1. Support Services Report Template

Report Info
Name of the person completing this report: Glen Perry
Title of the person completing this report: Assistant Vice President, PEMSA Technology Support and Student Data Management
Supervisor/dean reviewing report: Linda Dalton
Division/College: PEMSA
Service: Coordinate technology support for all PEMSA units (with ITS)

3. Mandated Service

Link to Scoring Rubric

1.1 Please indicate below if any aspect of the service is legally mandated by any of the following and provide the relevant reference.

Campus Policy: CSUEB Procurement and Purchasing Policies
Any other: CSUEB Project Management Methodology

Provide a brief explanation, if necessary, in < 60 words.

Technology Support for PEMSA coordinates with Information Technology Systems (ITS) on initiating project requests, computing equipment procurement, hardware and software. The AVP works to develop the baseline and specialized software and hardware integration needs for PEMSA units. The AVP also monitors service tickets for requests initiated by PEMSA which require an ITS response and escalates issues when necessary.

4. Importance of Service

Briefly describe the service in terms of its primary function(s) and purpose(s) using <120 words

This service incorporates two distinct areas: oversight of all PEMSA technology project requests and implementation; and monitor/escalate service desk delivery functions from ITS to PEMSA. Project oversight can include serving on steering committees, project sponsorship and project management (for a divisional project). For enterprise projects involving a PEMSA unit, the AVP is the primary liaison with ITS and works with an ITS project manager to define project scope, timelines, methodologies and benchmarks. Technical support functions in two ways when PEMSA is the unit requesting services. The AVP monitors responses to service requests submitted by PEMSA units, works with ITS to define unique software integration needs for desktop computing, manages the PEMSA equipment replacement process, and initiates major system replacement projects.

Link to Scoring Rubric

2.1 Who are the primary receivers of this service? (Please enter the percentage of each user group that is relevant)

Administrators/staff: 100%
Total: 100%

Link to Scoring Rubric

2.2 Please indicate the direct or indirect impact of the service on students for each of the three University Action/Student Impact Areas listed below (for example processing financial aid applications would be direct impact on students while managing utility services would be indirect).
<table>
<thead>
<tr>
<th>Pre-college (helping students to enter the system)</th>
<th>Direct Impact on Students</th>
<th>Indirect Impact on Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>

Provide a brief narrative (<60 words each) explaining your selection for each area.

<table>
<thead>
<tr>
<th>Pre-college (helping students to enter the system)</th>
<th>Evidence submitted to support the chosen selection (&lt;60 words for each)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technology Support insures that other PEMSA units have the software and systems necessary to effectively accomplish their missions to recruit, admit and enroll new applicants. This service works to select appropriate software solutions that can be integrated with existing systems which are in place in the division, especially PeopleSoft Student Administration.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>During college (helping students succeed while they are at Cal State East Bay)</th>
<th>Evidence submitted to support the chosen selection (&lt;60 words for each)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technology Support insures that other PEMSA units have the software and systems necessary to effectively accomplish their missions to serve students. This service coordinates with ITS to deliver self service applications to students with the goal of keeping the student experience in using technology for student administrative functions at the fore front of all design and implementation.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</th>
<th>Evidence submitted to support the chosen selection (&lt;60 words for each)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Efficiency work is made possible through effective and strategic use of technology. The University would be seriously negatively impacted if efforts were not supported by systems that enable effective communications to prospects/applicants. One example of the impact on recruitment is the implementation of externally-supplied lists of prospective students. This process must be integrated to import data and enable tracking of prospects.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>During college (helping students succeed while they are at Cal State East Bay)</th>
<th>Evidence submitted to support the chosen selection (&lt;60 words for each)</th>
</tr>
</thead>
<tbody>
<tr>
<td>PEMSA Technology Services selects tools that promote effective administrative processes. The University would be seriously negatively impacted if efforts to communicate with students were not adequately supported. One example of the impact on recruitment is the implementation of a system</td>
<td></td>
</tr>
</tbody>
</table>

Link to Scoring Rubric

2.3 Applying the four choices presented below, please indicate the consequence of NOT having this service on each of the actions in the left hand column.

<table>
<thead>
<tr>
<th>4 - Service provides evidence of direct impact in more than one area</th>
<th>3 - Service provides evidence of direct impact in one area</th>
<th>2 - Service provides evidence of indirect impact in more than one area</th>
<th>1 - Service provides evidence of indirect impact in one area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>✓</td>
<td></td>
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<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>
### 2.4 Alignment with Shared Strategic Commitments

How does this service contribute to or align with any of the eight Shared Strategic Commitments (SSC) listed below?

<table>
<thead>
<tr>
<th>Reinforce academic quality through open-minded inquiry, innovative teaching, engaged learning, and distinguished scholarship</th>
<th>If aligned or contributing, provide a description. (&lt;60 words for each SSC)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enhance our inclusive campus, responding to the backgrounds and interests of our diverse community and promoting their academic, professional and personal development</td>
<td>Through the use of technology this service provides each PEMSA unit with the access and tools needed to view and update applicant and student records in detail. This enhances the enrollment and advisement experiences by responding to student needs in real time and it provides information and documents to the staff and faculty who work directly with applicants and students.</td>
</tr>
<tr>
<td>Serve students first, by expanding access and enhancing each student's educational experience and prospects for success as a graduate and life-long learner</td>
<td></td>
</tr>
<tr>
<td>Foster a vibrant community through enriched student services and student life that support student engagement and learning</td>
<td></td>
</tr>
<tr>
<td>Contribute to a sustainable planet through our academic programs, university operations, and individual behavior</td>
<td></td>
</tr>
<tr>
<td>Continuously improve our efficiency, transparency, and accountability while practicing mutual respect, responsiveness, and collaboration across the University</td>
<td>PEMSA Technology Support is charged with initiating significant projects targeted at areas in need of improvements in efficiency of operations and accountability for the work performed.</td>
</tr>
<tr>
<td>Support the civic, cultural, and economic life of all communities in the regions we serve through partnerships that promote education and social responsibility</td>
<td></td>
</tr>
<tr>
<td>Demonstrate our continuing record of leadership and innovation in higher education, focused on 21st century skills, including science, technology, engineering, and mathematics (STEM)</td>
<td></td>
</tr>
</tbody>
</table>

### 2.5 How might the demand for this service change over the next five years? (Please choose one category below).

Likely to increase
Provide a rationale for your choice (assumptions, impact of new policy, etc.) in <120 words.

The need for services and associated technical support and solutions increases in response to the growth in the applicant and student populations. The use of technology is often used to offset the difference when staffing cannot be increased to accommodate application and enrollment growth. The increases in data management needs will call for upgraded desktop solutions and major systems such as document imaging. PEMSA Technology Support, coordinating with central ITS, plays a central role in making decisions regarding these projects.

5. Quality of Service

Link to Scoring Rubric

3.1 Do you assess the quality of the service you provide?

Yes

If “Yes”, what benchmarks, best practices or measures of success, either internal or external, do you use to measure service quality (e.g., timeliness, accuracy, adequacy, meeting deadlines, satisfactory completion of assignment, etc.)? Please describe in <120 words. If no, please explain.

When projects are chartered we typically set benchmarks or end dates by which we expect to have achieved established goals. This may be accomplished in cooperation with the ITS project management office. During the life of the project the timeline is monitored on a regular basis and project team meeting are held on a regular basis. Reports are used to monitor ticket status. The tickets opened by PEMSA are monitored for progress toward completion. In the most extreme cases, the issue is brought to the AVP for investigation and escalation. Through the use of relationships with individual ITS managers, we have been successful.

Link to Scoring Rubric

3.2 During the last three years, have you adopted any measures to improve the quality of this service? Please describe in <120 words.

The most significant development has been in the use of reports for tracking service tickets. This has reduced the ‘lost in email’ problem that would delay response to those we serve. We continue to promote the use of service tickets as the best way to insure a request will be acknowledged, assigned and completed. During the same period, PEMSA technology support has worked closely with ITS in the development of measures and rubrics to determine project priorities. This process continues today and the AVP remains actively involved. Larger technology projects include the formation of steering committees to assist in setting goals, priorities and outcomes which shape the expectations that often become the measurement of quality.

Link to Scoring Rubric

3.3 What idea(s) do you have for improving the quality of this service within existing resources (e.g. development of benchmarks, surveys, feedback, etc.)? Please describe your plan(s) in <120 words.

We do plan to increase our use of formalized project planning which will include benchmarks. We do not currently have a formal feedback process other than the appreciative emails we receive after successfully fulfilling a request. User satisfaction is important in our daily work and we will investigate the collection of customer survey data through the service desk ticketing system.

Link to Scoring Rubric

3.4 What ideas do you have for improving the quality of the service if additional resources were provided. Please describe your idea(s) in <120 words.

If additional resources were available to focus on service tickets which do not require a technical solution, for example a request for
an imaged document search, we may be able to provide a more timely response to urgent or timely requests for other PEMSA units. Increased human resources may enable us to respond to multiple request for services on the same timeline rather than the linear project development approach that is now often necessary.

Link to Scoring Rubric

3.5 Do you use any formal or informal process to assess the level of satisfaction of the service users?

Yes

If yes, describe the process and most recent results in <120 words. If no, please explain.

The process is totally informal and is built into the way we work with our clients. We maintain a continuous dialog with PEMSA units by attending their department meetings and meeting with the management teams. In these meeting we participate in discussions of needs that can be met through the use of technology and generate tasks or projects based upon those discussions. This interaction increases user satisfaction and understanding of timelines for completion and any roadblocks to success or timely completion. The technical support activity in PEMSA works with users to develop requests for service from other PEMSA resources, such as the student systems group, and to prepare the requests to connect with ITS resources when necessary.

Link to Scoring Rubric

3.6 The university recently conducted a customer satisfaction survey for some services (results for this service are attached, if applicable). Do you have any comment or response to the results? Please describe in <120 words.

There are no survey results for this service.

Link to Scoring Rubric

3.7 Do you have any formal or informal guidelines for personnel in your department regarding how to treat/interact with receivers of this service?

Yes

If yes, please describe in <120 words. If no, please explain.

Yes, we have established guidelines that relate to service tickets. Tickets will be acknowledged with 8 hours. After assessment, the ticket will be assigned for evaluation. The assigned personnel will make contact with the requester with 24 hours. After initial review of a request for service, the client will be given an expected timeline for a response to the issue. If the requester is not satisfied with the response received, PEMSA managers have the opportunity to escalate projects or issues to the AVP for further consideration or prioritization. Personal contact supplements the ticketing system whenever possible.

Link to Scoring Rubric

3.8 Does your service have annual goals (targets) of achievement regarding the quality of the service provided?

No

If yes, describe the annual quality goals (targets) and indicate if the service achieved those goals (targets). Please provide evidence, if possible, in <120 words. If no, please explain.

Because our goal is to provide quality services and responses to service tickets we do not have an established target other than a 100% response rate. That goal isn't always achievable due to resource constraints. We currently have no process other than informal communication between team members and clients to measure success in meeting our target of full satisfaction and we realize that we cannot always meet everyone's full expectations. Management of expectations is one part of the project management process that occurs early in the review of any request for technology support.

Link to Scoring Rubric
3.9 Does your service have annual goals (targets) of achievement regarding the quantity of service provided?

No

If yes, describe the annual quantity goals (targets) and indicate if the service achieved those goals (targets). Please provide evidence, if possible, in < 120 words. If no, please explain.

We have not established annual goals for new developments in technology, number of projects completed nor service desk ticket clients served. Our ability to assign resources to meet goals are subject to the demands of entities external to PEMSA, for example, CSU Chancellors Office initiatives and ongoing maintenance of existing systems such a PeopleSoft Campus Solutions. We do create proposed project lists and prioritize the projects based upon areas of greatest need or mandate. The prioritization of projects and progress is not always fully within our control.

6. Efficiency of Service (cost effectiveness)

Link to Scoring Rubric

4.1 Using the spreadsheet provided for all employees in your department, please distribute salaries of individuals across all services provided to reach an educated or reasonable estimate of the cost of providing the service.

10000

Attach your allocated spreadsheet here.
PEMSA Technology-Student Data Mgmt-Imaging.xlsx

Link to Scoring Rubric

4.2 Using the spreadsheet provided, please distribute your department's annual operating expenses across all services provided to reach an educated or reasonable estimate of the cost of providing the service.

0

Link to Scoring Rubric

4.3 Using the spreadsheet provided, please distribute the square footage of work space across all services provided to reach an educated or reasonable estimate of the use of this resource.

16

Attach your allocated spreadsheet here.
PEMSA Technology-Student Data Mgmt-Imaging.xlsx

Link to Scoring Rubric

4.4 During the last three years, have you adopted any measures to improve the efficiency (cost effectiveness) of providing this service (e.g. reducing salary costs, operating expenses or use of space, or increased output without increasing cost. Etc.)?

No

If yes, please describe the measures in < 120 words. If this is a new service introduced over the past three years, please indicate. If no, please explain.

The Technical Support function is almost entirely within the scope of duties of the AVP, PEMSA Technical Support and Student
Data Management. The service require no dedicated space nor additional staffing. Operating expenses, when needed, are provided from the budget of the VP, PEMSA. The AVP may call upon resources from ITS (project managements, service desk, etc) to support specific requests.

4.5 What idea(s) do you have for improving the efficiency (cost effectiveness) of this service within existing resources (e.g. restructuring, merging, outsourcing, ways to cut costs, technology, etc.)? Please describe those ideas in <120 words.

PEMSA supports this service effectively and with the minimum use of resources. We believe that the service is integral to our planning for the use of technology and the integration of new and existing technologies and the varied operating system platforms in existence on campus.

4.6 What idea(s) do you have for improving the efficiency (cost effectiveness) of the service if additional resources were provided. Please describe your idea(s) in <120 words.

Because this role focuses primarily on coordination, additional resources would involve setting aside more of the AVP’s time (or someone on his staff) to handle additional workload of technology projects, or short-term assignments (such as workstation upgrades).

4.7 Do you have any plan(s) to improve the efficiency (cost effectiveness) of this service in the next 1-2 years (e.g. reducing costs, increasing productivity, etc.)?

No

If yes, please specify whether these plan(s) involve reducing salary costs, operating expenses and/or use of space. Please describe your plan(s) in <120 words. If no, please explain.

See 4.6; this function currently accounts for only a small portion of the AVP’s time.

4.8 Please describe the estimated output for this service for fiscal year 2011-12, quantify if possible (e.g. volume, service tickets resolved, people serviced, appointments, etc.) in <120 words.

PEMSA has approximately 350 computers and printers operating on the university network. This service advises on the purchase, installation, configuration and networking of these devices. We coordinate with the ITS USS to schedule their services for our equipment and their configuration of our systems. The AVP will monitor PEMSA calls for service and the responsiveness of the Service Desk, escalating an average of two requests for service per month.

7. Other

5.1 Are you aware of services similar to this one that are being provided by another department at CSU East Bay?

No

If yes, please provide a list of those departments. How are the services described here similar or different? Please describe in < 60 words.

The Division of A&F includes campus ITS units. There are several groups within ITS that provide services for users across the
University. The PEMSA technology group assures a continued dedicated focus on systems that impact student services and student data. The grouping of PEMSA services provides for the continuing integrated functional support which calls upon ITS for infrastructure needs.

**Link to Scoring Rubric**

5.2 Is there anything unique or distinctive about your service? Please describe what is unique or distinctive in <120 words.

In selection, configuration and appropriate use of technology. We are dedicated to the support of our division and our mission of being led by our functional experts and supported by central ITS services when the need is defined. Maintaining technology support within the division increases our efficiency and responsiveness to other PEMSA units and ensures a coordinated approach to the use of shared divisional resources. It is a common practice at universities to have this kind of support for the functions associated with student admissions, financial, and registration because of the specialized software and hardware associated with these functions as well as privacy and security requirements.

**Link to Scoring Rubric**

5.3 Are there any additional things about this service that you would like the task group to know? Please describe/explain in <250 words.

Technical support is part of a larger unit, PEMSA Technology Support and Student Data Management. During the implementation of university enterprise projects such as PeopleSoft Student Administration and enterprise document imaging, the Vice President of PEM(SA) and the Chief Information Officer (CIO) determined that the best model for support these systems was from the functional team level within the division that uses the systems. The services provided continue to follow this model. PEMSA maintains a technical support service that interfaces and, at times, integrates with services provided by central ITS. It remains true that we are in the best position to make decisions on the technologies procured for PEMSA, the hardware, desktop software and specialized application necessary to our critical administrative business processes that serve students directly. Further, this service works to protect the PEMSA technology platform by analyzing integration points and software compatibility with existing products before purchases or changes are made. While others in the university provide similar services on a university-wide scale, this service remains a key checkpoint in the procurement and technology evaluation process. We maintain a division inventory and recommend when specific equipment or software that has exceeded its expected lifetime should be refreshed. In some cases this involves coordinating the desktop refresh process or on a larger scale, the replacement of major systems such as document imaging and room reservations. The AVP responsible for this service is an advocate for the division and is the designated liaison to the university’s centralized IT support structure.

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