THE SERVICE DESIGN AWARD



Transforming Services Delivery for Students

University of California, Berkeley

1. Overview

Many student systems and a disjointed set of experiences The University of California, Berkeley, is in the midst of a very large business transformation initiative with the Student Information Systems (SIS)

Project. The core systems that serve Admissions, Student Records, Financial Aid, Billing, and Advising are being replaced, impacting over 37,500 students, ongoing. Core business units have developed their own siloed systems, 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 students and the staff that support them.

CalCentral as the unifying platform A core part of the strategy is to use CalCentral, a Berkeley-developed unifying platform. Launched in

2014, CalCentral delivers a personalized set of information, alerts and campus navigation tools with the aim of supporting students' academic success.

Financial Aid, a case study in service design

The SIS Project's UX team re-designed a menu-driven and complex financial aid system using service design tools and methods. The resulting solution presents budget information and funding sources on a single screen to support understanding and decision making. The design was created with lowincome and first generation college students in mind, and aiming to demystify and support their experiences navigating a complex institution.



2. Process

Journey mapping and student workshops

Your campus info....anywhere!

calcentral.berkeley.edu

classes / books

GPA / exams

status / alerts

(2) email / calendars

s bills / Cal 1 card financial aid

Mapping how students fund and pay for their education

Student Testing

Interviews and 1:1 usage testing

3. The Benefits of design

On students

One system, one place for all things student-related Agency and empowerment Clarity and simplicity of information and decision making

On UC Berkeley

Staff efficiencies for increases students self-service Positive impacts to Financial Literacy initiatives Supportins student success factors through improved communications and streamlined workflows

On the market

Improve students' impressions of an instution and alumni giving Compliment and enhance the institution's brand image through service excellence

4. Effect

M 14 🛐 4 🔥 🐣 😘 **CALCENTRAL** ★ My Dashboard My Academics \$ My Finances My Campus My Finances » Financial Aid and Scholarships Aid Year Selector **Estimated Cost of Attendance Funding Sources** Your budget is the estimated average and reasonable cost of Financial aid awards are offered to meet your need up to your Aid Year: 2015 - 2016 ▼ student budget (estimated cost of attendance). completing an academic year at UC Berkeley View Term Amounts Semester • Fall, Spring, and Summer \$ 50,000.00 - \$ 18,000.00 Gift Aid (MONEY YOU DON'T REPAY) Fall and Spring Standard Budget Summer 2016 \$ 27,000.00 Net Cost (YOUR ESTIMATED COST) \$ 18,000.00 \$ 12,000.00 Housing / Meals Shopping Sheet Learn more about Financial Aid Add Additional Resource RESIDENCE HALL \$ 2,000.00 Books / Supplies **Undergraduate Grant** Messages \$ 400.00 \$ 7,000.00 ESTIMATED A PARTIALLY PAID Defaulted Loans in Bankruptcy \$ 1,600.00 Federal Pell Grant Status: Action required, missing document \$ 200.00 **Education Abroad Program Fees** \$ 1,000.00 \$5,000.00 \$ 5,000.00 Eligible Non-Citizen Statement **✔** PAID CONFIRMED \$ 1,000.00 Global Edge Program Fees Status: Action required, missing document \$ 1,800.00 Undergraduate Scholarship **file Incomplete** \$ 2,000.00 Miscellaneous \$3,000.00 \$ 3,000.00 Financial Aid CONFIRMED ✔ PAID STANDARD BUDGET TOTAL \$ 40,000.00 GIFT AID TOTAL \$ 18,000.00 Status: Action required, missing document **Additional Budget** FAFSA Income or Asset Change Additional Fees \$4,000.00 Work-Study Find a Job | Convert to Loan Additional Food \$ 200.00 Status: Action required, missing document [Employer Name] Additional Housing No FAFSA \$ 2,000.00 \$ 1,000.00 \$ 400.00 Additional Living Expenses ACCEPTED **✔** PAID \$ 600.00 Additional Personal GIFT AID TOTAL Show More \$ 1,000.00 Additional Transportation \$ 2,000.00 Research / Travel Expenses \$3,000.00 ADDITIONAL BUDGET TOTAL Financial Status **Update Profile** Subsidized Loans Update Loans | Convert to Work-Study \$ 10,000.00 Federal Direct Subsidized Loan Changes in your personal information may effect the amount of \$ 9,000.00 \$ 50,000.00 **Expected Graduation** December 2016 Fall • Spring • Summer \$ 1,750.00 **Housing Type** Fall 2014 - Residence Hall **Record Access** anda Sheh (mother) - Authorized \$ 16,000.00 **Unsubsidized Loans Update Loans** Unsubsidized Parental Loan \$ 0.00

Cause and effect

CalCentral as a platform has been rapidly adopted on campus and rated highly by students as the defacto system 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 continues 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.



