum***
Redundancy (operational cost)		**	***
Transition (operational cost)			
Implementation (Capital cost)			Not Applicable

*Note this is an annualised saving.

**Phase 2 Costs are still subject to detailed impacted analysis and outcome from proposal of change process.

*** Phase 3 Costs are still subject to detailed impacted analysis and outcome from proposal of change process.

For the period of 2016 financial year 2016 (FY16) we will incur some costs of the old structure until the new structure is fully established with the impact on the ability to realise the full value of the savings in FY16.

The detailed operational cost analysis for the period is provided in appendix A of this memo. This includes the comparison business case financials of the Outcome document to the Programme Business Case and the Proposal for Change. The financials are also presented as an Operational Cashflow for 5 year period from 2015 to 2020.

Plan to outcome release

The table below outlines the key activities to manage the release of the Outcome document.

Internal communications (staff and students)

1. Prior to release date

- Continue transactional communications with staff and students relating to the change projects (key actions and dates).
- Any changes to release dates need to be communicated to all staff as soon as they are known.
- The main 'institutional' visibility of Unitec for staff in this period is the Staff Awards nominations, and we have deliberately set this campaign around student outcomes and our brand values, rather than giving it an organisational change focus and shifted key dates away from key dates around change projects.
- Ongoing conversation with Student President; written briefing document and verbal briefing for President and Maori and Pacific student representatives the day preceding the release date.
- Invitations to presentations for impacted staff to be sent out at the start of the release date week.

2. Release date

- Presentations to impacted staff for both change projects.
- Email communications with all staff and with staff specifically affected by the two change projects.
- Email to all students and updates of Moodle page.

External communications

3. Lead up to release date

Our external communications approach in the lead up to the release date will be very similar to the approach we took for the Proposals for Change.

- Continue to push out proof point stories which will also be shared on our website and social media.
- Remind key education reporters of the upcoming release date.
- Send written briefings to key stakeholders including Minister Joyce, MPs, TEC and NZQA, and provide verbal briefings for other key stakeholders including IBM and Concentrix. Please note that Union briefings will be undertaken on Nov 6th.
- Remind discipline regulatory bodies and give them a heads up that the change is happening.
- Prepare a media statement to be released to education reporters on Nov 6 with a 5pm embargo to allow for all affected staff to be notified.
- Prepare a social media response plan.
- Develop concise key messages around key risk areas for post release media. Update message maps.
- Brief CE, ELT and Council on risks and key messages.

4. Release date

- Send out embargoed media statement at midday (5pm embargo).
- Handle media enquiries.
- Set up interviews for Rick.
- Monitor media and social media coverage.

- If necessary implement social media response plan.

5. INTERNAL AND EXTERNAL COMMUNICATIONS Post-release

- Assess and identify new risks/threats/opportunities.
- Continue to monitor media and social media.
- Monitor staff response via engagement with formal channels/events.
- Ongoing handling of media enquiries.

We need to be aware of and ready to respond to new risks in the post decision environment. The main mitigation will be the development of robust key messages for the CE, ELT and Council and a willingness to engage with the media. Two further mitigations to support stakeholder relationships will include reconnecting with accreditation bodies and a Christmas function with key stakeholders.

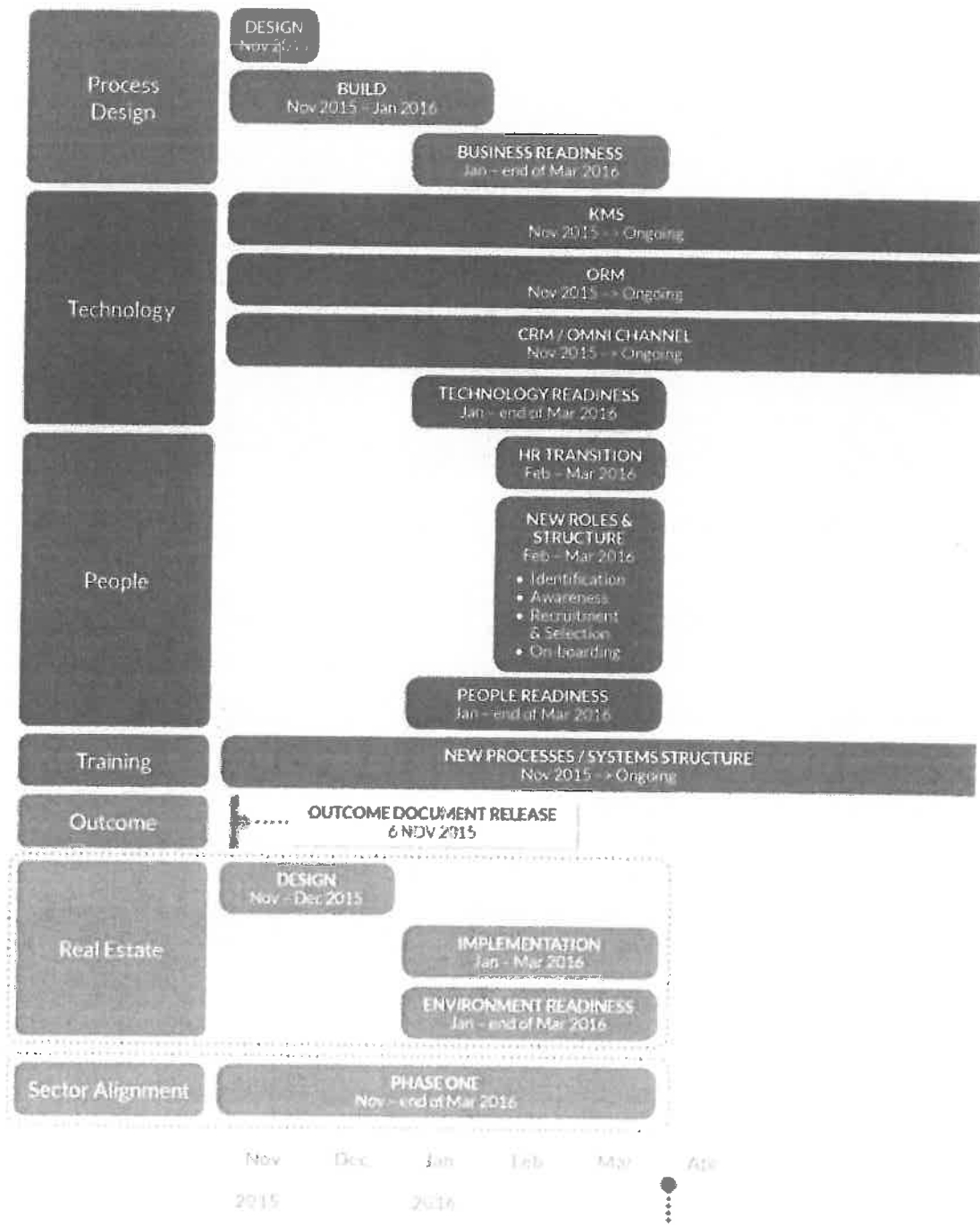
Student Services Implementation Plan

The plan is to set out the approach and timeline for managing the implementation of the structural changes arising from this Outcome Document. The plan covers:

- Management of staff surplus
- Redeployment for ring-fenced positions
- Recruitment and selection for new positions/roles
- Transition to new structure

The timing of the key stages for phase 1 are outlined below.

Unitec Transformation: Student Services Blueprint Phase One Implementation Timeline



KMS - Knowledge Management System
 CRM - Customer Relationship Management
 ORM - Online Request Management
 GO LIVE 1 APR 2016

Appendix B: Customer Services scope for Concentrix

- a. Single point of contact for student queries.
- b. Ensure seamless interactions by providing warm handovers (connections) to specialists.
- c. Reduce risk of disengagement of students through proactive anticipation of need and pre-emptive outreach.
- d. Enhance development of customer profile by capturing all engagement activity.
- e. Filter and tailor push notifications to ensure tailoring and relevance of communications to students.
- f. Proactive outreach to engage and support prospective students during enquiries to application and enrolment.
- g. Allocating and introducing ORMs
- h. Issuing students with a digital student ID and welcome pack
- i. Proactively contacting students to check if study ready
- j. Responding to escalated admissions enquiries
- k. Manage service catalogue
- l. Manage service requests
- m. Manage incidents
- n. Manage Priority 1 incidents
- o. Communicating with customers via their preferred channel

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- Staff Unitec's student "Frontline customer services" at each of the three work locations (Mt Albert, Northern and Waitakere campuses).
- Establish a team to build and maintain a KMS in support of the Customer Service activities and Concentrix's staff supporting Unitec.
- Implement the Concentrix Engineered Design for Global Excellence ("EDGE") program to identify and execute service improvement for both operations and processes.

Customer Services Relationship Managers		
Description	Channels	Functions
<ul style="list-style-type: none"> • Online Relationship Managers (ORMs) Generalists • Help desk Generalists • Admissions Specialists 	<ul style="list-style-type: none"> • Unitec Portal • Unitec App • Phone • Email • Live online chat • Face to face at all three campuses (with extended hours) 	<ul style="list-style-type: none"> • Allocating and introducing ORMs • Issuing students with a digital student ID and welcome pack • Proactively contacting students to check if study ready • All incoming tier one query resolution from enquiry onwards • Escalation/warm handovers when necessary to all tier two specialists. • Proactive outreach and notification. • Filtering and pushing out tailored communications. • Capturing customer engagement in CRM to enhance student profiling • Communicating with customers via their preferred channel • Manage service catalogue • Manage service requests • Manage incidents • Manage Priority 1 incidents • Resolution of tier 2 queries relating to admissions