Student Services Blueprint

Redesign... and revitalise to deliver a better answer that works in a new way.

Rethink... to create a new angle and perspective.

Relook... to better understand the dynamics and opportunities.

Proposal for Change

Overview of this document

Section	Description
Section One	Overview of Proposal and Staged Implementation • What are we consulting with you about? • Who is in scope? • How to give feedback or asks questions.
Section Two	Introduction and Background • Summarises why we are changing and how we got to this point. • Includes graphics that outline our key drivers for change.
Section Three	The proposed new model • An overview of how we arrived at this model and what its key functions are. • Describes the different teams and their purpose and place in the model. • Highlights the key transformations.
Section Four	Proposed Changes • Details the proposed change. • Outlines who is impacted and what the options are.
Section Five	Consultation Process • Overview of how this process will work • Cut-off date for feedback • What support is available
Appendices	A: Student Life Cycle B: Library Convergence C: Current and Proposed Org Structures

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SECTION ONE
Overview of Proposal and Staged Implementation

In this section:

1. *What are we consulting with you on?*
2. *Phasing of Implementation*
3. *Services in Scope*
4. *How to give feedback and ask questions*

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What are we consulting with you on?

This document presents the overall proposed future state Student Service model, including a three phased approach to implementation.

It is proposed that in Phase One, Customer Services (Student Administration, Student Central and IMS Help Desk), are outsourced to Concentrix, our on-site business and academic partner.

We would like your feedback on two things:

- The overall Student Services Blueprint model as described in this document
- Phase One (as described above) of the model

Phasing of Implementation

This is a significant and complex implementation and to ensure that the implementation is effective so that Unitec is properly enabled to adopt and successfully use the new processes and systems for the benefit of our students, the full implementation will take place over three phases.

Phase One
- Phase One proposes the outsourcing of selected functions and concentrates on developing Customer Services
- Aiming for Go Live on April 2016.

Phase Two
- Phase Two extends the structure, processes and systems to create the remainder of the model:
- Student Life,
- Student Achievement,
- Benefits Realisation,
- Priority Group Centre of Excellence.
- Aiming for Go Live on June 2016

Phase Three
- Phase Three will look to extend the functions covered, to include Library and International
- The end result being fully converged student Service functions across Unitec.
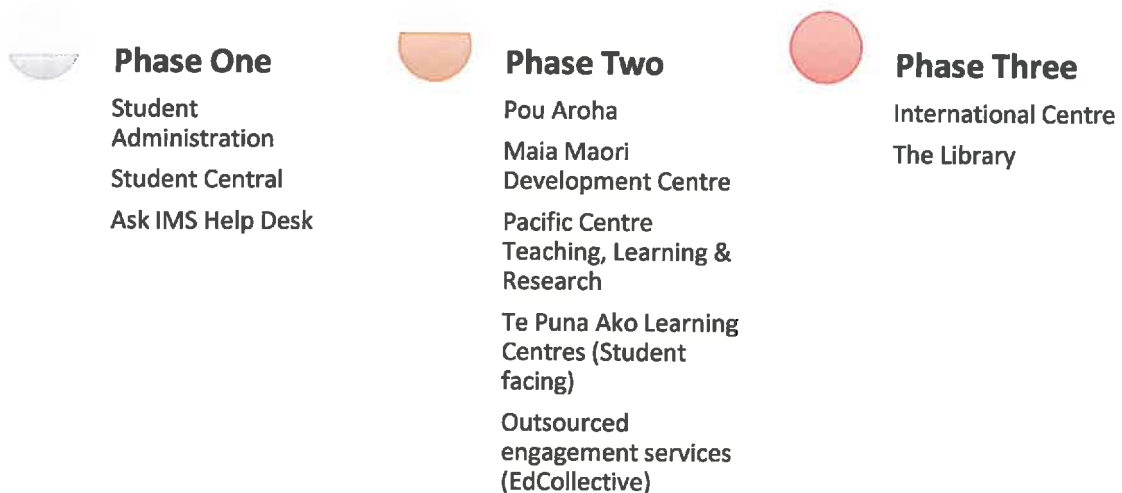- Aiming for Go Live on Jan 2017

Services in Scope for the Final Service Model

The scope includes student services currently being delivered at Unitec.

Student Administration	Unitec Activities In Scope	Out of Scope
•Student Central •Ask IMS Help Desk •Maia Māori Development Centre •Pacific Learning and Teaching Centre •Pou Aroha – Student Wellbeing •Te Puna Ako Learning Centre (Student facing services only) •Contracted Engagement Services (Ed Collective) •International •Library	•How services support student recruitment and admissions •How services support the process of teaching and learning •How services support student employment and work readiness •How services support or enhance pastoral care	•Marae operations •Sports, childhood centre, copy centres •The Village •Onsite food and beverage outlets •Veterinary and osteopathy clinics •Stores in the Hub (book, hairdressing, convenience) •Banks and ATMs •Unitec corporate services

Services in scope by phase

Phase One

Student Administration

Student Central

Ask IMS Help Desk

Phase Two

Pou Aroha

Maia Maori Development Centre

Pacific Centre Teaching, Learning & Research

Te Puna Ako Learning Centres (Student facing)

Outsourced engagement services (EdCollective)

Phase Three

International Centre

The Library

How to give feedback and ask questions?

We've released this Proposal for Change, so that you can understand what's happening, and make comments and suggestions on the proposed structure. For further information on our feedback process and timeline please refer to pages 49-51.

SECTION TWO
Introduction and background

In this section:
1. *Introduction*
2. *Our Challenges*
3. *Our Change Process*
4. *Whakapapa of the Proposed New Service Model (The Journey so far)*
5. *Acknowledgments*

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Introduction

Unitec aspires to be a world leader in contemporary, applied learning and an agent of positive economic and social change. We want to enable better futures for students, communities, public and private enterprise. We will to do this by offering our learners an experience that is personal, accessible, real and transformative. We will make a significant contribution to Auckland and New Zealand with high quality graduates who make a real difference in our industries and communities. We will also make a difference to professional and vocational work and practice through applied research that has impact.

As the largest institute of technology in New Zealand we have around 19,000 students each year who choose us for their higher education. Since we formed in 1976 we have enabled hundreds of thousands of students to get great jobs and fulfilling careers.

The world of education is changing and simply continuing to do what we do today is no longer an option.

Our challenges

As an institution we are facing a number of specific challenges to our current operating model.

These include;

- Falling enrolment numbers caused by an increasingly buoyant economy.
- Falling income in real terms from government funding and high, inflexible fixed costs.
- Areas of outdated educational delivery which undermine the relevance and effectiveness of our programmes.
- A property portfolio that has high seismic risks, is inflexible for contemporary educational purposes and unsuitable for modern technology, as well as imposing an unsustainable financial burden on the organisation.
- Technology, systems and processes that are unable to meet the needs of today's learners and require significant investment.
- A historic way of working and organising ourselves that is inflexible and unsuited to the delivery of our new learning and teaching approaches.

These challenges are set against significant disruption in education globally as technology continues to have an unprecedented impact on how we access information and how we learn. The plethora of free online courses and new teaching and learning models are just two examples of how technology is disrupting traditional approaches to education. Students are now able to learn online in their own time and technology is being used to make face-to-face learning highly engaging, collaborative and team-based. At the same time technology is also changing the way we work together creating efficiencies and fostering new ways of working.

At the same time, the expectations of governments, students and employers are changing. Our students want value for money. They are seeking qualifications that will prepare them well for the world of work they enter; they want to be highly employable with qualifications that are well connected with, and recognised by, industries and communities. Governments are also seeking value and relevance from tertiary education providers. In New Zealand, this translates into graduates who can add value to industries and communities, and who can contribute to the success of our key employers; following the global financial crisis, employers are seeking graduates who can add immediate value to their workplaces. Alongside technical expertise, they're also looking for soft skills, such as team work, a strong work ethic, high levels of communication and the ability to work collaboratively across multiple dimensions.

At Unitec we are responding to these changes by reshaping our organisation through transformation. At the core of our transformation is a commitment to providing world-class, technology-enabled learning and teaching opportunities that are aligned with industry, ensuring our graduates have the skills, capabilities and attitudes required to meet the changing needs of the workplace. To support our new learning and teaching models we also need to create new spaces for our students to learn and work, reshape and converge the services we provide, and drastically upgrade our technology.

Our change process

Unitec's change model uses a continuous improvement cycle that involves three stages: relook, rethink, redesign. A Relook will normally involve a current state assessment or stock take that may include independent research, market analysis and benchmarking.

Where a Relook identifies opportunities beyond improvements to 'business as usual', a Rethink may be undertaken to develop a change proposal for consideration. A Redesign occurs when the nature of a required change has been established.

Over the last few years we have been utilising this continuous improvement cycle as we begin to move towards our aspirations for the student experience. These include a number of areas that have paved the way for this proposal for change, including:

- The IMS relook, rethink and redesign and resulting IMS Technology Strategy
- The establishment of our student central centers as physical one stop shops.
- The Student Life Cycle project
- The redesign or our library services to see service and operational changes and a reframed workforce
- The development of the First Six Weeks projects which brought stronger alignment of activities over a student's first six weeks at Unitec
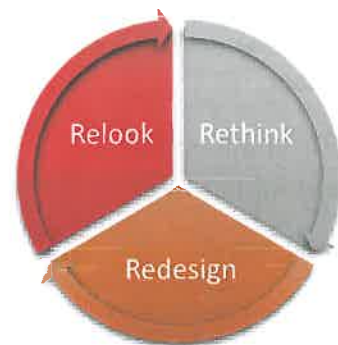
Whakapapa of the Proposed New Service Model (The Journey So Far)

Significant work has been undertaken since 2009 on how we can assist our students in achieving their potential and getting the most value out of their time with us. Projects such as The Student Life Cycle Project became a catalyst for a broad range of student focused projects such as the First Six Weeks Experience Project, the Māori Success Strategy and the Alumni Strategy (for a more detailed overview of the Student Life Cycle please refer to Appendix (A). While significant progress has been made in this area there is still much to do.

In 2012, as part of a wider strategic framework, significant work was undertaken to reconceptualise our services. This initiative incorporated the ambition to enhance the student experience, and also aimed to achieve economies of scale resulting in highly efficient and quality services.

The first major service area to undergo change was IT services, which lead in 2012 to the establishment of Information Management Services (IMS) and a new Unitec Technology Strategy. The commitment to improving our technology platforms was a contributing factor that opened up opportunities to reconceptualise student services. This, combined with a significant amount of student and staff

feedback led to the development of *Student Services at Unitec; A Blueprint for 2017* (To read this document please <mark>click here</mark>).

Relook: Student Services at Unitec; a Blueprint for 2017

The Student Services at Unitec; a Blueprint for 2017 was developed as a road-map for the further development of existing student support services, aligned to Unitec's strategic direction. It brought together international trends in service provision, Unitec research findings and student feedback into one cohesive vision for Unitec student services. The Blueprint led to the development of this Proposal for Change.

Student feedback over the last 6 years has been steadfastly constant. In their own words we are 'disorganised' and 'inconsistent'. This feedback was first noted in the Student Life Cycle Project in 2009 and continues to this day through the Net Promoter Score (NPS) comments.

Many models of student services in the tertiary education industry are founded on a tradition of service professionals providing a specialised face-to-face, one-to-one, appointment-based service to individual students based on campus. Many are also predicated on the practice of catering to relatively small numbers of 'high need' users and are usually undertaken in units separate from the core business learning activity. This model is still widely practiced today, including at Unitec, but it now poses significant challenges as the economic environment, government priorities, educational landscape and student expectations all change around us.

We're not alone in grappling with these challenges; many western educational institutes are considering the same issues and responding accordingly. Some of the key drivers of change are outlined here:

Driver	Change Required
Government funding is based on a higher demand for accountability and performance targets, especially for priority groups.	Greater accountability for how we spend service fees. Greater demand to achieve target outcomes.
Reliance on government funding means we're still prey to the fluctuations of the economic environment.	Greater imperative to improve our conversion rates. Greater need to ensure our student experience is consistent with their expectations.
As a business, we're emphasising the need for each business unit to demonstrate how it is contributing to strategic outcomes.	Greater emphasis on shared objectives and measuring impact. Greater need to reduce inefficient business practices.
Greater numbers of our students are not 'traditional' – indeed the diversity of the student body is now so varied that most 'one-size-fits-all' approaches are quickly becoming obsolete.	Greater need to provide services that can be tailored, personalised, and engaged with in ways that are meaningful to the end users.
The ubiquitous presence of technology in all facets of our life has quickly produced an expectation that this same convenience will be present in educational endeavours.	Greater necessity to provide students with self-help and automated options that complement specialist services.
The backroom and business intelligence functions that can be realised via correct	Greater need to centralise processes and capture useful data that can help us make informed business decisions.

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technology platforms are now essential to
contemporary business practice.

To maintain our relevancy and help students achieve success, we need to evolve and respond to changes. Traditional service models have worked well for many years but now we are finding that some aspects of those traditional models are limiting our impact. The tertiary education sector continues to be highly competitive and so we are faced with the stark reality that there is little choice but to change what we do.

Over the last few years, there have been a number of refinements of our services across the institution – with a strong focus on improving the student experience. We've had some wins and seen some improvements that have been championed by service staff. The Services Blueprint Proposal for Change builds on this momentum.

Rethink: Concept Development and Consideration

Following the Library Redesign in 2014 the Blueprint project was started to consider the wider implications of the student services relook (for further information on the convergence of Library services into the proposed model, please refer to Appendix (B)

Three teams of students and staff from across a range of Unitec student services worked together to develop three possible models for future student services. These three concept models were each based on a theme; the Kaupapa model, Flipped model and Library-centric model. The result of this work was then assessed by a design panel of internal and external experts (including students) with the feedback and results forming the basis for the wider blueprint model proposed in this document. For further details about these models please refer to Appendix (C).

Redesign: The Proposed Model

Undertaking the relook and redesign led to a range of design principles that were used to underpin the proposed service model presented in this document. The design principles had to meet both our customer critical requirements and our business critical requirements. These are illustrated in the graphics on the following pages.

However the most significant design principle to emerge was for future state services to be customer centric. Our working definition of customer centricity is:

The known and identified factors which make a positive difference to student experience and success take priority in planning, decision making, accountability, and continuous improvement.

Customer centricity is more than being friendly and polite to students, it is the organizing concept that underpins the new service model in terms of structure, function, accountability, purpose and process. In line with this, the new model is highly technology enabled, focused on success and achievement, easily accessible 24/7, proactive, and customisable. All processes are developed and mapped with the student experience in mind, and the nomenclature and phraseology of the services is focused on strengths, potential, success and achievement – all in keeping with student feedback. Details of the new model are presented in section three and in the appendices.

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Drivers for Change

How We're Enhancing the Student Experience

Customer Drivers:	Where We Are		Our Aim
1 A need for more proactive service provision	Poorly organised, feels like students are put last. *Unitec Student*	Unitec needs to work to ensure a consistent level of service is provided by all staff across all campuses. *Unitec Staff Member*	✓ Proactively contacted by and connected with their peers early on. ✓ Preemptive services that anticipate.
2 Technology-enabled services that support self-service	We don't want our study time to be invaded but we want to participate — technology should facilitate that. *Unitec Student*	We're not talking to each other which prevents us from being able to access a wealth of important business information. *Unitec Staff Member*	✓ Information is easy to access, available 24/7 and on a device of their own choosing. ✓ To increase access, reach and options available for students.
3 The desire for connections between peers	One of my most important things here is my friends. It helps me feel at home, they are good for advice. Its very daunting and overwhelming when you first come here, so its awesome to have friends. *Unitec Student*	A buddy system upfront and in your face – getting those early connections. *Unitec Staff Member*	✓ To enable early upfront connections. ✓ To enhance student's sense of belonging.
4 The desire for targeted services, not one-size fits all	The staff aren't flexible to address diversity of culture, learning styles and stages of life. *Unitec Student*	Students have no concept of which Division (i.e. Learning Support Services, Student Administration Services) people belong to. What they should see from the user-side is products that they can use. *Unitec Staff Member*	✓ Timely, tailored and personalised communications to all students. ✓ To enable flexible service provision that can be personalised by students.

Figure 1 Customer Centric Drivers for Change

Business Drivers:

	Where We Are	Our Aim

5 — Improving Conversions

Where We Are:
- Unacceptable time variations for application processing
- No systematic Enquiry Management Process.
- Difficult application form.

Our Aim:
- ✓ All applications processed in timely manner.
- ✓ Customer centric admissions process.
- ✓ Oversight of whole process.

6 — Business Intelligence

Where We Are:
- No centralised data collection.
- No oversight.
- Difficult to demonstrate value and impact.

Our Aim:
- ✓ Dashboards of useful data sets that enable informed decision making.

7 — Shared Ways of Working

Where We Are:
- Siloed operations.
- Collective impact is stymied.
- Competing or divergent priorities.

Our Aim:
- ✓ Flexibility and agility to respond.
- ✓ Extended reach and impact.

8 — Streamlining Resource Allocation

Where We Are:
- Duplication of resources.
- No flexibility to deploy current resource where most needed.
- Inconsistent and variant processes.

Our Aim:
- ✓ Deployment of staff where/when required.
- ✓ Efficient and effective processes.

Figure 2 Business Centric Drivers for Change

Acknowledgements

The model presented here is not a 'tweak' or an incremental improvement, it is a significant transformation. We have reconceptualised a service model from the ground up. Undertaking an ambitious project of this nature takes a massive amount of time and input from a wide variety of people and here in this section we would like to acknowledge and thank the generous contributions of all the people who helped bring this model and this proposal to this point.

Thank you for contributing your time, ideas and energy, and to the many staff who also demonstrated a brave willingness to consider and develop ideas that may have direct impact on their role or their team members – thank you also. Your passion for improving the student experience and helping us become more customer centric is exemplary.

In particular we would like to acknowledge the design work of the Kaupapa concept team, the Flipped concept team and the Library-centric concept team. Your work has directly contributed to the development of the model presented here. (For a full overview of these teams and how their work has been incorporated into the model please see appendix (C)).

We would also like to thank the many people from across all areas of Unitec who got involved in some way in this project. A full list of people and their contribution is included in appendix (D).

SECTION THREE
Overview of Proposed New Service Model

In this section:

1. *Service model future state Outcomes Framework*
2. *Description of proposed model: OSA – Organisational, Social, Academic*
3. *Basis of the Structure of the proposed model*
4. *Overview of Team Purpose and Functions in the proposed model*
5. *Overview of the Key Points of Transformation in the proposed new model*
6. *Three key differentiators of the proposed new model:*
   a. *Guiding Coalition,*
   b. *Online Relationship Management,*
   c. *Priority Groups Centre of Excellence*
7. *Potential Outsourced component of proposed new model*
8. *Background to considering outsourcing as an option*

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Services Outcomes Framework

Our Purpose	Creating the conditions that simplify joining the Unitec community, and remaining with the Unitec community. We do this through creating the conditions in which each student can achieve their learning and career goals, develop meaningful relationships and enhance their sense of wellbeing.			
Strategic Intent	**3 year Objectives**		**Outcomes we expect to see**	**Metrics to show our success***
To bolster acquisition (conversion) and retention To bolster employment outcomes To enhance student pride and sense of belonging To enhance student willingness to recommend To boost all the above metrics specifically for priority group students To operate a service that meets agreed financial targets	People	Easy for students to become part of the whanau	• Increased participation across all segments • Greater choices for students • Services available at times that suit students • Students better prepared, retained, successful • Enhanced employability in a diverse employment market • Proud professional workforce • Students co-deliver services • Greater sense of belonging and better R&S outcomes • Unitec's reputation as inclusive institute increased/recognised • All students feel good about Unitec • Staff satisfaction increases • All information needed for decision making is easy to get (with as little waiting and minimal touchpoints as possible) • User friendly self-service frees students to access from anywhere anytime • Relevant measures and living data tells processes owners the effectiveness of their processes (and enables a faster response) • We know how much it costs to attract, retain or lose a student. • We measure and review the impact of all services we provide, and continuously explore alternatives.	Rate of self-help utilisation (prospective) Conversion rates from enquiry to enrolment Participation, retention, completion and transition Number of students optimised with scholarships First term retention (across first 8-10 weeks) Student pride and sense of belonging Student willingness to recommend Staff pride and sense of belonging Staff participation in Professional Development National/ international ranking against other ITPs Rate of 'wrong course' withdrawal (% decrease) Student employment within Unitec Graduate employment rates Intern and apprenticeship rates Rate of utilisation of ORMs (query count) Rate of self-help utilisation (enroled) Use of peer assisted resources % of customer queries solved at first port of call Acceptance rate after auto invite to events issued Number of staff involved per query/task Processing and response times Progressive increase documented and centralised processes/info Operational efficiency savings across all processes Efficiency gains over 3 year period
		Flexible service options to suit diversity (tailoring, segmentation)		
		Consistent gold standard service experience for all		
		Service culture based on TNK that is professional, current, responsive		
		Improved 'employability' status and outcomes		
	Process	Converged service provision with shared objectives and KPIs		
		End to end oversight of process		
		Data informed decision making enables proactive and pre-emptive service		
		Student centric processes make sense		
	Tech	Unified banks of knowledge (KMS, CRM)		
		State of the art technology enables process, service and analytics		
	Business	Service fee gets maximum bang for buck (reach and impact)		
		Efficiencies through automation of common process and self-help		
		Efficiencies through reduction of duplication		
		Flexibility of model to accommodate change and continuously improve		

*Assume all metrics relating to students will be further disaggregated to show data for Under 25s, Māori, PI, International, Migrant, and students with disabilities (and any other appropriate segments as decided).

Description of ORGANISATIONAL, SOCIAL and ACADEMIC [OSA] Service Model

At the philosophical paradigm level, this service model departs from the traditional model most often found in tertiary settings, and is not positioned on a 'risk' praxis with 'support' based services that speak to student 'deficiency' and 'need'. It is instead concerned with achievement and success and speaks to the competency and agency of both the student users and the staff who will bring the model to life. As such, in the final model, all nomenclature and communications will reflect this strengths based approach.

The [OSA] model (the model) is a contemporary, customer centric, technology enabled service model, and has been developed to meet both our customer critical requirements and our business critical requirements (as per graphic below). The model converges[1] and integrates[2] previously separate service units and remodels the functionality of those units into new processes within a new structure. As such, there are no longer individual service units within the model, but a flexible and deployable team of generalists and specialists who work collectively to achieve shared objectives (as shown in the Outcomes Framework on page 17).

Customer Critical Requirements	Business Critical Requirements
•Real time	•Extend reach, improve impact
•Options & flexibility	•Centralisation and oversight from end to end
•Personalisation	•Demonstrable value and impact
•Diversity	•Efficiency, reduction of duplications
•Single point of contact	•Bolster conversions, retention
•Consistency of service standard	•Flexibility and agility

The model's organisational structure is based on an organisational, social and academic framework, explained further in this section. However the organising principle for all services is the student life cycle. Processes are mapped to reflect this, service teams are clustered to maximise impact along the life cycle, and resource can be deployed to match life cycle peaks and troughs in student activity.

In addition to converging and reframing existing services, the model offers a number of completely new services. The key points of transformation in the model will be explained further in this document with additional information to be found in the appendices.
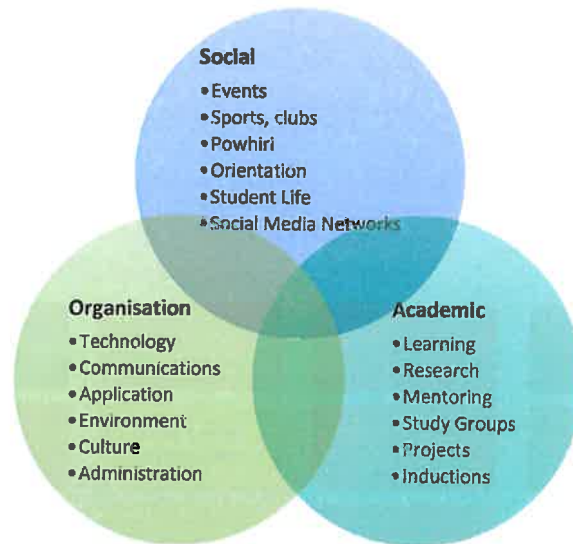
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[1] Convergence is the bringing together of previously separate services or functions into a unified and centralised process/structure/methodology. It is a frequently used term in IT speak but recently has also permeated the international tertiary sector.
[2] Integration is the management and delivery of services so that customers receive a continuum of responsive and proactive services according to their requirements and preferences across the life cycle.

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Basis for the Structure of Proposed New Service Model

The model combines two research findings as a basis for its organisational structure.

The first is from Zepke (2006[3]), who describes how students experience an institutional 'culture' via three domains; **socially**, **academically**, and **organisationally**.

Social
- Events
- Sports, clubs
- Powhiri
- Orientation
- Student Life
- Social Media Networks

Organisation
- Technology
- Communications
- Application
- Environment
- Culture
- Administration

Academic
- Learning
- Research
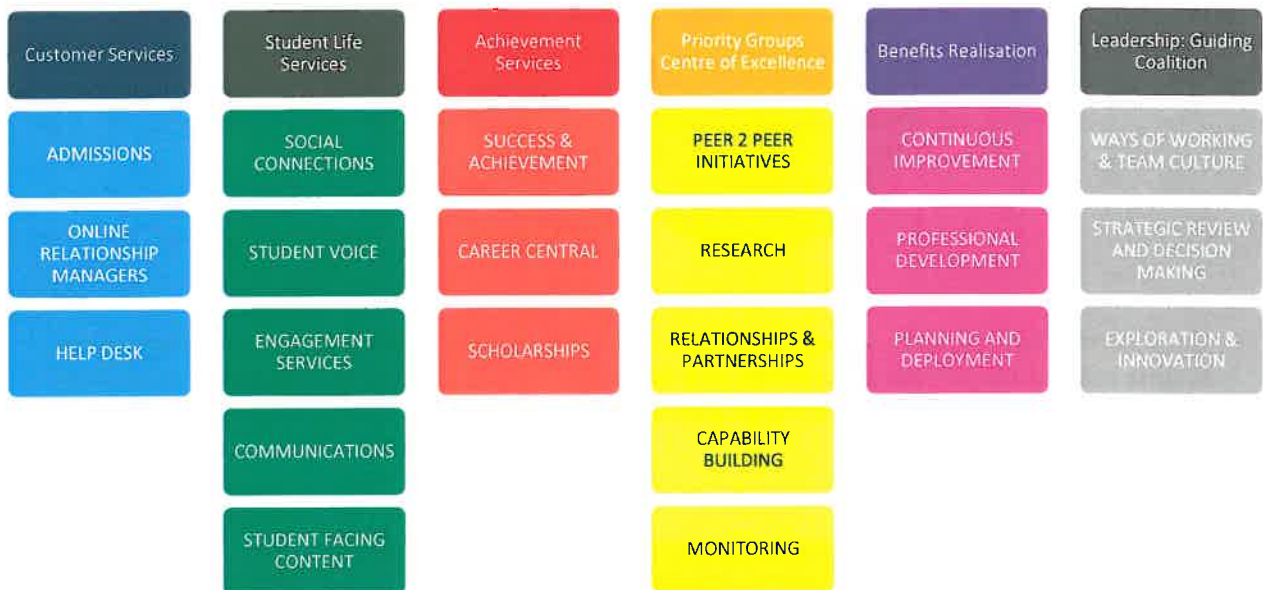- Mentoring
- Study Groups
- Projects
- Inductions

The second is from research undertaken in 2012 by Solomon, who found that student definitions of success centred around four core themes (see diagram below). These four themes were also strongly integrated into the original Flipped Design Concept.

Employment;
Getting a full time job, being employable, getting paid to do what you love, professional development

Having clear direction and achieving goals;
Having a clear idea of what you want and gaining some early successes

Success

Good relationships;
Building contacts/networks, and having good relationships with friends and family/whanau

Personal wellbeing;
Looking after yourself, being healthy, having a sense of wellbeing

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[3] Zepke, N., Leach, L., & Prebble, T. (2006). Being learner centred: One way to improve student retention? *Studies in Higher Education,31*(5), pp587-600.

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Functions of Proposed New Service Model

Customer Services	Student Life Services	Achievement Services	Priority Groups Centre of Excellence	Benefits Realisation	Leadership: Guiding Coalition
ADMISSIONS	SOCIAL CONNECTIONS	SUCCESS & ACHIEVEMENT	PEER 2 PEER INITIATIVES	CONTINUOUS IMPROVEMENT	WAYS OF WORKING & TEAM CULTURE
ONLINE RELATIONSHIP MANAGERS	STUDENT VOICE	CAREER CENTRAL	RESEARCH	PROFESSIONAL DEVELOPMENT	STRATEGIC REVIEW AND DECISION MAKING
HELP DESK	ENGAGEMENT SERVICES	SCHOLARSHIPS	RELATIONSHIPS & PARTNERSHIPS	PLANNING AND DEPLOYMENT	EXPLORATION & INNOVATION
	COMMUNICATIONS		CAPABILITY BUILDING		
	STUDENT FACING CONTENT		MONITORING		

THE MODEL – Overview of Team Purpose and Functions

Area	Purpose Overview	Key Functions
Customer Services	• Enable single point resolution by responding to queries • Ensure seamless interactions by providing warm handovers to specialists • Reduce risk through proactive anticipation of need and pre-emptive outreach • Enhance development of customer profile through capturing all engagement activity • Filter and tailor push notifications to ensure tailoring and relevance of message	Query Response Proactive outreach Hand overs CRM management Push notifications Application to enrolment
Student Life Services	• Optimise opportunities for student voice and involvement • Facilitate transition into student 'social & community life' • Provide specialist guidance to enhance student wellbeing • Provide proactive early outreach to enhance connections • Filter and manage enterprise level push-communications to ensure tailoring and relevance • Develop and oversee all student facing content to ensure brand consistency, relevance and currency • Develop and facilitate all student events to increase student belonging and pride • Enhance development of customer profile through capturing all engagement activity	Health and wellbeing Social Connections Student Engagement and Voice Communications Content development Event management
Achievement Services	• Optimise student decision making across the life cycle • Facilitate transition into student 'study life' • Provide specialist guidance to enhance student achievement • Monitor student engagements and pre-emptively intervene to prevent risk escalation • Provide specialist guidance to develop career competencies and enhance professional development • Develop career ecosystem and activate stakeholder networks • Boost scholarships impact • Enhance development of customer profile through capturing all engagement activity	Inductions Student Achievement Monitoring and interventions Professional Development Career Ecosystems Industry networks Scholarships

Priority Groups
Centre of Excellence
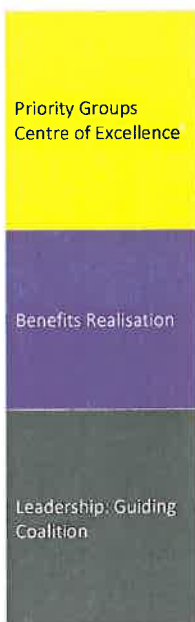
- Optimise all service staff capability to engage effectively with priority group students
- Facilitate collaborative research projects with internal and external stakeholders to maintain service currency to priority groups
- Monitor all student facing services, processes, content to ensure relevance to priority groups
- Lead the development of centralised peer to peer initiatives to enhance priority group outcomes
- Foster the development of partnerships and relationships at local, national, international levels

Research
Sharing good practice
Regulation and appraisal
Training and development
Relationship building
Peer to peer initiatives

Benefits Realisation

- Analyse cost to serve and service impact data to support business efficiencies
- Monitor shared and specific outcomes to ensure high performance teams
- Foster continuous improvement to ensure currency and high performance
- Forecast, plan and deploy staff to meet peaks and troughs of student life cycle
- Develop and train staff to ensure high level of professional consistent service
- Analysing system data to optimise processes, content, service levels, and outcomes.
- Ensuring users have access to comprehensive self-help resources

Performance and planning
Continuous improvement
Staff development
Workforce planning and deployment
Digital Resources

Leadership: Guiding Coalition

- Ensure collectivity across teams by establishing shared ways of working.
- Lead the review and development of the service objectives and metrics to maintain continuous improvement
- Ensure effective use of resources by managing, forecasting and monitoring annual operational budget
- Create a work culture that is inclusive, dynamic, collaborative and models principles of TNK/Unitec values
- Demonstrate value and impact to ELT through effective reporting
- Future proof service operations by leading exploration of ideas and innovation.

Ways of working
Team culture
Strategic Review
Financial Oversight
Reporting
Exploration

[4] *"A centre of excellence refers to a team, a shared facility or an entity that provides leadership, evangelization, best practices, research, support and/or training for a focus area" (Wikipedia).*
"A team of people that promote collaboration and using best practices around a specific focus area to drive business or customer-valued results" (Agile Elements)
It is envisaged that the Priority Groups Centre of Excellence will have considerably more status and impact than the current model is able to achieve.

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Key Points of Transformation in the Proposed Service Model

The table below summarises the key transformative components of the model and each component is set out in further detail in Appendix (E) further in this document. There are three critical differentiators, namely the Guiding Coalition, Online Relationship Management and Priority Groups Centre of Excellence, which are detailed in the following section.

Component	Purpose	Benefits	Place in Structure
1. **Resource Profile and Recruitment Matrix**	To ensure correct mix of capabilities and specialisms are recruited for, for all customer facing roles.	Adds value to service engagement with students, and supports the work of the Priority Groups Centre of Excellence.	Across all student facing roles.
2. **Priority Groups Centre of Excellence (PG COE)**	To raise staff capability across the entire service team. To be at the cutting edge of innovation and research. To raise the impact and responsiveness of services for priority group students.	Emphasises the status and value of priority groups. Increases appropriate responsiveness at all customer touchpoints. Discards deficit model in favour of strengths based approach/realising potential approach.	The PG COE Unit. Supports outcomes from the top down as well as across the model. [Whereas the recruitment matrix will ensure support for outcomes from the bottom up].
3. **F.A.S.T Model (Functionally Agile Service Transaction)**	To complement the human service with technology enabled service. To provide necessary BI (Business Intelligence). To build useful and meaningful student profiles that enable greater customisation.	Multiple benefits but key is the ability for technology to multiply the reach of services to 1000s of students, as opposed to 100s. Further benefits listed under description in appendix E.	Technology is critical to the model and sits behind entire structure. All processes are mapped with this design principle in mind.
4. **Online Relationship Managers (ORMs) & Help Desk (HD)**	To provide single point query resolution. To provide pre-emptive outreach. To filter and tailor communications. To capture all student engagement.	An entirely customer centric service. Convenience: available 24/7 from own device. Prevents irrelevant mass communications. An easy to find 'doorway' to all student services.	The team is called Customer Services in the structure. The ORM & HD are the conduit between students and all services.

Component	Purpose	Benefits	Place in Structure
5. **Admissions Centre**	To provide a simple, swift and seamless entry into study at Unitec. To automate and simplify the allocation of scholarships and other 'entry requirements'.	Greater conversions. Customer centric service that removes all barriers to enrolment. Has the greatest potential for diversifying revenue (e.g. future admissions centre for all of NZ).	Sits within Customer Services team, and works closely with PG COE, content advisors and other specialists, with a focus on acquisition.
6. **'Ways of Working'**	To create a working culture and environment that is proud, professional and responsive. To embed ways of working that are converged, customer centric and collective.	Staff feel supported. Efficiencies are realised. Productivity is enhanced. Customer service is consistently excellent.	Accountability lies with all management in the structure. It is their responsibility to model the ways of working as well as proactively develop and embed this. All processes are mapped with this design principle in mind.
7. **Shared Objectives/ KPIs & Collective Reporting**	To enable convergence. To guide effort in a focused manner. To embed customer centricity.	Clarity of purpose (eliminates divergent agendas) Greater collective impact. Easier to quantify and illustrate impact Greater efficiencies	Outcomes framework already shown in this document. Accountability lies with all managers and team leaders to drive this. All processes are mapped with this design principle in mind.
8. **Deployment of Flexible Teams**	To respond with agility to the changing demands across the student life cycle.	Always enough people to provide service at the time it is most needed. Encourages collectivity of effort. Staff have a high understanding of the whole picture. Increased number of students employed in frontline positions	Many customer facing roles have a 25% 'project based' component which enables their deployment as required. Responsibility for planning and forecasting sit in Benefits Realisation team.
9. **Engagement Services**	To enable rapid and appropriate outreach to students in order to pre-empt disengagement or heighten current engagement.	Minimises withdrawals Re-engages students who may have experienced disengagement. Raises student warmth towards Unitec.	Technology enables the 'alerts' and the ORMs have accountability for responding directly or escalating to appropriate specialist.

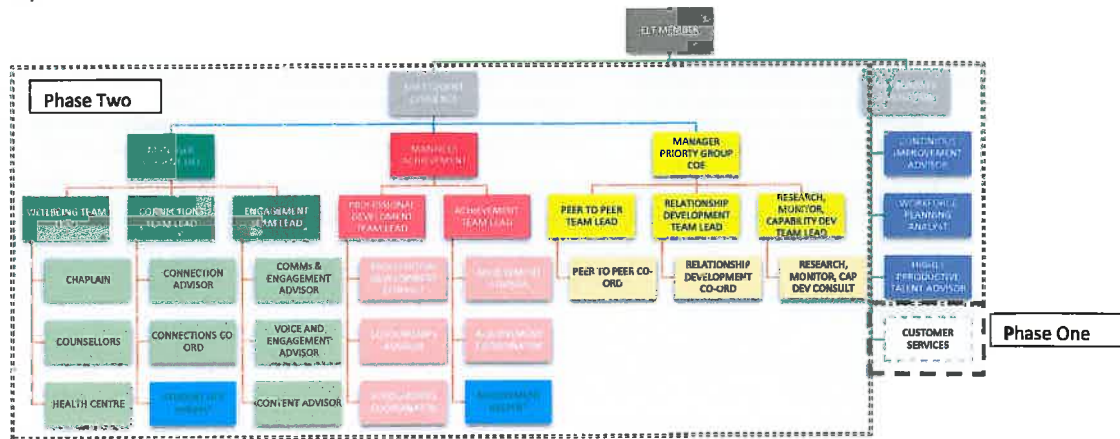| Component	Purpose	Benefits	Place in Structure
10. Career Central	Build meaningful connections through partnerships. Develop career communities that engage students, staff, alumni, industry and community.	Extended career development across life cycle. Greater alliance with teaching and learning. Activation of complex networks to connect stakeholders. Greater access and customisation for students. Whole institution becomes part of the 'ecosystem' that enhances employment outcomes.	Career Central sits in the Achievement team. Focus is across the entire life cycle with variances according to the phase.
11. Centralised oversight of processes, data, outcomes	Creates a process focus in Unitec services. To guide services and effort in a focused manner. Takes an end to end view of processes and services.	Creates a customer centric organisation and service through a process orientation. Greater collective impact to achieve outcomes. Easier to quantify and illustrate impact. Greater efficiencies. Supports the New Way of Working.	Supported by Benefits Realisation & PG COE teams, accountability lies with all managers and team leaders to champion this. All processes are mapped with this design principle in mind.
12. Supplementary transcripts	Provide a value add service by capturing appropriate and relevant information from students' extra-curricular activities at Unitec onto a supplementary transcript.	Provide students with a richer and more comprehensive profile that has interest to employers. Enhances students' career prospects.	Student Life Services will be responsible for delivering this service. Enabled by technology and supported by Engagement Services.
13. The Guiding Coalition	To provide converged and collaborative leadership across the entire service model.	Oversight of all components of the model. Collective decision making and setting of priorities. Prevention of siloed operations. Greater accountability.	The leader roles have accountability for modelling this style of leadership. It is embedded into new position descriptions as an accountability with specific KPIs.

Please note all names are working names only.

Three Key Differentiators of the Proposed New Model

The Guiding Coalition
Purpose: To provide converged and collaborative leadership across the entire service model.

One of the design characteristics of the model was to create an operating model that had a high level of convergence. Convergence requires a different style of leadership than the current operational model. Thus a key point of difference in the model is the idea of leadership who operate as a guiding coalition. The guiding coalition is made up of the General Managers and the Executive Leadership Team member.

The diagram below shows a traditional view of the organisational structure of leadership in the service model. Whilst this illustrates the new reporting lines it does **not** satisfactorily illustrate the new way of working that favours collectivity, collaboration and convergence. (NB: this chart shows types of roles - not the number of roles).

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Leaders of Services will still provide leadership and management in their area of accountability. However, GM positions will also work collectively with managers, in the spirit of a **guiding coalition** to deliver excellence in service that is highly responsive, proactive, customer centric, and achieves the desired outcomes. Working together as a coalition across the entire service model, the guiding coalition will ensure:

Strategy is translated into collective actions and priorities

Synergy across the service enterprise

Complexities are anticipated and reduced

Input, support and resource from across the organisation is gathered

Creativity and innovation are fostered;

'Ways of Working' are modelled and embedded

The diagram below attempts to illustrate how this might look, showing the idea of collective wrap around guidance to the entire service group that sits within.

This customer centric approach will enable Student Services to achieve common goals, creating a consistent and positive experience for students across the Lifecycle, enhancing student conversions, retention, and employability.

Unitec's transformation requires Unitec and its staff to consistently work together to enable the success of our students. This collaborative approach lies at the centre of all student service functions and role activities and these roles will therefore be responsible for normalising these shared ways of working.

The table below highlights some of the differences between traditional silo leadership and guiding coalition leaders

Traditional Silo Leadership	Guiding Coalition Leadership
Difficult for leaders and teams to get full oversight across the service units because processes are generally not connected	Processes are end-to-end and ensure that oversight is maintained across the service group
Communications between units can be cut off or difficult to maintain	Communication is centralised and planned across the group and focusses on shared ways of working and shared priorities.
Separate units can end up working to divergent objectives and priorities and this can make it harder for leaders and teams to measure their effectiveness	Objectives and priorities are decided collectively, resource allocated, and performance measured.
Resources are confined to the silo and not shareable	Resources can be shared and deployed according to need. There is a planned reduction of duplication.
Leaders and teams can feel isolated, unsupported and ineffective when trying to make changes	People are supported to work collectively on clearly defined and resourced priorities and common goals
Leaders can become enmeshed in reactive crisis management with insufficient time to develop, innovate, or collaborate	Leaders can find time to focus on opportunities, development and high performance
Team members may not get the opportunity to see or understand the bigger picture	Leaders share strategic intentions, information and priorities along with rationale
Despite best intentions and passionate committed teams, the student experience can still suffer because of the silo structures	The student experience forms the basis from which the structure, processes, objectives, and priorities are decided

Online Relationship Management (ORM)

Purpose: To provide single point query resolution.
To provide pre-emptive outreach.
To filter and tailor communications.
To capture all student engagement.

One of the key points of difference[5] in the new Unitec Services model is the concept of the ORM (Online Relationship Manager) and the Help Desk (HD). ORMs and HD are both in the same Customer Service team along with Admissions. The ORM and HD service is enabled through specific omni-channel technology that includes a KMS (Knowledge Management System)[6] and CRM (Customer Relationship Management System).

The Help Desk fields all queries from prospective students, visitors, and alumni. Current students can also continue to utilise the Help Desk. ORMs however are only for enrolled students.

The ORMs have five key functions:

1. Responding to incoming queries from enrolled students
2. Pre-emptively engaging with enrolled students
3. Tailoring and filtering enterprise level communications to students
4. Facilitating warm handovers to specialists where necessary
5. Capturing all engagement data in the CRM

It is anticipated that the ORM will become the primary port of call for the majority of student enquiries[7] **because the ORM is a single point of query resolution.** Irrespective of what the student asks, the ORM sources the answer and responds directly to the student. The aim is single point query resolution and this is in line with our student feedback. Only if the query requires tier 2 specialist intervention, or if the student requests it, will the ORM do a 'warm handover' to a specialist.

This service feature is both responsive and proactive; able to respond to direct student queries as well as anticipate needs and interests and act pre-emptively.

In addition to responding to queries, and undertaking proactive outreach, they will also be the channel through which all **enterprise level[8]** communications from Unitec to students will be pushed out. All communication to students will be managed and filtered and only relevant, tailored messages be pushed out based on student profile preferences.

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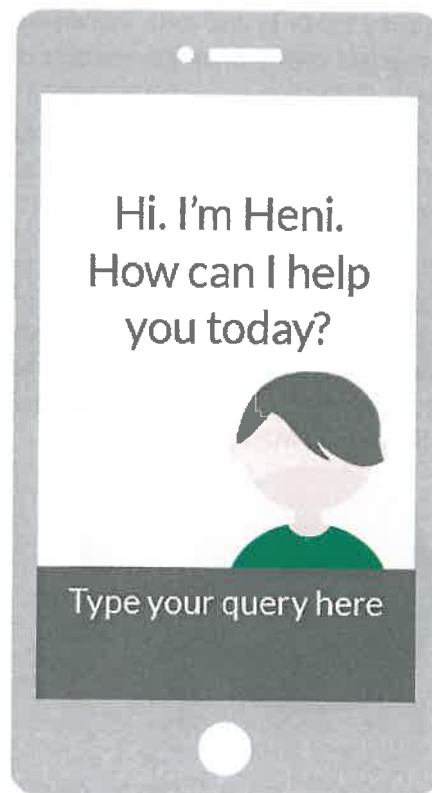
[5] A key point of difference from our current service model, as well as a key point of difference from our competitors.

[6] KMS – Knowledge Management System. This is a digital repository of all information and processes.

[7] Based on overseas research data. However this does not prevent students from maintaining contact with staff they already have a relationship with or utilising other channels.

[8] At the **local** level - lecturers, for example - would still be able (and encouraged) to maintain their own contact with their students.

Priority Groups Centre of Excellence (COE)

Purpose: To raise staff capability across the entire service team.
To be at the cutting edge of innovation and research.
To raise the impact and responsiveness of services for priority group students.

The model moves away from being separate 'student support' units that operate in isolation, with low visibility (both in and out), inadequate resources, and limited reach. Instead we move towards a converged centre of excellence that raises the visibility, the status and the impact of the service and aims to build strong responsive talent across all service staff. This accountability is enhanced through the activation of multiple stakeholder networks, collaborative research projects, and identification of further opportunities in areas such as research, business, training and development, innovation in services, and peer to peer initiatives.
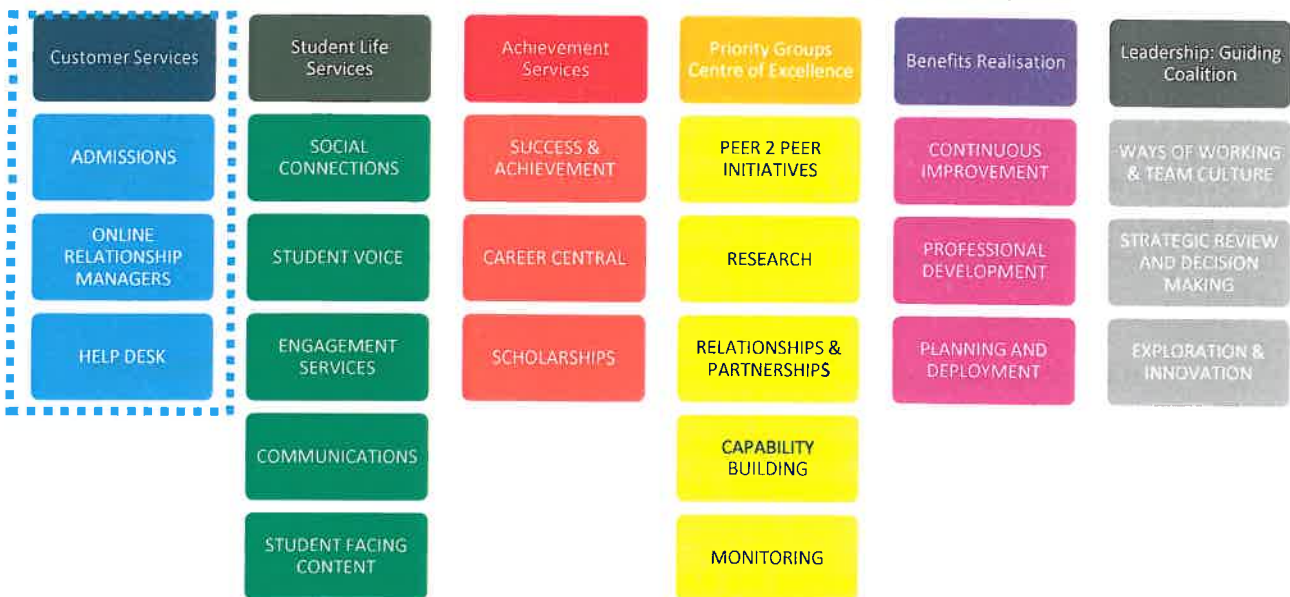
Whilst the scope and focus of the Priority Groups Centre of Excellence (PGCOE) is wider than Māori and Pacific students, it is important to note the genesis of this concept is built upon work undertaken in the Māori Success Strategy (MSS) and the Pacific Responsiveness Strategy (PRS). The MSS illustrated that the approaches that work for Māori, are also the approaches that other students have identified as being important to them also. Specifically the MSS stated that the top two things that made a difference to Māori students were:

The PG COE has a focus on developing staff capability, monitoring service outcomes, building relationships, and leveraging the collective impact of a wide range of stakeholders. Currently there are four priority groups as decided by the TEC (Māori, Pacific, International, Under 25s), and these are the four focus areas of the PG COE.

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Potential Outsourced Component of Model

The dotted blue square shows the customer services area as the component of the model proposed to be outsourced in phase 1.

Customer Services	Student Life Services	Achievement Services	Priority Groups Centre of Excellence	Benefits Realisation	Leadership: Guiding Coalition
ADMISSIONS	SOCIAL CONNECTIONS	SUCCESS & ACHIEVEMENT	PEER 2 PEER INITIATIVES	CONTINUOUS IMPROVEMENT	WAYS OF WORKING & TEAM CULTURE
ONLINE RELATIONSHIP MANAGERS	STUDENT VOICE	CAREER CENTRAL	RESEARCH	PROFESSIONAL DEVELOPMENT	STRATEGIC REVIEW AND DECISION MAKING
HELP DESK	ENGAGEMENT SERVICES	SCHOLARSHIPS	RELATIONSHIPS & PARTNERSHIPS	PLANNING AND DEPLOYMENT	EXPLORATION & INNOVATION
	COMMUNICATIONS		CAPABILITY BUILDING		
	STUDENT FACING CONTENT		MONITORING		

Background to considering the Concentrix Delivery Centre at Mt Albert as an option

The Blueprint Student Services proposal for change recommends the convergence of previously separate services and functions into a new unified and centralised structure leveraging technology to enable self-help options, more proactive and anticipatory services, more personalisation and tailoring, and a greater effort by Unitec on removing barriers to student success.

The proposal for change will be consulting about, and seeking feedback on, two things:

- The overall OSA model
- Implementation of phase one, i.e. the outsourcing of customer services to the Concentrix Delivery Centre at Unitec's Mt Albert campus.

Phase 1 proposal for change – the outsourcing of Customer Services to the Concentrix Delivery Centre at Unitec's Mt Albert Campus

We are proposing that the implementation of the new model for student services is a phased approach with the first phase being the creation of the convergence of the existing Student Administration, Student Central and IMS Helpdesk teams into a new single customer services team.

As part of the assessment of the best operating model for the delivery of the customer services a number of options were assessed against criteria for Quality and Customer Service Improvements ('Would it improve the student experience?'), Operational efficiency ('Would it provide more value?') and economic business case and risk management.

This included the detailed due diligence of four models:

- the existing model (without the customer service improvements envisaged in the OSA model),
- the development of the enhanced internal option as envisaged by the OSA model,
- Concentrix providing a proposal for delivery of current state customer services and,
- Concentrix providing a proposal for delivery of Customer Services for the future state OSA model.

This process found that implementing the future state model with the outsourcing of Customer Services to Concentrix was the model that would provide the best improvement for students while also meeting or exceeding all of the other evaluation criteria.

Subsequently this proposal for change recommends that the Customer Services function be outsourced to The Concentrix Delivery Centre at Unitec's Mt Albert Campus.

It is important to note that this does not mean or should not be taken to indicate that future state OSA services will follow this pattern, as many will still require specialist skills and knowledge that would be best retained and delivered by Unitec. The services impacted are those which are primarily delivered by generalist resourcing which already relies on a casual (primarily student) resource capability.

Who is Concentrix?

Concentrix is a customer engagement company that has been providing services to major global and national clients from Unitec's campus in Mt Albert for nearly three years (originally as IBM, and Concentrix for the last 18 months). Concentrix is an organisation completely focussed on the customer, with a proven track record of providing clients with:

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- Resource Flexibility
- Omni channel experience (a single customer experience across multiple channels)
- Robust and measurable Service Levels
- Implementation of a robust Knowledge Management System
- Lower operating cost model
- Customer focussed culture
- Mature continuous improvement structure
- Quality Assurance controls
- Thought leadership in the area of customer engagement

Globally, as an organisation in the top 10 providers of these services, Concentrix has extensive experience in Omni channel engagement and management. Concentrix's Omni channel approach is to:

- Operate against a holistic, single-view of the customer that includes all customer touch points;
- Leverage all available information, including relevant back office operational information, integrated into processes via analytics;
- Use both isolated, individual-based views and traditional demographic-based views coupled with historical information to help form the next best action for the customer;
- Ensure that Omni-channel capabilities can be deployed proactively to customers to reduce customer effort.

At its core, the Delivery Centre this is based around securing high quality skilled employees (largely Unitec students) to provide an efficient and high quality tailored customer service facility. Unlike other centres, the Concentrix Delivery Centre is highly integrated within Unitec's educational environment with a significant number successful projects being undertaken, including:

- supporting the delivery of courses through identification of appropriate guest lecturers etc,
- providing expert advice on course and programme development,
- providing a number of tailored earn as you learn opportunities for Unitec computing students in support of IBM
- facilitating work experience and work integrated learning opportunities
- directly employing over 400 Unitec students since commencement
- partnering with Unitec on a number of stakeholder events, school engagement activity and wider strategic initiatives.
- supporting Unitec's aspiration to contribute to the wider economic and social wellbeing of New Zealand by directly creating 700 jobs within the local community and the wider Auckland region.

The large number of Unitec students who have been working alongside full-timers have gained valuable experience in customer services. Unitec students are recruited for work that fits in with their studies, giving them the opportunity to gain valuable workplace experience that could give them a head-start in the competitive job market when they graduate.

The existing relationship with Unitec, their location on Unitec's Mt Albert campus, their significant employment of Unitec students, their existing technology platforms and their proven expertise in this field, especially their ability to help transform the customer experience significantly, increases the opportunity they present compared to other providers.

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This is not just a call centre solution, it is about transforming the student experience and Concentrix have demonstrated capabilities in this space.

So what Operational governance will be put in place to ensure that this outsource is effective?

As part of ensuring that the services are delivered in accordance with Unitec's expectations a governance structure and procedures will be designed to achieve the following objectives:

- ensuring the proficient delivery of the Agreed Services
- establishing an effective relationship and communication channel between Unitec and Concentrix
- proactive management and planning that will optimise the value of the relationship and the Services
- establishing an effective mechanism for the escalation of material issues in respect of the Services.

For the proposal for change the key Unitec roles in providing the governance oversight will be the responsibility of the Benefit Realisation team of the OSA Service model.

SECTION FOUR
Proposed Changes

In this section:

1. *Project Phasing and impacted roles*
2. *Positions proposed to be surplus to requirements/needs and position changes*
3. *New positions proposed by Concentrix (including Concentrix recruitment process)*
4. *Implementation Plan for Phase One*

PROPOSED CHANGES FOR IMPLEMENTATION PHASE 1

This proposal for change only covers Implementation Phase One of the Services Blueprint, and focusses on the Customer Services area, i.e the area that will provide the Admissions, Help Desk and Online Relationship Management services to our students. The proposal is for Customer Services (phase one) to be in place and operational on the 1st of April 2016.

Customer Service	Student Life	Achievement	Priority Groups Centre of Excellence	Benefits Realisation	Leadership
ADMISSIONS	SOCIAL CONNECTIONS	SUCCESS & ACHIEVEMENT	PEER 2 PEER	CONTINUOUS IMPROVEMENT	WAYS OF WORKING & TEAM CULTURE
Online Relationship Managers	STUDENT VOICE	CAREER CENTRAL	RESEARCH	PROFESSIONAL DEVELOPMENT	STRATEGIC REVIEW & DECISION MAKING
HELP DESK	ENGAGEMENT	SCHOLARSHIPS	RELATIONSHIPS	PLANNING AND DEPLOYMENT	EXPLORATION & INNOVATION
	COMMUNICATIONS		CAPABILITY BUILDING		
	Student Facing CONTENT		MONITORING		

Project Phasing and the impacted roles

We intend on following a three phase approach to fully converge all the services set out in Section 3. Each Phase will focus on implementing a particular area of the model. These are:

- Phase One focuses on the development and implementation of the Customer Services functions of the model. This proposal for change sets out that these services are intended to be 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, and
- Phase Three focuses on development and implementation of Library and International and working towards full convergence from Jan 2017.

Each of these phases will impact different staff. Below is our current view of which areas will be impacted during each phase of the project.

Phase One

Student Administration

Student Central

Ask IMS Help Desk

Phase Two

Pou Aroha

Maia Maori Development Centre

Pacific Centre Teaching, Learning & Research

Te Puna Ako Learning Centres (Student facing)

Outsourced engagement services (EdCollective)

Phase Three

International Centre

The Library

In this document we are only consulting on Phase One - that is Customer Services.

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Customer Services

The traditional service models have worked well for many years but now we are finding that some aspects of those traditional models are limiting our impact.

This requires a substantial transformation in our ways of working, the processes and tools we use and the type and level of customer service we deliver to our students and that our students consistently expect throughout their time with us.

Under the proposed new model (where our students are at the centre), the primary contact point for all student services is the Customer Services team. This team will deliver a single point resolution for all student queries; provide seamless interactions by providing warm handovers to specialists (as required); proactively anticipate the students' needs and pre-emptively engage students and continue to build and develop customer profile through capturing all engagement activities with students.

As stated above the move to the new model in phase one will have an impact for staff in:

- Student Central
- Student Administration
- Information Management Services – Helpdesk

POSITIONS PROPOSED TO BE SURPLUS TO REQUIREMENTS/NEEDS

Based on the proposed headcount there is a decrease in the number of permanent positions of fulltime employees. These are in the areas of Student Administration, Information Management Services (Helpdesk) and across Student Central. The proposed outsourced model will mean that these services will be staffed and delivered by Concentrix.

The following table shows a summary of the proposed surplus to requirements/needs:

Role	Business	Current
Help Desk Analyst	Information Management Services	4
Help Desk Functional Team Leader	Information Management Services	1
IT Helpdesk Analyst	Information Management Services	1
Student Administrator	Student Administration	19
Team Leader – Student Administration	Student Administration	2
Manager Student Administration	Student Administration	1
Programmer Advisors	Student Administration	19
Team Leader	Student Administration	3
Student Centre Manager	Student Administration	2
Director Student Services and Administration	Student Services and Administration	1
Proposed Total		53

It is proposed that 10 roles will be surplus to requirements / needs. Currently there are 53 employees (50.5 FTE) under these proposed changes that will be affected. Timings for these changes are anticipated to be 1 April 2016.

Change of Accountabilities

Proposed changes to accountabilities of current positions:

Position	Proposed change	Reports to
Customer Care Manager	Changed responsibilities	Director Information Management Services

Changes in reporting lines

Proposed reporting lines changes for current positions * reporting line change only between Phase 1 and Phase 2 implementation.

Position	Currently reports to	Proposed reports to
* Graduation Manager	Manager Student Administration	Executive Director Organisational Development
Cashiers	Manager Student Administration	Finance
Finance Administrators	Manager Student Administration	Finance

SECONDMENTS

There are a number of staff who are seconded from potentially impacted positions. Staff who have been seconded from a potentially impacted position will have been notified of the potential impact to their substantive position. Each of these secondment arrangements will however be assessed when an outcome is decided and if amendments to the secondment arrangements are deemed necessary, we will engage with the staff involved to discuss the impact. Where secondments end before the outcome is made, staff will return to their substantive positions.

NEW POSITIONS PROPOSED BY CONCENTRIX

The proposal, as mentioned earlier, is that all Customer Services roles will be outsourced to Concentrix. Concentrix are proposing the following new position that they will staff:

- Admissions team leader
- Customer Services team leader
- Admission Advisor
- Customer Services Specialist (including Online Relationship Management)

Concentrix is an external organisation proposing to provide a service to Unitec. This proposal does set out the Concentrix recruitment process for information purposes. Although we can explicitly state the services (and the service levels) we need to have delivered, we are not in a position to control who Concentrix employs. Concentrix have proposed their recruitment process, detailed in the table below and their positions descriptions for each of the proposed positions are in Appendix (G).

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Step	Description	Selection Criteria	Completed by	Time Frame
Advertise Position	Place role on job boards etc	N/A	Concentrix Recruitment	Until completion of hiring campaign
CV Screen	Determine whether the candidate has relevant work experience and education (if required). Whether they have stayed at previous employers for a reasonable period of time.	- Relevant work experience - Skills match - Candidate in country	Concentrix Recruitment	Week 1 – 2
Phone Screen	Understand the candidates' background. Determine whether they have appropriate phone manner. Ensure reasonable language competence	- Ability to communicate - Phone manner - Aligned understanding of role		Week 1 – 2
Testing	Determine whether the candidate has the necessary level of technical ability and knowledge.	Meets/Exceeds minimum requirements – above global average for: - Typing test - Customer service test	Concentrix Recruitment	Week 1-2
First Interview	Behavioural-based interview in order to Understand the candidates' ability to communicate and determine whether suited to the organisation. Understand why they are interested in the job and whether they are suitable. Assess for culture fit/suitability.	- Responses align to Concentrix values and culture - Responses align to client values - Candidate has clear understanding of position	Concentrix Hiring Manager	Week 3-4
2nd Interview (if required)			Concentrix Hiring Manager	Week 3-4
Assessment centre (Agent / CSR Roles)	Role play/simulation to determine how the candidate will be able to manage calls and challenging customer service situations.	- Candidate demonstrates suitable behaviour when interacting with customer - Candidate can adapt to varying situations - Candidate demonstrates ability to manage challenging customer	Concentrix Hiring Manager and Quality Team	Week 3-4
Criminal Background Check	Criminal background check initiated			Week 3 – 6
Offer	Offer Letter / Employment Contract sent to candidate		Concentrix Recruitment	Week 4 - 6

IMPLEMENTATION PLAN

The purpose of this plan is to set out the proposed approach and timeline for managing the implementation of the outsourcing option.

This section is to further inform employees and other stakeholders of the various options that will be applied to manage any staff surplus.

This process is consistent with all employment agreements applying to affected employees.

WHO DOES THE PLAN APPLY TO?

This approach applies to "affected" employees, being those employees who fill roles that are confirmed as surplus to requirements/ needs.

This includes permanent employees; i.e.:

- Permanent full-time and proportional employees; and
- Permanent employees currently on all forms of leave, including leave without pay and parental leave, as well as employees who are currently seconded to other positions but their permanent substantive position is affected.
- Secondments from potentially impacted positions

Fixed-term (temporary or limited tenure), hourly paid or casual employees are not covered by this approach even though roles they currently perform may be affected. In this case the relevant provisions of their employment agreement will apply.

Employees in positions not confirmed as surplus (those reconfirmed into their positions) are also not covered by this approach.

OPTIONS

The following options apply to employees whose positions are declared as surplus to requirements/ needs:

- Attrition, or the normal process of staff turnover where an employee resigns;
- Redeployment, where an employee is successful in obtaining an alternative position within Unitec, such that their employment does not terminate and they do not receive a severance payment;
- Enhanced early retirement, where an eligible employee elects to be paid the money available under the severance option according to the conditions of the employee's superannuation scheme to make up the actual superannuity payable;
- Severance, where an employee is paid their severance payment calculated in accordance with their employment agreement.
- Redeployment, where an employee is successful in obtaining an alternative position within Unitec, including within the new structure, such that their employment does not terminate and they do not receive a severance payment; (NOTE: Currently working through potential scenarios around voluntary redundancy. This may require additional points.)

The above options which are mutually exclusive continue to be available to any employee whose position has been declared surplus until their last day of employment.

ATTRITION

As an option, attrition has been considered and found not to be viable for implementing the required changes due to the nature of this proposal. In instances where employees do choose to resign during the change process, consideration of additional options will not be required and they will not be entitled to severance payments.

EARLY ENHANCED RETIREMENT

Where this is provided for in an affected employee's employment agreement, the employee may elect to take early enhanced retirement as an alternative to severance (redundancy). Early enhanced retirement enables an eligible employee to be paid the money available under the severance option which may, if the employee desires, be used according to the conditions of the superannuation scheme of which the employee is a member to make up the actual superannuity payable.

If early enhanced retirement is agreed with the affected employee, then this will be confirmed in writing.

SEVERANCE

If none of the aforementioned options are agreed, then the affected employee's applicable notice period will be completed (notice will have been given at the same time as the surplus staffing situation is confirmed). Where a longer notice period is preferred for operational transition reasons, this may be agreed between Unitec and the affected employee.

During the notice period, Unitec and the employee may consider any opportunities for other options that may arise. If an affected employee is appointed to another position within Unitec or another option outlined in this document is agreed, then the employee will no longer be paid severance.

Where an affected employee has not been appointed to another position within Unitec during the notice period and no other option is agreed, severance compensation will be paid at the end of the notice period in accordance with the affected employee's employment agreement.

REDEPLOYMENT

The option of redeployment is to place affected employees into suitable alternative positions while ensuring that Unitec meets its statutory responsibility under the State Sector Act to appoint the best person for the job.

A suitable alternative position is one that involves duties that are not unreasonable taking into account the employee's skills, knowledge, attributes, qualifications and experience, and where the employee could reasonably be expected to effectively carry out those duties with a reasonable amount of training and development.

A proposed timeline is presented in section 1 of this document, and the following high level steps and timeframes will be followed for affected employees who would like to be considered for redeployment to an alternative position across Unitec.
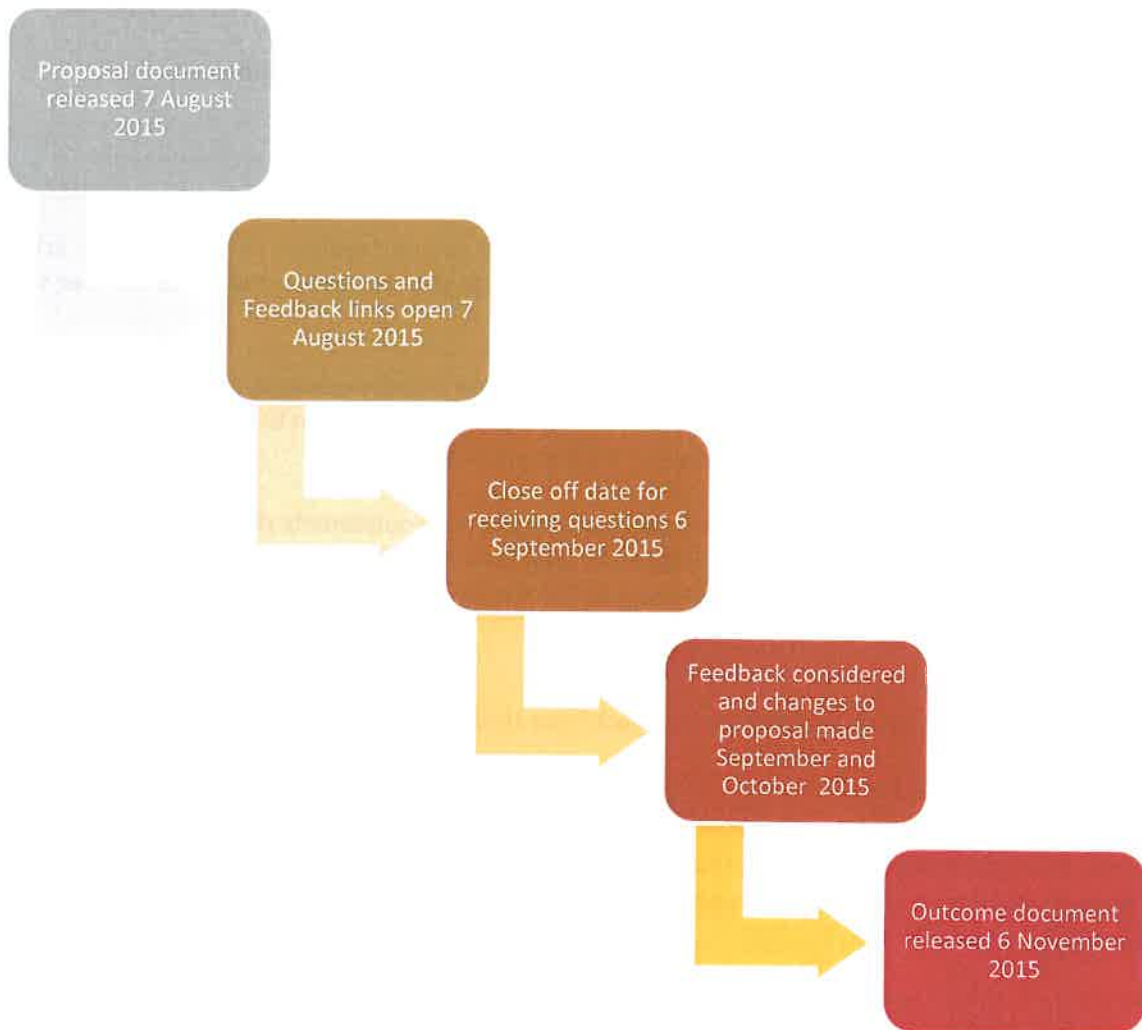
SECTION FIVE
Consultation Process

In this section:
1. *Consultation Timeline*
2. *Support available to staff*
3. *Questions during Consultation*
4. *Feedback during Consultation*

Consultation Process

Proposal document released 7 August 2015

Questions and Feedback links open 7 August 2015

Close off date for receiving questions 6 September 2015

Feedback considered and changes to proposal made September and October 2015

Outcome document released 6 November 2015

PROPOSED TIMELINE

Action	Date
Proposal to staff	7 August 2015
Staff Consultation	7 August – 6 September (calendar month)
Feedback received considered	4 September - 30 October
Final document presented to staff	6 November
Proposed time for Formal notification	TBC

All staff are invited to take time to read the proposal and submit feedback via the channels listed below. Staff are invited to provide feedback on the proposed changes to the Customer Services positions to resource it, and also the selection criteria.

All feedback will be considered fully prior to the preparation and presentation of the final outcome document. You are entitled to seek advice and/or representation in relation to this proposal and your feedback, including from your union if you are a union member.

Once a final decision is made on the proposed staff surplus to requirements situation for phase one, then affected employees will be notified, together with their unions if applicable.
The proposal and proposed position descriptions for the new positions set out in the proposal are available on NEST (LINKS to be provided)

Please note that we will also be inviting feedback from students through the consultation period.

Support available to staff (PLACEHOLDER to be confirmed)
It is widely acknowledged that Unitec is undergoing transformation change in order to realise the Unitec Strategic Framework. Unitec recognizes that this places a significant pressure on our staff. Employee Assistance and Wellness support will be provided to staff throughout this consultation process.

At the start of 2015, we tested a number of initiatives which would support our staff to manage the change more effectively. A number of these initiatives received very positive feedback and we are making these available to staff during Consultation and during the planned implementation.

QUESTIONS DURING CONSULTATION

If you want to ASK QUESTIONS	
Where/how?	Go to: [insert link to survey form] Simply follow the prompts
Description	For questions about: 1. Development process. 2. Consultation process. 3. What will happen next? 4. Timelines. 5. Terminology used in the proposal. 6. Your options.

PROVIDING FEEDBACK

If you want to GIVE FEEDBACK	
Where/how?	Go to: [insert link to survey form] Simply follow the prompts.
Description	Feedback on any aspect of the proposed model. If you disagree with elements of the model, your feedback should outline what you think could enhance or improve or be an alternative to the proposed model. If you agree with elements of the model your feedback can still outline what you think could enhance or improve the proposed model. You can answer individually or as a group.

All staff and students have the opportunity to provide feedback regarding phase one of the Blueprint project and the wider Student Services operations model.

You are entitled to seek advice about this proposal and your feedback and to bring a support person or representative to any feedback meetings that you have.

All feedback must be received by close of business 6 September 2015

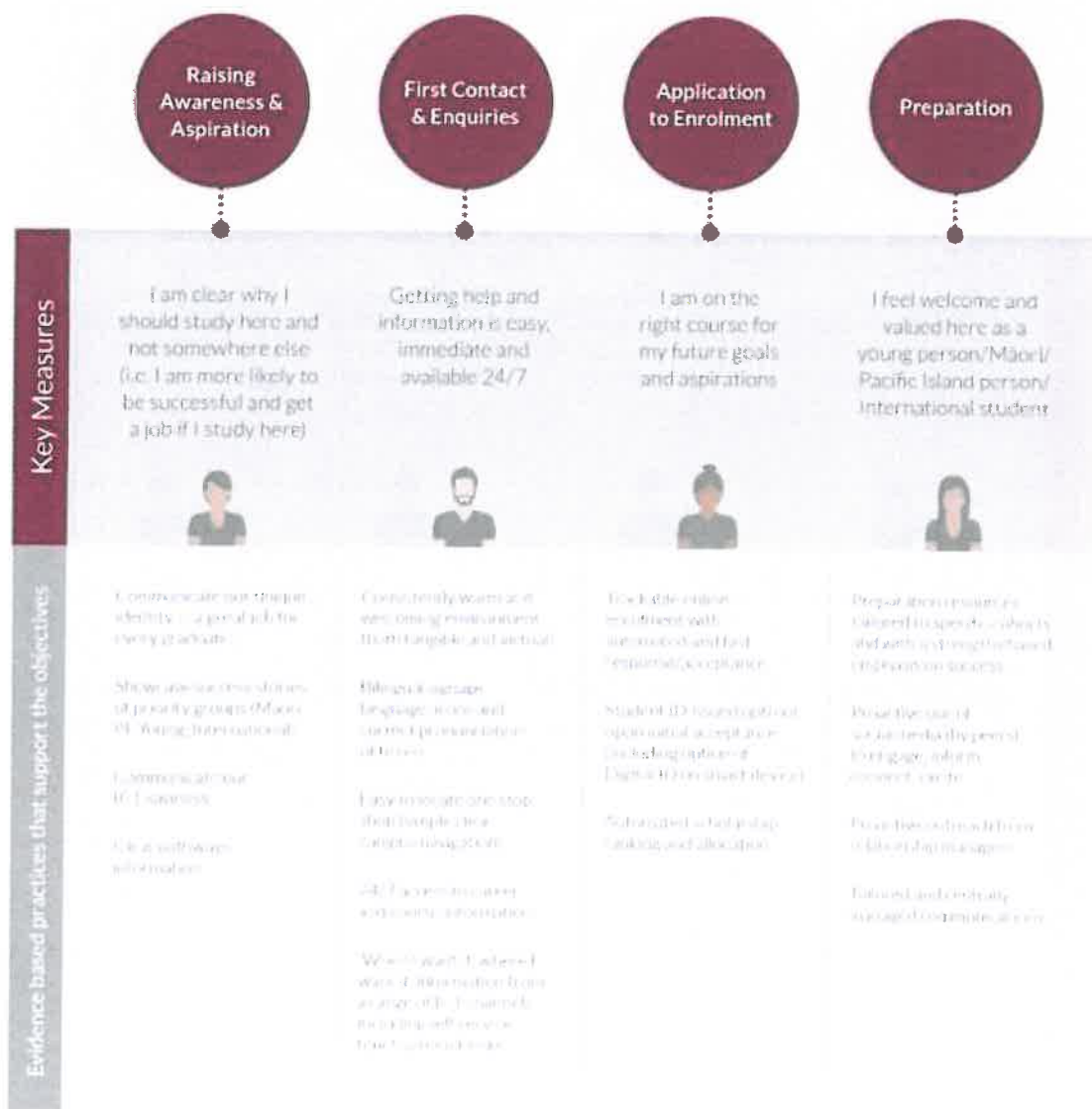APPENDIX A – Student Life Cycle Overview

End-to-End Process
Across Student Life Cycle

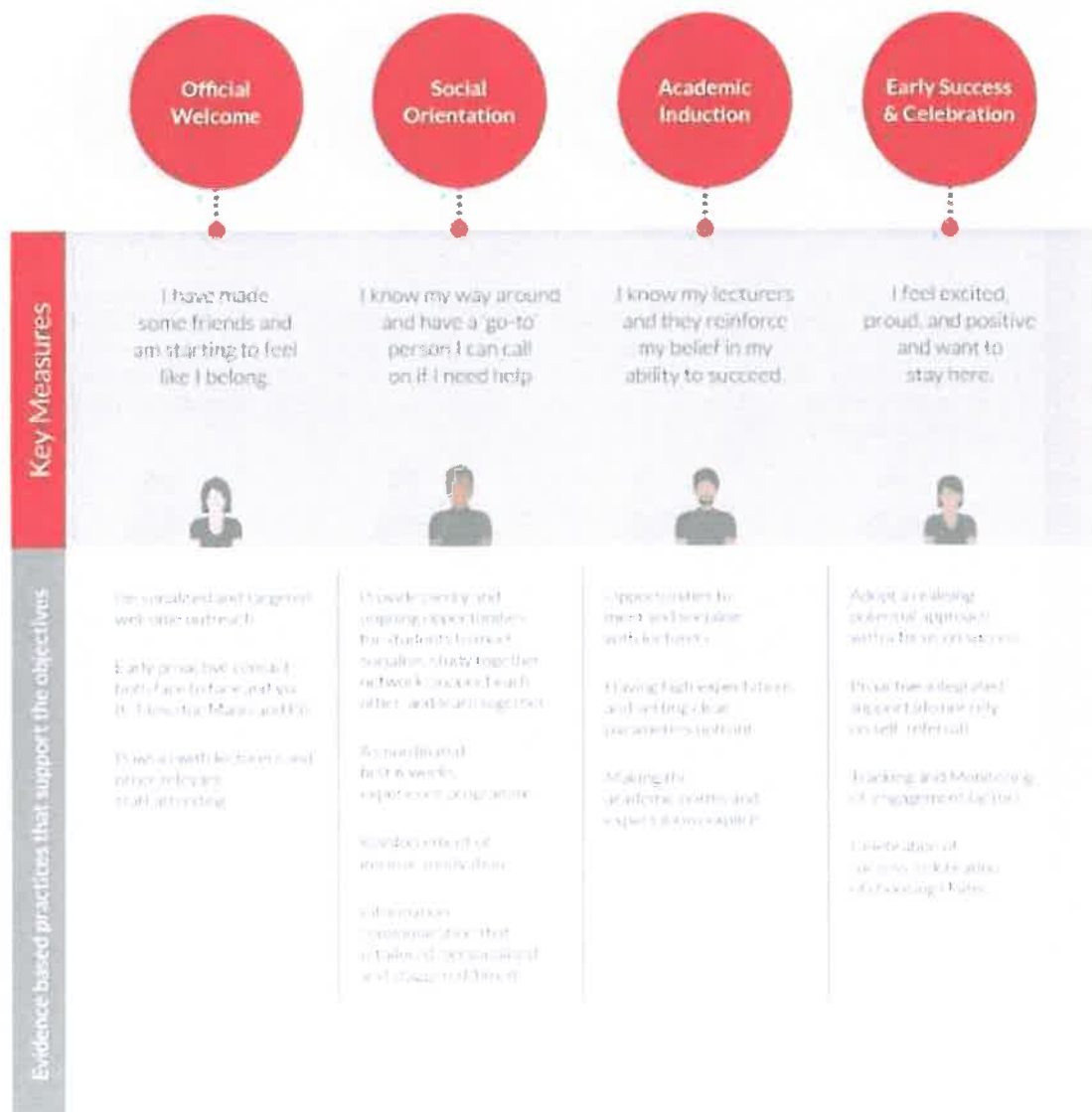**Phase 1: Acquistion**
Entry Transition Engagement

Phase 4: Extension
Exit Transition

Phase 2: Transition
First 6 Weeks Engagement

Phase 3: Retention
Progressive Engagement

Confidential draft working document for Unitec's consideration - any resulting proposal will be subject to consultation

Phase 1: Acquistion
Entry Transition Engagement

How Unitec represents itself to prospective students
in the community, the processes and systems that
govern these early interactions and the environment
within which these interactions take place

(Student Life Cycle Report, 2009)

Prospective Student

Raising Awareness & Aspiration

First Contact & Enquiries

Application to Enrolment

Preparation

Key Measures

I am clear why I should study here and not somewhere else (i.e. I am more likely to be successful and get a job if I study here)

Getting help and information is easy, immediate and available 24/7

I am on the right course for my future goals and aspirations

I feel welcome and valued here as a young person/Māori/ Pacific Island person/ International student

Evidence based practices that support the objectives

Phase 2: Transition
First 6 Weeks Engagement

The process by which Unitec successfully welcomes and engages new students within the learning, social and organisational environments. Transition begins from enrolment through to the first 6 weeks.

New Student

Official Welcome	Social Orientation	Academic Induction	Early Success & Celebration

Key Measures

I have made some friends and am starting to feel like I belong.	I know my way around and have a 'go-to' person I can call on if I need help.	I know my lecturers and they reinforce my belief in my ability to succeed.	I feel excited, proud, and positive and want to stay here.

Evidence based practices that support the objectives

Phase 3: Retention
Progressive Engagement

Developing and deepening a sense
of belonging and involvement

Student

Ongoing Social Engagement

Further Successes

Involvement & Voice

Sense of Place

Key Measures

I have a sense of belonging here

I am supported to be successful and have had a successful first year

I am able to be involved in ways that appeal to me

I see myself reflected around me in the staff, the environs and the curriculum and it bolsters my sense of identity

Evidence based practices that support the objectives

Phase 4: Extension
Exit Transition

Graduate

Managing the process whereby students complete their studies and are prepared and able to enter the workplace, and the ongoing engagement and involvement of graduates with Unitec through the provision of an alumni system

(Student Life Cycle Report 2009)

Preparation of Work Readiness	Industry Links	Celebration of Successes	Graduate Engagement

Key Measures

I am ready to transition into the workforce and feel confident of my ability to get a job

I would recommend Unitec to my friends and family

I want to maintain my connection to Unitec through an Alumni programme

Evidence based practices that support the objectives

APPENDIX B – Library Convergence

Background

In July 2014 the Library Redesign document announced a two stage implementation: stage 1 was to see service and operations changes and a reframed workforce, and stage 2 would involve 'embedding the library inside a convergence of services' (p.7). It envisaged that this will begin in 2017.

The nature of the 'embedding' and 'convergence' was left vague. Nonetheless, the document included snapshots of service innovation that included statements such as: 'What is required is "space reconfigured around experience, expertise and communication services rather than collections". ... We should consider who our partners will be in the collaborative development of these services.' (p.2)

During 2015, work on refining the Blueprint model has shifted 'convergence' towards an approach in which existing services are 'merged' to support student customers across the four phases of the student journey: acquisition, transition, retention, and extension. This matches the observation in the September 2013 report 'Unitec Libraries': 'A successful model has the student or learner at the centre. What will make it easy for the student to access the range of services, technology and support needed to support his or her learning journey? The boundary between library and other student support services is blurring.' (p.18)

Also during 2015, the library has been a pilot of the 'Think One Team' approach to work. This envisions nimble, connected teams that align, collaborate and learn. It asks, metaphorically: 'you're the vodka, you're the squash, what is the wow?' The methodology acknowledges that people need to belong to a team, and that belonging to two teams is feasible – and, in complex organisations, maybe desirable. This proposal is based in part on Think One Team model; it emphasises the power of 'and' over 'but'.

Proposal

Next year there will be consultation on a proposal that from January 2017, the Services and the Branches Team joins the Student Achievement Group in the OSA model.

Noting that library services are increasingly being delivered on-line, it will also be proposed that the Resources team joins Information Management Services, with the Manager Resources reporting to the GM IMS. Last year, the library successfully implemented ALMA, Unitec's new platform for library and information systems. The capabilities of the Resources team will be valuable for rolling out further on-line and self-access services to students and staff, and reciprocal benefits for the library Resources team will be realised.

The knowledge specialist staff in the Services Team work closely but not exclusively with academic staff. A project will be established early in 2016 to explore ways to integrate their work with that of other staff who provide partnered support for teachers (eg: Te Puna Ako Learning Advisers, Kaihautu). It is acknowledged nonetheless that any new arrangement will

Confidential draft working document for Unitec's consideration - any resulting proposal will be subject to consultation

need to maintain existing collaborations between knowledge specialists and customer service specialists.

The proposals above will mean that on the one hand the library would be unbundled and repackaged, but at the same time there would still be a Unitec library that will deliver on the reconceptualised service statement in the Redesign (see pp.21-24) and that will be required to maintain and exceed levels of customer service as measured, for example, in the Australasian Insync survey.

The Redesign stated that the position of Library Director 'may be affected by implementation of ... service convergence' (p.68). It will be proposed that this position be disestablished at the end of 2016 and replaced by the position or role of a Lead Librarian who will not have accountability for managing staff but will be responsible for working with relevant GMS and executive to ensure coherence of aggregation, curation and reference services, and for undertaking roles frequently associated with a 'Library Director' (eg: with regards to Copyright and IP). The Lead Librarian may also be expected to propose and establish a cross- (and potentially inter-) organisational curation initiative that complements digital literacy programmes.

APPENDIX C - CURRENT, PROPOSED AND INDICATIVE ORGANISATIONAL STRUCTURES

CURRENT STATE – STUDENT SERVICES AND ADMINISTRATION
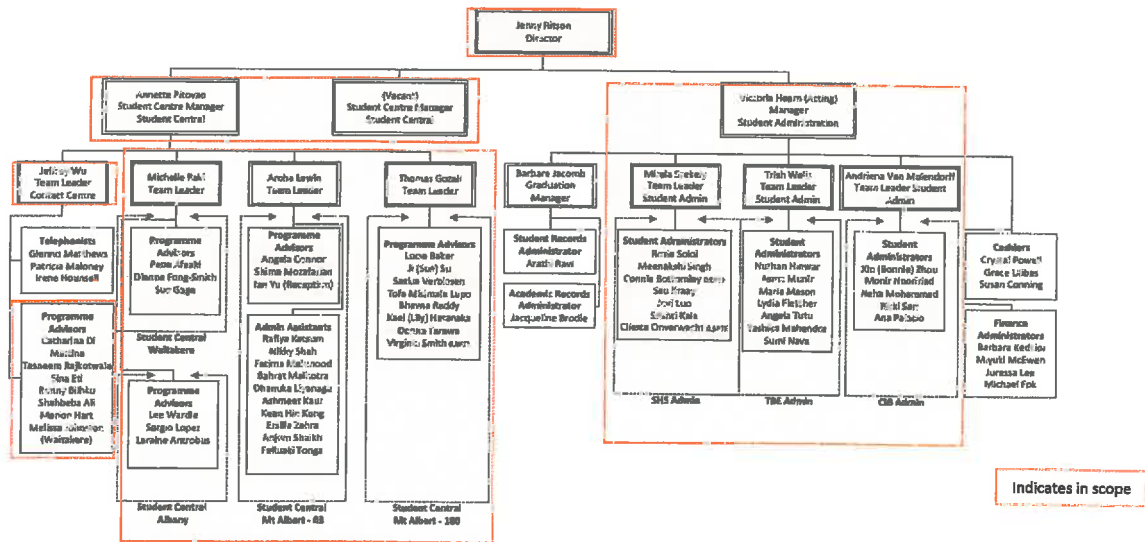

Figure 3 Student Services and Administration

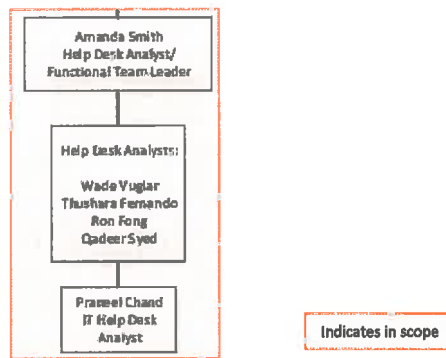CURRENT STATE – INFORMATION MANAGEMENT SERVICES: HELPDESK

Figure 4 - Information Management Services - Helpdesk

INDICATIVE CONVERGED ORGANISATIONAL STRUCTURE (Phase 3)