

Transforming Services Delivery for Students Success

SDN Award Submission, July 26, 2015



Overview

The University of California, Berkeley is a globally recognized education brand with a reputation as a top tier academic and research institution. The same cannot be said for the online experiences campus community members have when they use the university's legacy student information systems. Over the years, core functional service areas have developed their own siloed systems catering to their expertise, creating a constellation of disjointed services lacking integration, and each having their own look and feel. While each of these systems is highly functional, the lack of centralization adversely affects 37,500 Berkeley students each year—as evidenced by survey results of “Ds” and “Fs” on satisfaction with core campus online services.

Project Objective

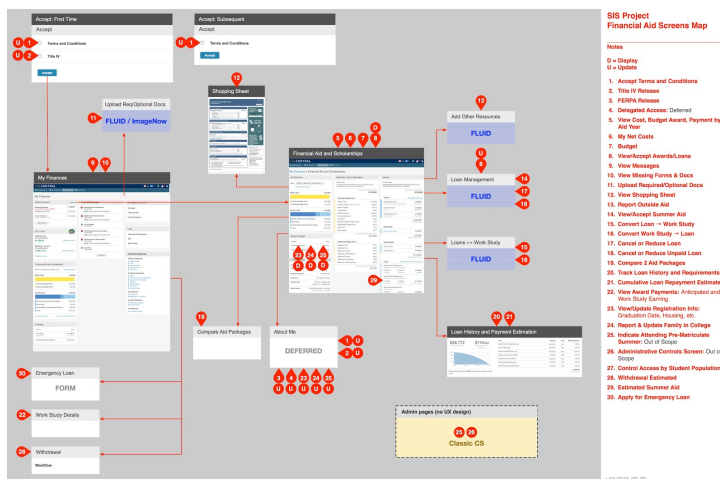
The University of California, Berkeley, is in the midst of a multi-year program to unify and transform services delivery for students, plus faculty, staff and parents; the Student Information Systems (SIS) Project. The scope is broad and complex. It includes replacing and reimagining services delivery for Admissions, Student Records, Financial Aid, and Billing, plus Advising of academic planning and enrollment. The primary target audience are the University's over 37,000 undergraduate and graduate students. From a design perspective, our aim is to demystify and support the academic journeys of first-generation and low-income students that have limited resources and experiences navigating a complex set of academic, administrative and financial activities, i.e. a focus on supporting students success with transformational experiences.

Use Case: Financial Aid

A small use case, within the larger project, is the redesign of UC Berkeley's Financial Aid system. The before images below show a menu driven and very complex set of screens that do not naturally provide a flow for understanding and decision making.

	Fall	Spring	Annual Totals
Housing Type	Residence Hall	Residence Hall	
Tuition and Fees	\$6,939.00	\$6,939.00	\$13,878.00
Personal Expenses	\$1,009.00	\$1,009.00	\$2,018.00
Transportation	\$267.00	\$267.00	\$534.00
Housing	\$7,194.00	\$7,194.00	\$14,388.00
Food	\$517.00	\$517.00	\$1,034.00
Books & Supplies	\$620.00	\$620.00	\$1,240.00
Subtotals	\$16,546.00	\$16,546.00	\$33,092.00
Other Costs			
Grand Totals	\$16,546.00	\$16,546.00	\$33,092.00

The UX team also created a map of how the information and logic of the different requirements would flow together. As a result of that map, it was decided that there would be two levels to the financial area of CalCentral: a dashboard overview, and a detailed look



into a student's financial aid package by aid year. On each page, different "cards" in the three columns would provide data, information and context.

New Design

The team fleshed out initial designs based on those three mental categories, then began iterating on them during an intensive

three-week design "sprint." Because student response was so integral to getting the designs right, the UX team worked to involve students at as many levels as possible. Undergrad and graduate students were hired onto the UX team itself to provide ongoing feedback as well as design—truly putting the employees and the customers together. The UX team also visited the student service center multiple times to test potential designs at different stages of fidelity and get immediate feedback from students.

CalCentral
My Dashboard My Academics My Finances My Campus

My Finances » Financial Aid and Scholarships

Aid Year Selector

Aid Year: 2015 - 2016

Semester: Fall, Spring, and Summer

Type: Fall and Spring Summer 2016

Messages

- Hold: Financial Aid Disbursement**
Financial Aid, Aug 19
No Action: Pending receipt of scholarship funds
- Parent 2014 W2 form**
Financial Aid, Jul 19
Status: Action required, submit document
- Verification Dependent**
Financial Aid, Jul 17
Status: Action required, complete form
Aid Year: 2014-15
Your financial aid application for the 2014-15 academic year has been selected for Verification. Verification is a process required by the federal and California state governments that is intended to improve the accuracy of the information submitted on the Free Application for Federal Student Aid (FAFSA) or the Cal Dream Application. Please complete (LRC supplied, in message text body) and provide the requested documentation as soon as possible. Student may be submitting Professional judgement forms for budget and income increase.
[Complete Form](#)
- Free Application for Federal Student Aid (FAFSA)**
Financial Aid, Apr 16
Status: No action required, document reviewed and processed.

Financial Aid & Scholarships Profile

We take many factors into consideration when determining your funding package. Updates made elsewhere to your personal information may affect the amount of aid provided to you.

[Aid Package Factors](#) [Show](#)

[Privacy and Access](#) [Show](#)

[Terms and Conditions](#) [Show](#)

Estimated Cost of Attendance

Your budget is the estimated average and reasonable cost of completing an academic year at UC Berkeley.

[View Term Amounts](#)

Standard Budget	Cost
Tuition / Fees	\$ 18,000.00
Housing / Meals	\$ 12,000.00 OFF CAMPUS
Books / Supplies	\$ 2,000.00
Transportation	\$ 400.00
Health Insurance	Waived
Personal Expenses	\$ 1,600.00
Loan Fees	\$ 200.00
Education Abroad Program Fees	\$ 1,000.00
Global Edge Program Fees	\$ 1,000.00
Other Fees	\$ 1,800.00
Miscellaneous	\$ 2,000.00
STANDARD BUDGET TOTAL \$ 40,000.00	
Estimated Cost of Attendance	\$ 40,000.00

Funding Sources

Financial aid awards are offered to meet your need up to your student budget (estimated cost of attendance).

Estimated Cost of Attendance	\$ 40,000.00
Gift Aid (MONEY YOU DONT REPAY)	- \$ 18,000.00
Net Cost (YOUR ESTIMATED COST)	\$ 22,000.00

[Add Additional Resource](#)

Gift Aid

Graduate Division Grant	FINANCIAL AID AND SCHOLARSHIPS	\$ 10,000.00	ESTIMATED	\$ 7,000.00	PARTIALLY PAID
Department Grant	GRANT	\$ 4,000.00	CONFIRMED	\$ 4,000.00	PAID
CSI Fee Remission	FEE REMISSION	\$ 7,000.00	CONFIRMED	\$ 7,000.00	PAID
GIFT AID TOTAL		\$ 18,000.00			

Unsubsidized Loans [Update Loans](#)

Unsubsidized Loan	FEDERAL DIRECT LOAN	\$ 20,500.00	OFFERED	\$ 0.00	NOT PAID
UNSUBSIDIZED LOANS TOTAL		\$ 20,500.00			

Funding Sources Grand Total

\$ 38,500.00

Process

Design Tools and Methodologies

Platform Choice: The project chose CalCentral as the service experience delivery platform.



CalCentral is a lightweight integration platform launched in 2014 that staff developed to expose, repackage and present data, sourced from a number of legacy systems, and with the aim of informing, alerting, and supporting students' success.

Agile work for a Waterfall project: Getting rapid feedback on designs via prototypes, testing and design reviews is critical to meeting the project's objectives on time and with quality.

Service Design Disciplines: In addition to traditional user experience (UX) research, interaction and visual design methods, the CalCentral team invested time and effort in a number of service design methods to collect input including:

- Experience and journey mapping
- Service blueprinting
- Design workshops with students and business owners

End-user Advocacy: In a large project, design input can be dominated by the desires of functional and technical team members. It is critical that the voices and insights of end-users are discussed and actively included in all design discussions. Service designers bring great design value with their focus and perspective on how end-users needs are going to be met cross-functionally, and from an outside → in view-point, navigating complex academic and life decisions.

Show your work: post designs in a public hallway, early and often, so that functional and technical team members can see how their business processes are going to be realized and can critique.

Gathering customer insights

The team used a variety of user experience and service design methodologies, including:

- Persona and 1:1 interviews
- Surveys
- Design studio workshops
- Experience and journey mapping the “as is” experience and opportunity areas



Jennifer Georgevich @jen... 4d

#design workshop with #calsis ! Using #designthinking to improve @UCBerkeley financial aid and payments system



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Test the service concept

The team worked up several design ideas, mapped out the students' journey through Financial Aid and then tested assumptions and visual designs with many students, in 1:1 interviews and presenting to stakeholder student groups. Testing tools, like Silver Back, were also used to capture how students approached different tasks.

The Benefits of Design

On the customer

- One system, one place for students.
- Maximize agency and minimize hand-holding in the financial aid process.

- Demystify the process of receiving financial aid.
- Provide clarity and simplicity of use.

On the organisation

- Increase student self-service, and improve staff efficiencies by reducing the number of advising visits to the Financial Aid office.
- Positively impact Financial Literacy initiatives on campus
- Support student success factors through more effective communications and better decision tools

On the competition / market

- Good services experience are key to students' impressions of an institution and their alumni giving. Increasingly, students are sharing their experiences broadly on social media, and it is important that students service experiences are aligned with their world-class classroom experiences.

Effect

Cause and effect

CalCentral as a platform has been rapidly adopted on campus and rated highly by students as the defacto system to trust and use to navigate campus, with regular usage by 20-33,000 students each week. Benchmark data, however, for the legacy Financial Aid systems is a grade D for Learning and Usability using the Systems Usability Scale.

Scale of effect

The effect of CalCentral with the new SIS, which continue to impact the campus with the implementation of new functionality, are reduced lines at the service center, improved service experience by students and ability to solve their own problems. Additionally, staff can spend their time on more complex issues that are not easily resolved in a self-service manner. We are still at the early stages with this project and we are still collecting and measuring the true impact of our service design work.

UC Berkeley, SIS Project UX Team Members

Staff: Bernadette Geuy (Lead), Rachel Hollowgrass and Flint Hahn

Students: Molly Mahar, Shannon Chu, Drake Myers, Suliaman Haruna and Tiffany Qi