

One-Stop Student Service Centre Program: Service Data Report

2/11/2022

Introduction

- As part of a series of research reports detailing research relevant to the OSSSC Program, this Report is focused on the service historically provided by the SFS, ES, and AS units, with specific focus paid to data that helps illustrate service volume and quality.
- The data included is not inclusive of all services provided for students by ORS. Rather, the Report focuses only on data related to services being considered for Linc integration (effort to limit scope).
- The service data reviewed will support the program by providing:
 - a baseline to support future assessment efforts;
 - insight into where service improvement opportunities may exist; and
 - insight into staffing levels needed to match consolidated service load levels.

| Section | Pages |
|---|----------------------|
| Executive Summary | 2-3 |
| Data | |
| Introduction | 4-6 |
| Enrolment Services <ul style="list-style-type: none"> • Scope • Email, Phone, Processing, Staffing, and Workload • Analysis | 7 8-12 12-13 |
| Admission Services <ul style="list-style-type: none"> • Scope • Email, Phone, Staffing, and Workload • Analysis | 14-15 15-18 19 |
| Student Financial Services <ul style="list-style-type: none"> • Scope • Email, Phone, Processing, Staffing, and Workload • Analysis ORS Totals | 20 20-24 24-25 |

| | |
|---|-------------|
| ORS Totals <ul style="list-style-type: none"> Email, Phone, Processing, and Staffing and Workload Analysis | 26-32 32 |
| Other <ul style="list-style-type: none"> UAIC, AskGryph, Web Analysis | 33 33 |

- If short on time, the analysis sections do a good job of capturing relevant take-aways from the data presented in the other sections.

Executive Summary

- Combining the front-line services for the ES, AS, and SFS units will result in the concentration of considerable service volume at The Linc. A likely scenario for integration would see the new one-stop responding to 84,000 emails and 18,000 calls per year, in addition to completing processing work.
- Luckily, our current service levels are fairly strong. A summary of key service metrics for email and phone are available in the table below.

| Account | Average Response Time (ART) | Highest Monthly ART |
|--|------------------------------------|-------------------------------|
| es@uoguelph.ca | 2.3 days | August: 5.8 days |
| admissio@uoguelph.ca | 2.3 days | June: 6 days |
| internat@uoguelph.ca | 4.25 days | January and October: 7.5 days |
| finaid@uoguelph.ca | 0.77 days | September: 1.4 days |
| accquest@uoguelph.ca | 0.66 days | May – 0.9 days |
| Phone Line | Average Queue Time | Abandonment Rate |
| ES main line (x58731) | 3:09 | 13.2% |
| AS main line (x58721) | 7:14 | 22.5% |
| SFS main line (58715) | 2:07 | 25.6% |

- Regarding email:
 - While only the SFS email accounts average below 2.0 business days for responses (our likely target), the majority are close and changes anticipated as a result of this program should help reduce them to goal levels.
 - Despite strong annual ARTs, opportunity exists to improve ART for our busiest months.
- Regarding phone service:
 - Average queue time is strong for both the ES and SFS main lines, with ES also boasting a strong abandonment rate.
 - Opportunity exists to improve AS average queue time and AS and SFS abandonment rates.
 - Although not depicted in the Table, opportunity also exists to improve service through expanding phone service hours to better resemble typical business hours.

- For the services being considered for Linc integration, the core staffing allotment (staff levels required for off-peak months) totaled an equivalent of 9.0 full-time staff (9.0 FTE). However, by consolidating the services being considered, efficiencies made available through matching peaks and pits (e.g. SFS and ES off-peak period aligning with AS peak period) would require only 8.0 FTE front-line staff (with one of those only dedicating half their time to front-line service tasks and the other half to management functions). Needed staffing level could be further reduced by employing a Confirmation of Enrolment (CoE) processing hack, to save another 0.5 FTE.
- Consistent with our current staffing models, periods of peak service load will require capacity to supplement our core staffing allotment. The volume at peak times is too significant to be managed without additional support. However, peak times are also temporary, so as to make additional core staffing levels inefficient. Solutions currently being employed to help manage front-line load at peak periods include:
 - hiring part-time staff that can be flexed to full-time for limited periods of time;
 - relying on back-office support; and
 - utilizing student staff who have some flexibility to increase/decrease hours as needed.
- The volume of questions students asked through AskGryph (almost 250 thousand in 2021) and the number of sessions (1.41 million) and unique users (843 thousand) that visited the admission section (admission.uoguelph.ca) of our website alone in 2021 illustrate the extent to which students regularly engage self-service options. Because of the sheer magnitude of student interactions with these platforms, even small increases in efficiency and/or capacity present significant opportunities for service improvement.

The Data

Introduction

Before investigating service data related to ES, SFS, AS and other relevant service providers, this report will briefly explain how various data inputs were compiled and what is actually being captured in instances where proxy data is used.

With respect to email data:

- Measuring the number of emails that went to a particular email address over a period of time was challenging in that not all emails were filed and those deleted were regularly lost after a set period of time. Thus, emails sent was exclusively used as a proxy for emails received throughout the service review.
- Average Response Time (ART) → There were two primary methods used to estimate email ART (defined as the amount of time between receiving and responding to an email): using proxy data and sampling.
 1. Proxy Data – Where there was another metric available that could be substituted in the place of email ART, this was done to limit the need for sampling (time intensive).
 - E.g. For the ES team, because email and Confirmation of Enrolment response times tend to be fairly consistent (staff try to keep the wait for both at similar levels), CoE response time (as tracked through GryphForms) was used as a proxy for ART for the es@uoguelph.ca email.
 2. Sampling – For units where a convenient proxy was not available, staff sampled sent emails from numerous points in the year (e.g. 4 windows of time/month), identifying ART from the email chain.

With respect to phones:

- Tracking phone volume was more direct (once we figured out that CCS emailed out reports related to each of our Contact Centre numbers each day).
- The App Summary and CSQ Reports combine to provide us a wealth of data, including:
 - Total Calls Presented (all calls to a specific number, including those made outside business hours)
 - Calls Presented (all calls that were directed to a queue to speak to an agent; includes Calls Handled and Calls Abandoned)
 - Calls Handled (all calls where our agent engaged with the caller)
 - Calls Abandoned (all calls where the caller hung-up before speaking to the agent)
 - Average Queue Time (average amount of time callers spent in the queue (includes the time they spend navigating the queue))
 - Average Talk Time (average amount of time callers spent speaking to agents)
- This level of data is not available for phones not linked to the Contact Centre software (most desk phones), preventing us from collecting data for some phones that would be of interest (e.g. Admission Services' line for campus tour inquiries: x58712).
- Additionally, even for phones linked to the Contact Centre system, data availability was limited in cases where CCS was not relied upon to generate monthly and annual reports (attempting to limit ask on CCS and instead relying on tabulation of available daily reports).

With respect to processing:

- Processing responsibilities exist for both the ES and SFS front-line staff. However, the specific nature of these activities differs for each team. Thus, processing-related data inputs will be explained in the *Scope* area of each unit's data review.

With respect to staffing distribution:

- Staffing distribution refers to the amount of staff time dedicated to a particular area of responsibility and was generated for each unit through consultation with front-line staff, their direct supervisors, and more senior management.
- In most cases, "responsibility schedules" and staff estimates of time spent on various tasks were combined to inform the estimates.
- For some teams, staffing distribution is fairly consistent throughout the year (while total loads change, the relative loads of constituent responsibilities, and the staffing assigned to them, are fairly consistent). For other teams, distribution changes significantly based on time of year (e.g. more/less time dedicated to email/phone vs. processing work).

With respect to workload:

- "Workload" is a created metric, designed to reflect the actual amount of work associated with service.
- To calculate workload, you must assign a weighting (or workload factor) to various actions, which are reflective of the time each action takes.
 - E.g. If answering an email takes an average of 2 minutes and handling a phone call takes an average of 4 minutes, the workload factor for a phone call is twice that for an email.
- When calculating total workload over a given period of time, each activity that happens (email, phone, or processing) can be multiplied by its workload factor to provide a realistic representation of the total workload over that period of time.
- Compared to just adding together the number of actions taken by staff (responded to X emails, answered Y calls, and processed Z things), calculating workload allows you to more accurately see workload volume.
- Workload factors were calculated in two ways:
 - by comparing the actual time various actions take (e.g. average AS phone call = approx. 3 minutes), and
 - by comparing the staffing load required to facilitate a specific number of actions for a responsibility area over a period of time.
 - e.g. if we need an average of 1.5 full-time equivalent (FTE) staff to process an average of 1100 CoEs a month and we know we need 1.5 FTE to answer an average of 2200 emails a month, we can calculate that producing a CoE takes twice as much time as answering an email. Thus, the workload factor for CoE production should be twice that of responding to an email.
- While workload factors and workload is great for comparing month to month service load, a limitation of the metric is that it cannot account for the particular abilities of staff members. A strong staff member may be able to produce X amount of email responses in a given time, causing it to appear that responding to an email from the account that they service takes less time than may be the reality (for an average employee). Conversely, a staff member that struggles in a particular area could lead to the workload factor for that area being over-weighted, as it is appearing it takes more time than perhaps needed to complete a task. This limitation is muted as teams get larger.

- The following workload factors were calculated for ORS front-line tasks:

| Task | Workload Factor |
|--------------------------------------|-----------------|
| Admission Services | |
| * Responding to admissio@ email | 1.0 |
| * Responding to internat@ email | 1.0 |
| * Responding to find.yourself@ email | 1.0 |
| * Answering x58721 phone call | 2.0 |
| Enrolment Services | |
| * Responding to es@ email | 1.3 |
| * Answering x58731 phone call | 2.0 |
| * Processing CoE | 2.75 |
| Student Financial Services | |
| * Processing accquest@ email | 1.15 |
| * Processing finaid@ email | 1.9 |
| * Answering x58715 phone call | 2.5 |
| * OSAP processing | Not available |

Table 1 - Workload Factors

- Additional information about how each of these workload factors was calculated is available upon request.

Enrolment Services

Scope

Responsibility for Enrolment Services (ES) front-line staff can be loosely grouped into three categories: email management; phone support, and processing (e.g. producing and sending Confirmation of Enrolment letters).

- Email Management
 - While a number of email addresses exist within ES as channels for service for students (e.g. transcript@uoguelph.ca, undergradconvocation@uoguelph.ca, gradconvocation@uoguelph.ca, academicrecords@uoguelph.ca, etc.), only the main ES email (es@uoguelph.ca), that is handled by the front-line staff, was considered for initial Linc integration.
 - Students are directed to email es@uoguelph.ca for general ES-related inquiries and to submit forms related to various processes (e.g. course waiver process). Thus, some emails coming into this address require some measure of processing and response on the part of the front-line agent, while others simply require informational responses.

- Phone Service
 - Similar to email, a variety of phone number exist through which students can access ES services. In addition to the main ES number (x.58731), numbers also exist specifically for grad and undergrad convocation and for transcripts.
 - Consistent with the approach to email accounts, data was only reviewed for the main ES line, as it was the only line considered for initial Linc integration (and it is the only line detailed data is available for).

- Processing
 - While significant processing activities happen as a result of staff managing the main ES email (e.g. course waivers), those activities are captured in the time spent on email.
 - A significant source of staffing time not captured by email management is the production of Confirmation of Enrolment (CoE) letters, for which orders come in through a GryphForms. Thus, data for CoE production is also shared below.

- Staffing
 - While ES front-line staff occasionally engage in overtime, that overtime is most commonly taken as lieu time, rather than paid out, resulting in no net impact on annual staffing level.
 - The ES front-lines have also historically received back-office support at peak periods, including: phone and in-person coverage over lunches; evening work by management; the shifting of CoE letters to the back-office; the increase of PT staff to FT; etc. However, while necessary to deal with service load spikes, the limited timeframe of this help doesn't result in meaningful changes to annual staffing and these support measures were required to a lesser extent for the 2021 year than for previous years.

Email

- Below you will see data related to es@uoguelph.ca email load and average response time.

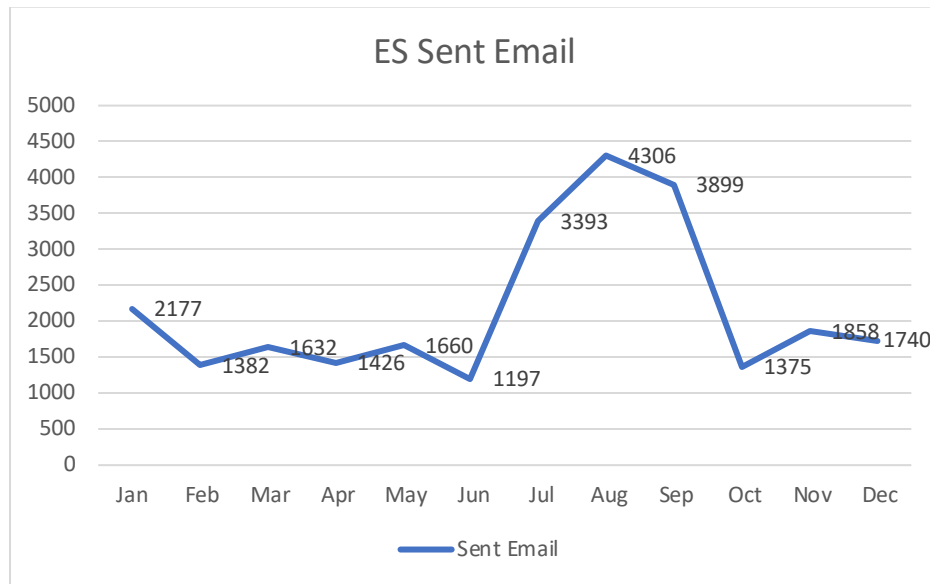


Figure 1 - ES Sent Email

| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Total | Mon. Avg. |
|------------------|-------|------|------|------|------|------|-------|-------|-------|------|------|------|-------|-----------|
| es@uoguelph.ca | 2177 | 1382 | 1632 | 1426 | 1660 | 1197 | 3393 | 4306 | 3899 | 1375 | 1858 | 1740 | 26045 | 2170 |
| % of monthly avg | 100.3 | 63.7 | 75.2 | 65.7 | 76.5 | 55.2 | 156.3 | 198.4 | 179.6 | 63.4 | 85.6 | 80.2 | | |
| ART | 1.6 | 3.0 | 2.5 | 1.6 | 2.0 | 1.0 | 3.6 | 5.8 | 2.1 | 1.1 | 0.8 | 2.2 | | 2.3 |

Table 2 - ES Email Data

- As can be seen in the data:
 - Email volume for the months of July-September accounts for close to half of all annual volume (approx. 45%).
 - Of the remaining months, volume in January is close to the monthly annual average, while all other months fall below average.
 - ART peaks generally correspond with service load peaks, with the exception of September, where ART stayed close to average, despite email volume.

Phone

- Data related to the main ES phone line (x58731) is provided below.

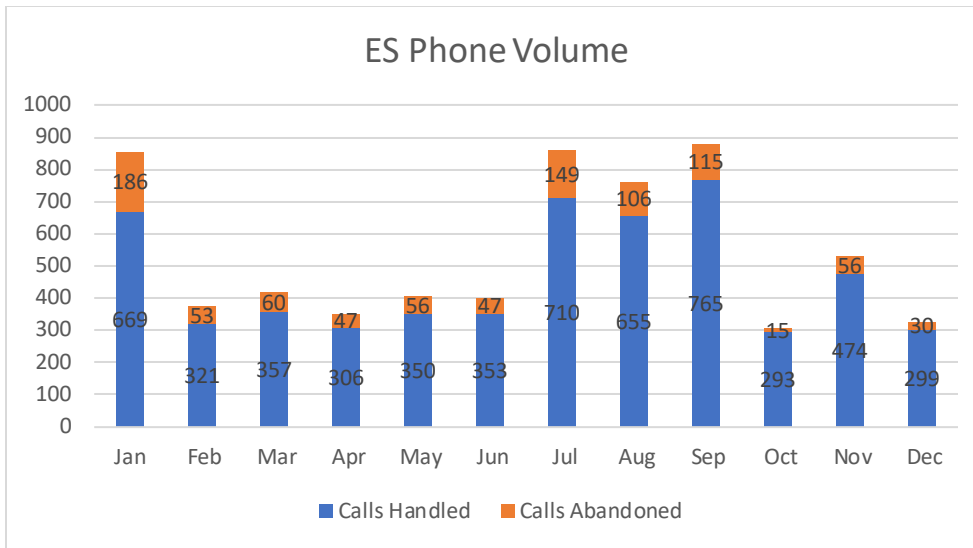


Figure 2 - ES Phone Volume

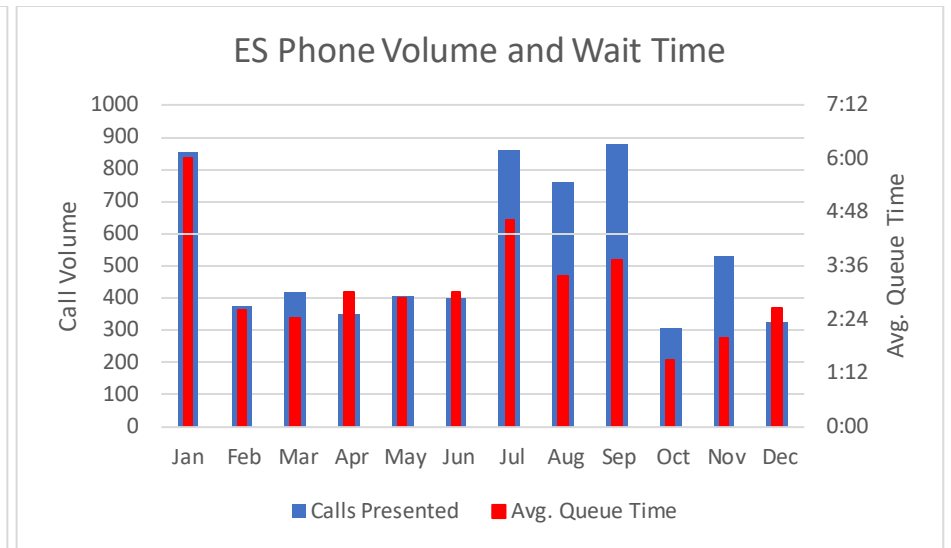


Figure 3 - ES Phone Volume and Wait Time

| x. 58731 | Jan | Feb | Mar | Apr | May | Jun | July | Aug | Sep | Oct | Nov | Dec | Total | Mon. Avg. |
|-------------------|------|------|------|------|------|------|------|------|------|------|------|------|-------|-----------|
| Calls Presented | 855 | 374 | 417 | 353 | 406 | 400 | 859 | 761 | 880 | 308 | 530 | 329 | 6472 | 539.3 |
| Calls Handled | 669 | 321 | 357 | 306 | 350 | 353 | 710 | 655 | 765 | 293 | 474 | 299 | 5552 | 462.7 |
| Calls Abandoned | 186 | 53 | 60 | 47 | 56 | 47 | 149 | 106 | 115 | 15 | 56 | 30 | 920 | 76.7 |
| Abandonment Rate | 21.8 | 14.2 | 14.4 | 13.3 | 13.8 | 11.8 | 17.3 | 13.9 | 13.1 | 4.9 | 10.6 | 9.1 | N/A | 14.2 |
| Avg. Queue Time | 6:00 | 2:36 | 2:25 | 3:02 | 2:53 | 3:01 | 4:38 | 3:23 | 3:45 | 1:29 | 1:59 | 2:40 | N/A | 3:09 |
| Average Talk Time | 2:31 | 2:50 | 3:04 | 3:05 | 2:44 | 2:58 | 2:49 | 3:06 | 3:53 | 3:35 | 3:06 | 2:45 | N/A | 3:02 |

Table 3 - ES Phone Data

- As can be seen in the data:
 - ES phone volume largely reflects email volume, with the months of July-September accounting for approx. 39% of calls received throughout the year.
 - Interesting, a January load spike is present on phones to a greater extent than seen on email.
 - Calls abandoned (data), abandonment rate (data), and average queue time (data and 2nd chart) correlate with volume through the first half of the year. From mid-summer onward, service quality metrics generally improved (likely a product of changes to the ES full-time staffing compliment) and correlation looks to still exist.

Phone Service Attempts Outside Open Hours

- Data provided by the daily App Sum report and more detailed individual phone call analysis through CCS allow us to identify how many calls are coming in outside of current phone operation hours.

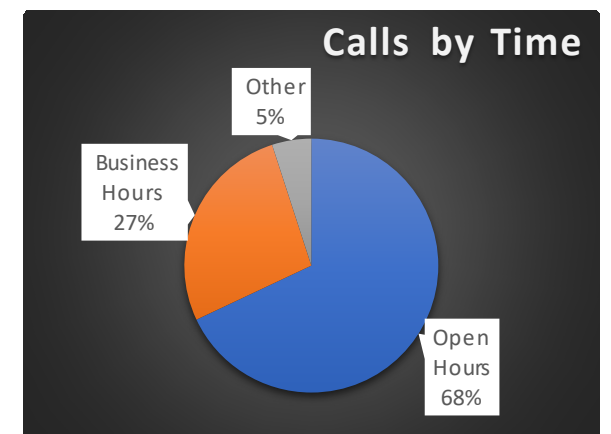


Figure 4 - ES Calls by Time

- As can be seen in Fig. 4, a significant portion (27%) of all attempted calls come in between 8:30 a.m. and 1:00 p.m., while attempted calls outside regular business hours are relatively low.

Processing

- Data related to CoE production is detailed below.

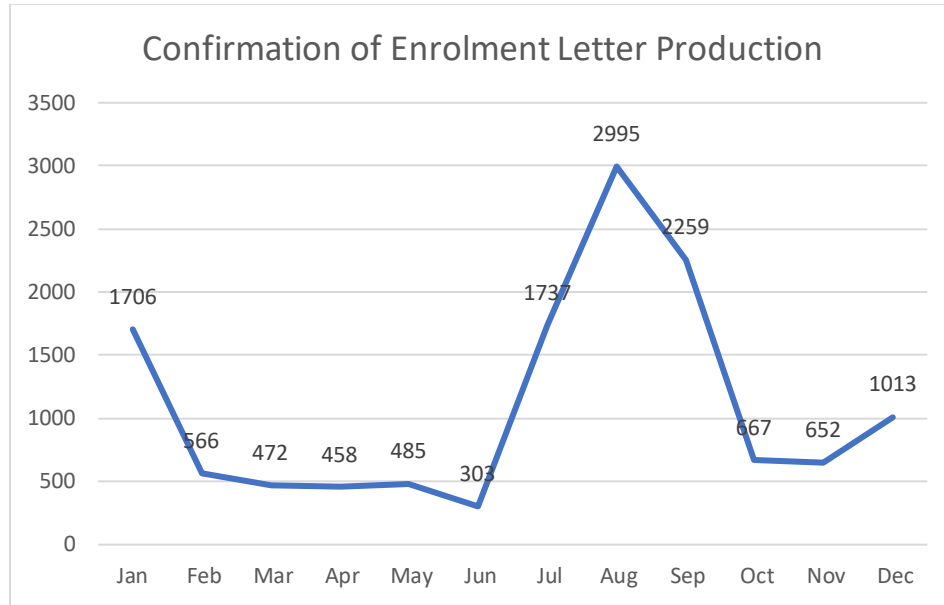


Figure 5 - CoE Production

| CoEs | Jan | Feb | Mar | Apr | May | Jun | July | Aug | Sep | Oct | Nov | Dec | Total | Mon. Avg. |
|------------------|-------|------|------|------|------|------|-------|-------|-------|------|------|------|-------|-----------|
| Number | 1706 | 566 | 472 | 458 | 485 | 303 | 1737 | 2995 | 2259 | 667 | 652 | 1013 | 13313 | 1109.4 |
| % of monthly avg | 153.8 | 63.7 | 75.2 | 65.7 | 76.5 | 55.2 | 156.3 | 198.4 | 179.6 | 63.4 | 85.6 | 80.2 | N/A | N/A |
| ART | 1.6 | 3.0 | 2.5 | 1.6 | 2.0 | 1.0 | 3.6 | 5.8 | 2.1 | 1.1 | 0.8 | 2.2 | N/A | 2.3 |

Table 4 - CoE Production Data

- As can be seen in the data:
 - Consistent with phone and email load, CoE letter load is highest in January and July-September, with the July-September load accounting for approximately 38% of all CoEs produced throughout the year.
 - ART for CoE production generally trends down (relative to volume) from September 2021 onward (January cell is January 2022 data).
 - This trend corresponds with the implementation of a new CoE production process that allows CoEs to be produced in significantly less time. Moving forward in this Report, this new production process will be called the Batch Method (BM).

Staffing Distribution

- The ES front-lines have a staffing contingent of 3 FT and 1 PT staff member, for an approximate FTE of 3.5.

- Estimated staff load on each responsibility can be broken down as seen in Table 5.
- Using the recently created “Batch Method” of CoE processing, undergrad and grad letters can be completed in half a day. However, as there are currently only certain staff members with the capacity to produce letters using the new method, it will be indicated where this method is being included in staff distribution and workload data.

Staffing with Traditional CoE Production

| Task | Load (FTE) |
|-------------------|------------|
| Phone | 0.5 |
| Email | 1.5 |
| Undergrad Letters | 1.0 |
| Grad Letters | 0.5 |
| Total | 3.5 |

Staffing with CoE Production via BM

| Task | Load (FTE) |
|----------------------------|------------|
| Phone | 0.5 |
| Email | 1.5 |
| Undergrad and Grad Letters | 0.5 |
| Total | 2.5 |

Table 5 -ES Front-line Staffing Levels, by CoE Prod. Method

Workload

- This section includes data related to the cumulative workload associated with ES front-line staff responsibilities. As noted in the Introduction section, workload is calculated by creating a workload factor for each service activity, multiplying it by the number of each activity that happens, and adding the workload number for each activity.

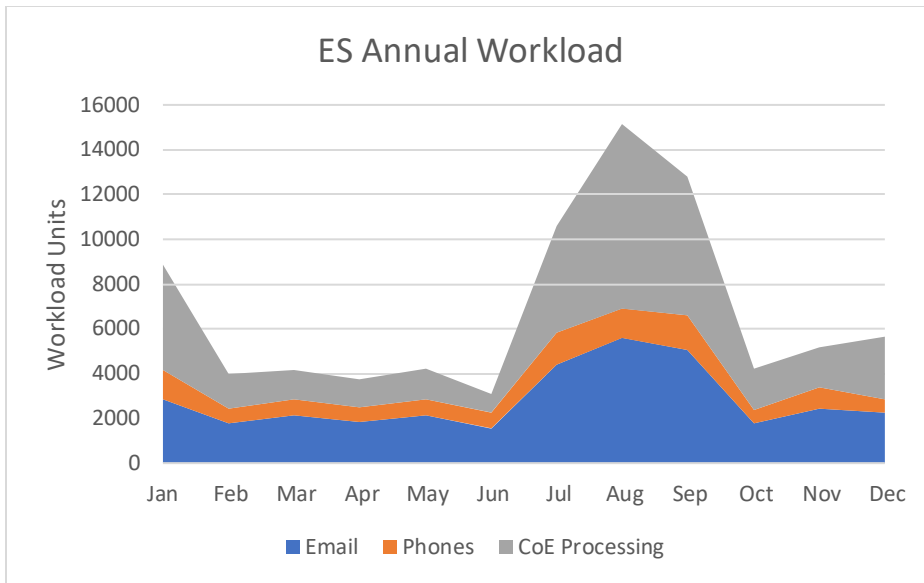


Table 6 – ES Annual Workload

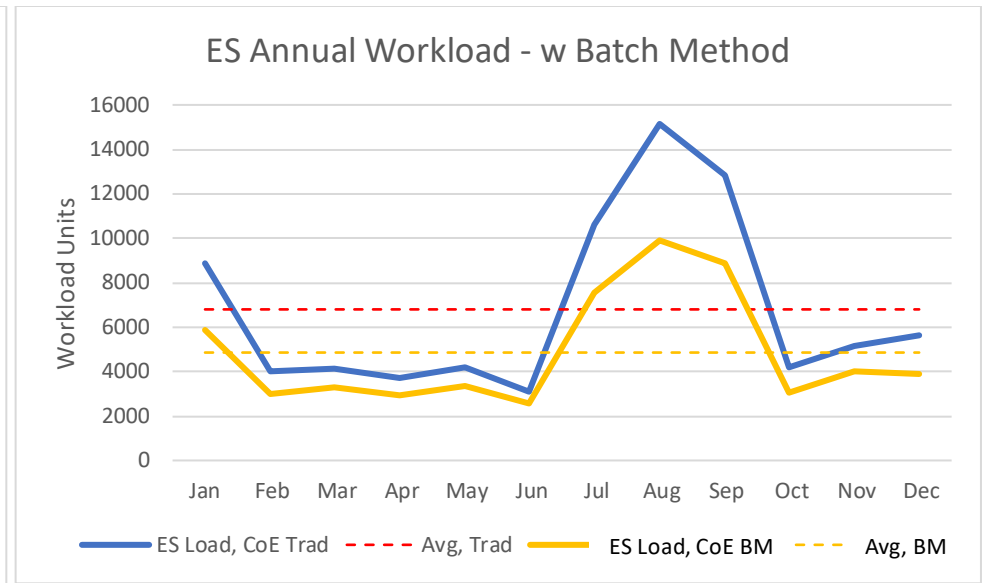


Table 7 – Annual Workload with BM

| | Jan | Feb | Mar | Apr | May | Jun | July | Aug | Sep | Oct | Nov | Dec | Total | Mon Avg |
|---------------|-------|------|------|------|------|------|-------|-------|-------|------|------|------|-------|---------|
| Workload | 8860 | 3995 | 4134 | 3725 | 4192 | 3095 | 10608 | 15144 | 12811 | 4208 | 5156 | 5646 | 81573 | 6797.8 |
| % of Average | 132.8 | 59.0 | 61.2 | 54.9 | 61.9 | 45.9 | 156.9 | 220.9 | 187.6 | 61.0 | 75.8 | 82.1 | N/A | N/A |
| Workload (BM) | 5874 | 3005 | 3308 | 2924 | 3343 | 2565 | 7568 | 9903 | 8858 | 3041 | 4015 | 3873 | 58276 | 4856.3 |

Table 8 - ES Workload Data

- As can be seen in the data above:
 - The flow of total workload closely resembles that for its constituent phone, email and processing activities (as it should), with January and July-September being by far the busiest times of year, accounting for over 46% of total work done during the year.
 - During the busiest month (August), 4.8x more work is done than the slowest month (Jun).
 - Each staff member produces approx. 1950 workload units/month (avg. approx. 6.8k wu/month/3.5 FTE)
 - Implementing the Batch Method for CoE production results in a 28% reduction in overall workload volume.

Analysis

- Overall, service quality for the ES team is quite strong!
 - Average response time for the es@uoguelph.ca account is only slightly higher (2.3) than a potential target of an average of sub-2 business days for ART and ART only spikes to problematic levels for the months of August and September, when volume has historically caused response times to balloon.
 - On phones, the ES main line has the strongest abandonment rate (13%) across all our phone lines, only really sneaking up during the aforementioned August-September spike.

- A significant portion (27%) of all calls to the ES main line come in between 8:30 a.m. and 1:00 p.m. each day. While this percentage is lower than the corresponding percentage for the AS main line (indicating that current students are learning our pandemic-era contact methods), an opportunity still exists here to better serve students by resetting phone hours to more closely reflect the business day.
- The months of January and July-September contain 46% of all ES front-line workload, meaning that only 54% of total annual workload is spread over the other 8 months of the year. Thus, there is likely capacity among the ES front-line staff to take on additional service during these off-peak months. This data driven insight corresponds with feedback provided by ES management and reflects the elimination of historical responsibilities (ID cards, payments, in-person line-ups) that required significant time.
- The Batch Method presents an awesome opportunity to better utilize ES front-line staff time, as it appears to save 1.0 FTE in workload. Equipping other front-line staff with the capacity to employ this method should be prioritized in The Linc.

Admission Services

Scope

Responsibility for Admission Services (ES) front-line staff can be loosely grouped into two categories: email management and phone support.

- Email Management
 - While only the admissio@uoguelph.ca email address is currently handled by the AS front-line, a number of AS emails were considered for Linc integration and data was collected for each of these accounts. Details for each account are presented in Table 9.

| Email | Details |
|---------------|--|
| admissio | <ul style="list-style-type: none">• Main AS email address currently managed by AS front-line staff. |
| applicant | <ul style="list-style-type: none">• Main email address for “105” applicants (students who are not currently attending an Ontario highschool full time).• Questions have potential to need more nuanced answers.• Currently handled by Applicant Processing Coordinators. |
| internat | <ul style="list-style-type: none">• Email for prospective international highschool applicants.• Content tends to be more general (do you offer X? How much does school cost?) with answers commonly being available on the website.• Currently handled jointly by IR&A student and FT staff. |
| intapps | <ul style="list-style-type: none">• Email for international applicants.• Tends to receive questions specific to particular applications and also currently handled jointly by IR&A student and FT staff. |
| find.yourself | <ul style="list-style-type: none">• Recently created as alternative location for recruitment related emails (significant overlap with admissio account), due to concerns about AS front-line workload and to enable a more recruitment-oriented response. |
| transferinfo | <ul style="list-style-type: none">• Email for all transfer student-related inquiries. |

Table 9 - AS Email Accounts

- Phone Service
 - Similar to email, a variety of phone number exist through which students can access AS services. In addition to the main AS number (x.58721), numbers also exist specifically for international highschool students (x55024), campus tours (x58712), and events (x.58713).
 - However, detailed monthly data is only available for Contact Centre extensions, resulting in data availability for the main AS extension only.
 - Additionally, even for the ES main extension, data availability was less than that for ES and SFS (fewer saved emails and less CCS involvement). This particularly impacted abandonment rate for the AS main line, where the average from a few months was relied upon for the annual average.
- Staffing
 - In addition to the work from the dedicated AS front-line staff member, work from “back-office” staff on the Admissions, Recruitment, and International Recruitment and Admissions teams is captured for services inData cluded in the review but not currently residing at the front lines.

- Similar to the ES front-lines, the AS front-line receives back-office support at peak periods. However, while this support is necessary to deal with service load spikes, the limited timeframe doesn't result in meaningful annual staff level changes (as reflected in FTE data).

Email Management

- Data on AS emails considered for Linc integration is identified below.

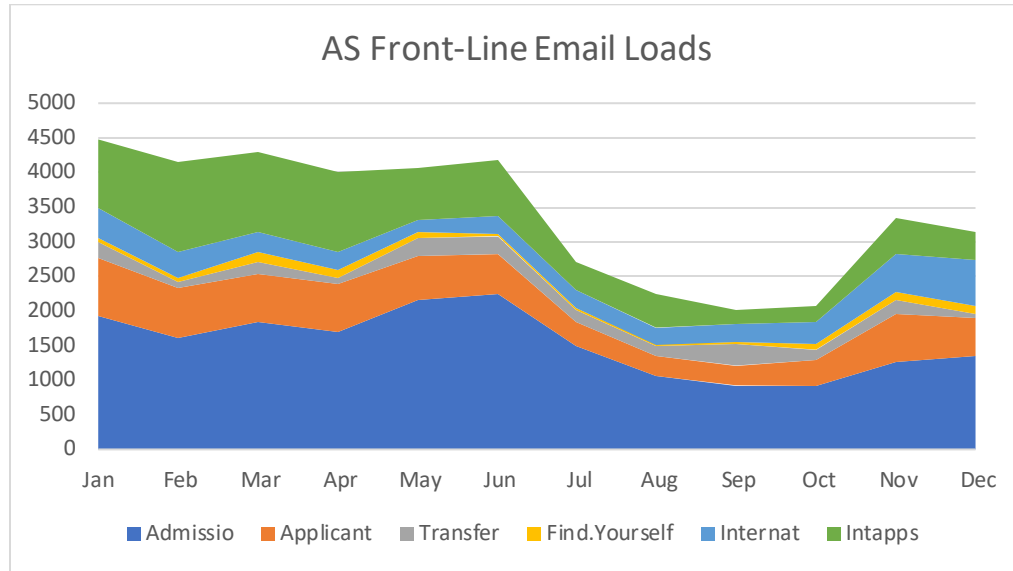


Figure 6 – AS Email Load

| Account | Jan | Feb | Mar | Apr | May | Jun | July | Aug | Sep | Oct | Nov | Dec | Total | Mon Avg |
|---------------|------|------|------|------|------|------|------|------|-----|-----|------|------|-------|---------|
| admissio | 1920 | 1623 | 1841 | 1702 | 2168 | 2244 | 1498 | 1050 | 926 | 928 | 1277 | 1338 | 18515 | 1542.9 |
| - ART | 1.5 | 2.5 | 3 | 3 | 4.5 | 6 | 2 | 3 | 1 | 0.5 | 0.5 | 0.5 | N/A | 2.3 |
| applicant | 837 | 702 | 696 | 680 | 612 | 576 | 346 | 309 | 286 | 360 | 687 | 552 | 6643 | 553.6 |
| - ART | 3.5 | 3 | 5.5 | 6 | 2.5 | 3 | 4 | 4 | 2 | 1.5 | 2 | 3.5 | N/A | 3.4 |
| transferinfo | 229 | 91 | 157 | 105 | 262 | 253 | 169 | 137 | 302 | 153 | 180 | 60 | 2098 | 174.8 |
| - ART | 4 | 1 | 3 | 1.5 | 2 | 3 | 3.5 | 4.5 | 2 | 4.5 | 2 | 2.5 | N/A | 2.8 |
| find.yourself | 61 | 68 | 148 | 92 | 97 | 48 | 19 | 13 | 35 | 81 | 131 | 112 | 905 | 75.4 |
| internat | 439 | 355 | 310 | 263 | 183 | 257 | 275 | 251 | 268 | 316 | 537 | 688 | 4142 | 345.2 |
| - ART | 7.5 | 6 | 2 | 2 | 3 | 4 | 2 | 6 | 2 | 7.5 | 6 | 3 | N/A | 4.3 |
| intapps | 991 | 1301 | 1141 | 1172 | 732 | 813 | 402 | 475 | 195 | 224 | 532 | 391 | 8369 | 697.4 |
| - ART | 7.5 | 6 | 2 | 2 | 3 | 4 | 2 | 6 | 2 | 7.5 | 6 | 3 | N/A | 4.3 |

Table 10 - Select AS Front-line Email Data

As can be seen in the data:

- January-June is the peak-season for the admissio@uoguelph.ca account, with July-October being relatively low and the November and December load increasing, though still landing at less than average monthly levels.
- ART for the admissio@uoguelph.ca account got progressively worse as peak season progressed and (as expected) seemed to correlate with load.
- A similar escalation in ART can be found for November through April for the applicant@uoguelph.ca address, as load continued to be higher than average throughout that period.
- ART for the internat@uoguelph.ca and intapps@uoguelph.ca email addresses was the highest of AS front-line accounts, likely owing to the PT and FT staff supporting those accounts having many competing responsibilities. The lack of correlation between load and ART also supports this multiple-responsibility hypothesis (load is not the sole cause of ART levels for those accounts).
- Admissio@uoguelph.ca (approx. 46%) and intapps@uoguelph.ca (approx. 21%) account for 2/3rds of all front-line emails (in the accounts explored).
- Find.yourself@uoguelph.ca load does not correspond with the admissio@uoguelph.ca load, indicating that the account was not being used to help manage load (as perhaps intended).

Phones

- Data related to the main AS phone line (x58721) is provided below.

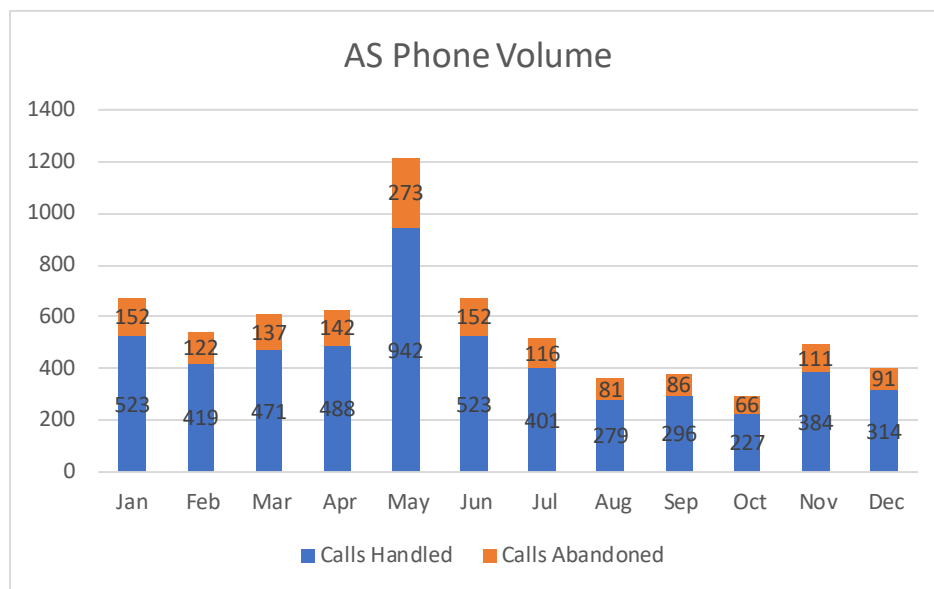


Figure 7 – AS Phone Volume

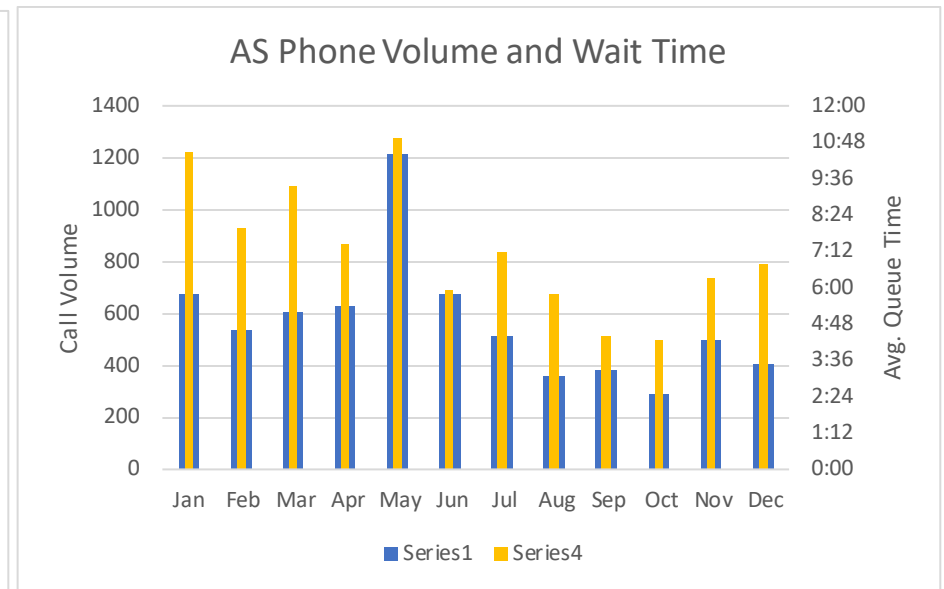


Figure 8 – AS Phone Volume and Avg. Queue Time

| x. 58731 | Jan | Feb | Mar | Apr | May | Jun | July | Aug | Sep | Oct | Nov | Dec | Total | Monthly Average |
|-------------------|-------|------|-------|------|-------|------|-------|------|-------|-------|------|------|-------|-----------------|
| Calls Presented | 675 | 540 | 607.5 | 630 | 1215 | 675 | 517.5 | 360 | 382.5 | 292.5 | 495 | 405 | 6795 | 566.3 |
| Calls Handled | 523 | 419 | 471 | 488 | 942 | 523 | 401 | 279 | 296 | 227 | 384 | 314 | 5266 | 439 |
| Calls Abandoned | 152 | 122 | 137 | 142 | 273 | 152 | 116 | 81 | 86 | 66 | 111 | 91 | 4740 | 127 |
| Abandonment Rate | | | | | | | | | | | | | | 22.5 (annual) |
| Avg. Queue Time | 10:27 | 8:00 | 9:22 | 7:25 | 10:55 | 5:54 | 7:12 | 5:46 | 4:24 | 4:16 | 6:21 | 6:47 | N/A | 7:14 |
| Average Talk Time | 2:49 | 2:56 | 2:50 | 2:44 | 1:55 | 2:38 | 2:45 | 3:18 | 2:18 | 3:52 | 3:23 | 2:48 | N/A | 2:51 |

Table 11 - AS Phone Data

As can be seen in the data:

- Quite interestingly, phone volume for the AS main line does not correlate with email volume to near the same extent we saw for ES. While email volume is consistently high for AS from January-June, phone volume only really peaks in May, with all other months being relatively near the monthly average.
- Queue times were significantly higher than for the AS line than any other student-facing line.
- Queue times were higher than average for the first 6 months of the year (even though call volume only peaked for month of May), indicating that email volume was likely having an impact on the AS front-line's capacity to service phones.

Phone Outside Open Hours

- As seen in Figure 9, a significant portion (39%) of all attempted calls come in between 8:30 a.m. and 1:00 p.m., while attempted calls outside regular business hours amount to only 8%.

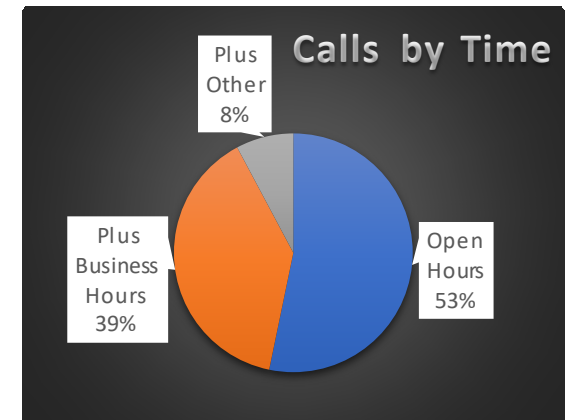


Figure 9 - AS Calls by Time

Staff Distribution

- The data in this section is limited to those services identified by the AS team as ideal for AS-Linc integration: phone service for the AS main line and email management for the admissio@uoguelph.ca, find.yourself@uoguelph.ca, and internat@uoguelph.ca accounts.
- The AS front-line staff member typically splits their day between email and phone (0.5 FTE on each).
- However, AS phone volume currently requires additional staff on a regular basis (up to 2 additional staff), despite average call times and overall annual volume being fairly consistent with ES phone load.
- The 0.5 FTE provided by the AS front-line staff member on email is augmented by approx. 10 hours/week of work from work-study students. (0.5 → 0.8 FTE)
- The weighting of 0.15 FTE placed on internat@uoguelph.ca email is derived from: a) relative volume compared to admissio@uoguelph.ca email (1:4.6) and b) guidance from internat@uoguelph.ca staff supervisor re. relative time spent on the account.

Traditional

| Task | Load (FTE) |
|---------------------|------------|
| AS Phone | 0.5 |
| Admissio email | 0.8 |
| Find.yourself email | 0.05 |
| Internat email | 0.15 |
| Total | 1.5 |

Table 12 - AS Staffing Needs

Workload

- Similar to the preceding *Staff Distribution* section, the data in this section is limited to those services identified by the AS team as ideal for AS:Linc integration.

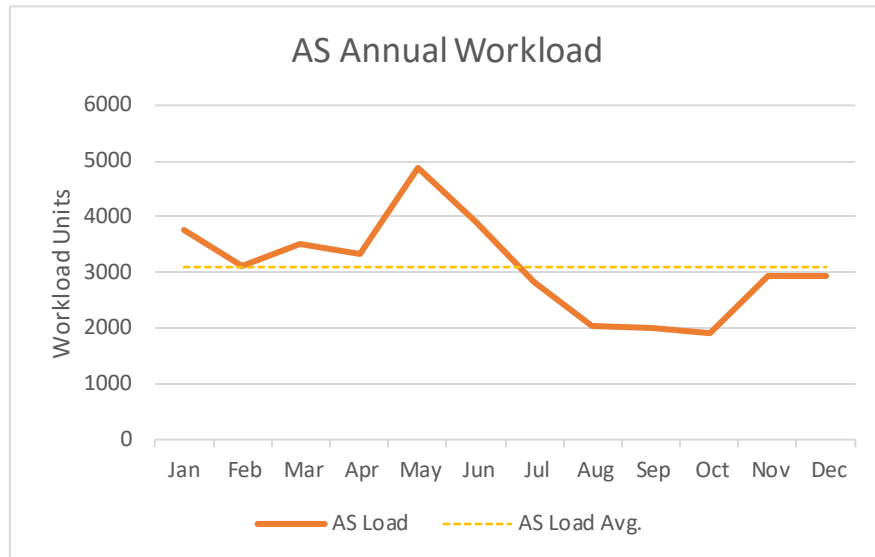


Figure 10 - AS Annual Workload

| | Jan | Feb | Mar | Apr | May | Jun | July | Aug | Sep | Oct | Nov | Dec | Total | Mon Avg |
|--------------|-------|-------|-------|-------|-------|-------|------|------|------|------|------|------|-------|---------|
| Workload | 3770 | 3126 | 3514 | 3317 | 4878 | 3899 | 2827 | 2034 | 1994 | 1910 | 2935 | 2948 | 37152 | 3096 |
| % of Average | 121.8 | 101.0 | 113.5 | 107.1 | 157.6 | 125.9 | 91.3 | 65.7 | 64.4 | 61.7 | 94.8 | 95.2 | N/A | N/A |

Table 13 - AS Annual Workload

As can be seen in the chart and data above:

- May is in a class of its own, being significantly more busy than any other months, due to a combination of high email volume and May being the lone month with significantly higher than average phone volume (almost double that of the next closest month).

- Without the workload spike created by the phone load in May, workload fluctuation largely mirrors email load, with workload being relatively high for the first half of the calendar year, dipping from July through October, and rising again for November and December.
- Each AS front-line FTE produces just over 2000 workload units/month (avg. approx. 3.1k wu/month/1.5 FTE).
- Workload over the course of the year is slightly more consistent for AS than ES.
 - The 4 busiest months for ES front-line accounted for 46% of total work done during the year, while the 4 busiest months (January, March, May, and June) for AS account for only 43%.

Analysis

- The annual workload distribution for AS front-line services (highest from January-June) presents an awesome opportunity to realize staffing efficiency was integrating these services with into the one-stop. The AS high-period matches with (relatively) low periods for ES and SFS, when the front-line staff for those units likely have some additional capacity. A staffing efficiency of up to 1.0 FTE can likely be found here.
- While service quality is significantly better than at one-stops at some comparator institutions, opportunities to improve service for students exist. Specifically,
 - On phones:
 - avg. queue time for the AS main line is significantly higher than for the ES and SFS units (7:14, vs. 3:07 (ES) and 2:07 (SFS)), likely contributing to a higher than desired abandonment rate (approx. 22.5%).
 - On email:
 - ART is generally quite strong for the admissio@uoguelph.ca account. However, that average is buoyed by very strong times during the off-peak season, with ART consistently rising (up to an average of more than a week) at the tail end of peak season (January-July).
 - There is room for improvement in ART for the applicant@uoguelph.ca (avg. 3.4, peaks at 6), internat@uoguelph.ca, and intapps@uoguelph.ca emails (avg. 4.3 and peaks at 7.5 business days).
- Difficulty keeping ARTs and phone queue times low is likely a product of a few factors, including:
 - Only having 1 dedicated front-line staff member available to manage the admissio@uoguelph.ca email and main AS phone line.
 - Prolonged periods of busyness that don't allow for "catch-up times," that results in snowballing ARTs.
 - Not having staff members whose sole (or at least primary) focus is managing front-line email accounts (as noted above, internat@uoguelph.ca and intapps@uoguelph.ca accounts are managed by numerous IR&A staff who have a variety of competing responsibilities.
- Similar to ES front-line service, opportunity exists to miss far fewer phone calls by extending phone service to match business hours (39% of calls come in between 8:30 a.m. and 1:00 p.m.).
 - Hypothesis: the percentage of people calling the AS main line during the morning is higher than those calling the ES line at the same time (39% of all daily calls, vs. 27%) because those calling the AS main line are more likely external to the university and thus less likely to be repeat callers/be aware of reduced phone availability on campus during the pandemic.

Student Financial Services

Scope

Similar to ES, responsibility for Student Financial Service (SFS) front-line staff can be loosely grouped into three categories: email management; phone support, and processing (e.g. attending to queues within OSAP system).

- Email Management
 - Three SFS email accounts are currently advertised to students:
 - accquest@uoguelph.ca, for account-related questions;
 - finaid@uoguelph.ca, for questions related to OSAP and other government aid; and
 - awards@uoguelph.ca, for questions related to scholarships, bursaries and awards.
 - Currently only the finaid@uoguelph.ca account is supported by front-line staff. However, front-line staff do field account- and award-related questions from phone and in-person customers thus making the integration of these accounts into The Linc worth consideration.
 - Service data for the accquest@uoguelph.ca and awards@uoguelph.ca email accounts is included in this report (where available).
- Phone Service
 - SFS has one advertised phone number (x.58715), managed by the front-line staff. Detailed service data is captured for this line.
- Processing
 - While significant processing activities happen as a result of front-line staff managing the finaid@uoguelph.ca email, those activities are captured in the time spent on email.
 - A significant source of staffing time not captured by email management is work within the OSAP system (and other out-of-province equivalents), reviewing and acting on actions taken by students (managing the queues). Data on the number of these processing actions is not readily available and thus there isn't a *Processing* data section below. However, estimates of staff time spent working on processing are available and will be used in the *Workload* section.
- Staffing
 - Consistent with the ES and AS front-lines, periods of peak service load necessitate a) significant support from back-office SFS staff (e.g. almost all OSAP queue processing shifting to back-office, back-office staff helping handle phone service, etc.) and b) staff working over-time.
 - However, as the majority of staff report taking their overtime as lieu (no net staffing impact) and because back-office support for the front-lines tends to occur for relatively small windows of time, there is limited impact on annual average staffing levels (measured in FTEs).
 - Work from "back-office" SFS staff on services included in this review but not currently residing at the front lines (e.g. managing accquest@uoguelph.ca email) will be included.

Email

- Data related to SFS email load and quality are available below.

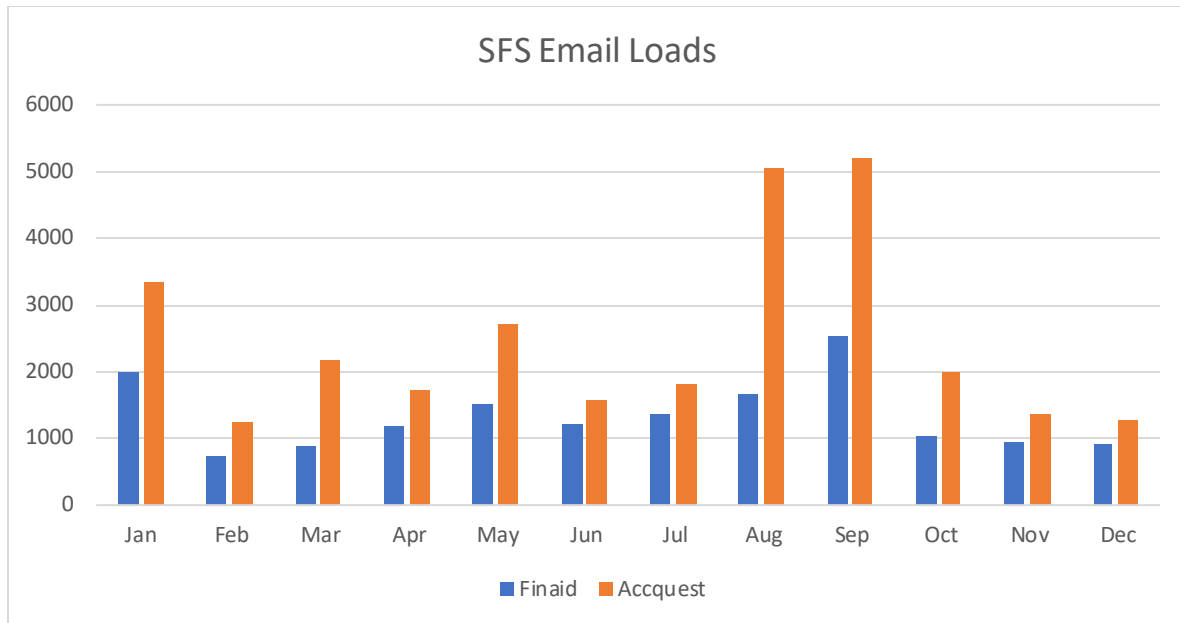


Figure 11 – Finaid and Accquest Email Loads

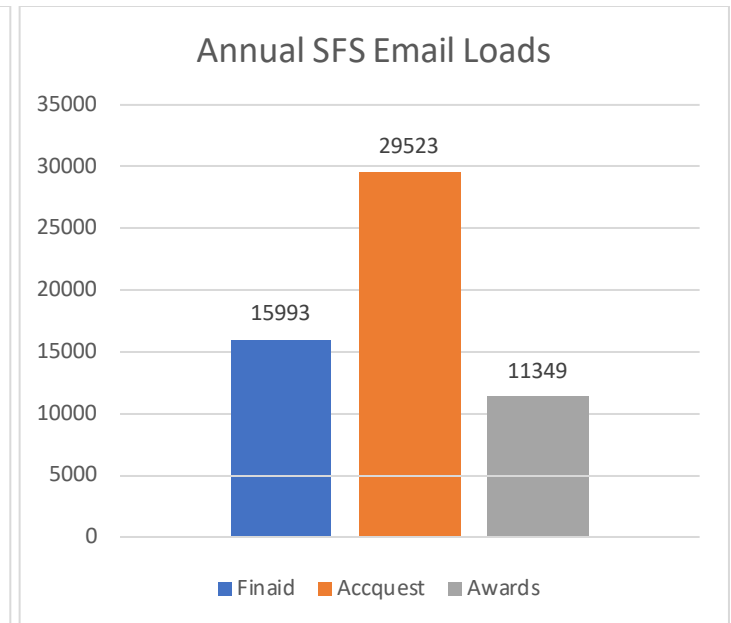


Figure 12 – SFS Annual Email Loads

| Account | Jan | Feb | Mar | Apr | May | Jun | July | Aug | Sep | Oct | Nov | Dec | Total | Monthly Average |
|----------|------|------|--------|------|------|------|------|------|------|------|------|------|--------|-----------------|
| finaid | 1983 | 738 | 897.00 | 1187 | 1506 | 1207 | 1374 | 1672 | 2528 | 1048 | 951 | 902 | 15993 | 1332.8 |
| ART | 1.1 | 0.9 | 0.5 | 0.5 | 0.6 | 1.0 | 0.7 | 1.0 | 1.4 | 0.5 | 0.6 | 0.6 | N/A | 0.77 |
| accquest | 3352 | 1237 | 2162 | 1730 | 2717 | 1587 | 1807 | 5055 | 5208 | 2004 | 1381 | 1283 | 29523 | 2460.3 |
| ART | 0.7 | 0.6 | 0.8 | 0.7 | 0.9 | 0.6 | 0.5 | 0.7 | 0.7 | 0.5 | 0.6 | 0.58 | N/A | 0.66 |
| awards* | | | | | | | | | | | | | 11349* | 945.8 |

*only total annual sent email load available for awards account.

Table 14 - SFS Email Data

As you can see in the charts and data:

- Email volume for the accquest@uoguelph.ca account is slightly greater than that for finaid@uoguelph.ca and awards@uoguelph.ca combined.
- As expected, load reflects the academic calendar, being heaviest for January, May, August and September.
- The magnitude of the accquest@uoguelph.ca load and the size of the spikes in January, August and September illustrates why the required staffing accompaniment jumps from approx. 1.0 FTE to 3.0 FTE at peak periods (will be detailed in *Staffing Distribution* section).
- The ART for the finaid@uoguelph.ca and accquest@uoguelph.ca accounts is outstanding, being about 1.5 business days quicker than ART for our next best major email account (es@uoguelph.ca, avg. 2.3 business days)
- You don't see awards@uoguelph.ca included in Figure 11 as only the annual load is currently available.

Phone

- Data related to the SFS main phone number (x58715) is available below.

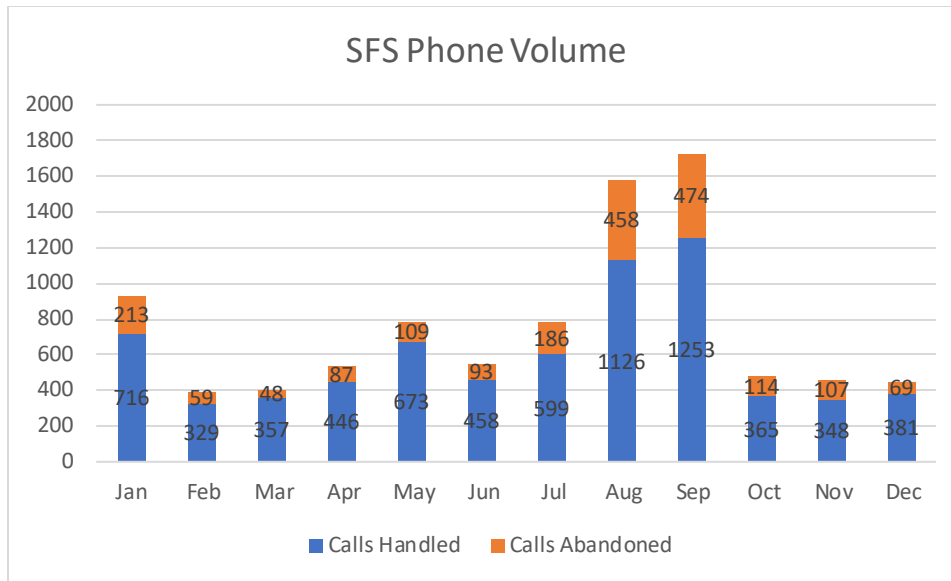


Figure 13 – SFS Phone Volume

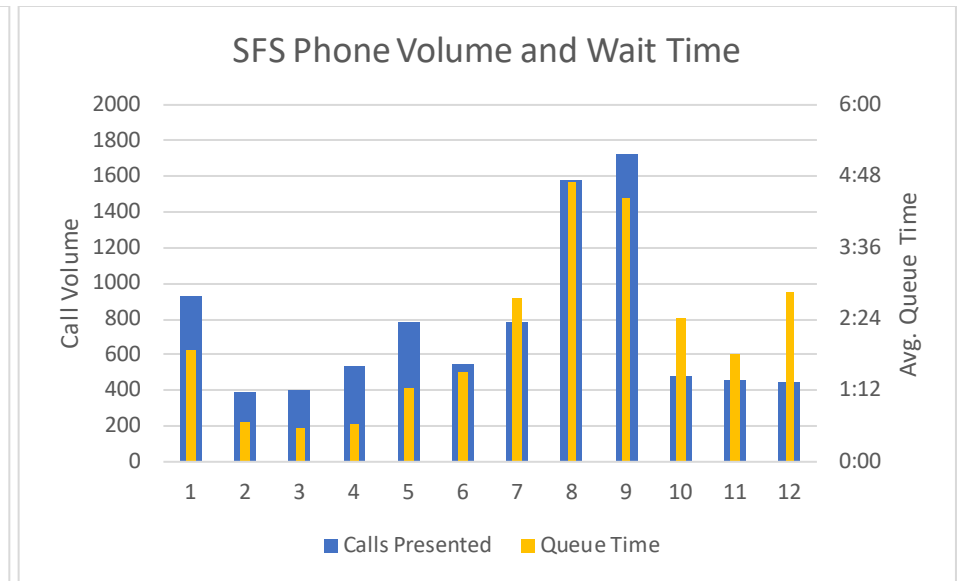


Figure 14 – SFS Phone Volume and Avg. Queue Time

| x. 58731 | Jan | Feb | Mar | Apr | May | Jun | July | Aug | Sep | Oct | Nov | Dec | Total | (Monthly) Average |
|-------------------|------|------|------|------|------|------|------|------|------|------|------|------|-------|-------------------|
| Calls Presented | 929 | 388 | 405 | 533 | 782 | 551 | 785 | 1584 | 1727 | 479 | 455 | 450 | 9068 | 755.7 |
| Calls Handled | 716 | 329 | 357 | 446 | 673 | 458 | 599 | 1126 | 1253 | 365 | 348 | 381 | 7051 | 587.6 |
| Calls Abandoned | 213 | 59 | 48 | 87 | 109 | 93 | 186 | 458 | 474 | 114 | 107 | 69 | 2017 | 168.1 |
| Abandonment Rate | 29.7 | 17.9 | 13.4 | 19.5 | 16.2 | 20.3 | 31.1 | 40.7 | 37.8 | 31.2 | 30.7 | 18.1 | N/A | 25.6 |
| Avg. Queue Time | 1:52 | 0:41 | 0:34 | 0:39 | 1:15 | 1:31 | 2:45 | 4:43 | 4:27 | 2:26 | 1:49 | 2:51 | N/A | 2:07 |
| Average Talk Time | 3:43 | 3:36 | 3:14 | 3:15 | 3:53 | 4:30 | 5:04 | 4:04 | 4:03 | 4:39 | 4:26 | 4:11 | N/A | 4:03 |

Table 15 – SFS Phone Data

As can be seen in the data above:

- August and September have by far the highest call volume, followed by January, then May and July, which both come in just above average.
- Abandonment rate and queue time generally correlate with call volume. However, there is a fairly consistent bump in both metrics over the second half of 2021, relative to the volume:rate and volume:queue time relationships depicted over the first 6 months of the year.
- Interesting, abandonment rate is considerably higher for x58731 (25.6%) than for the ES main line (x.58721) (13.2%), despite the avg. queue time for the SFS extension actually being about a minute less than for the ES main line.
- The average call is 33% longer than the average ES (3:02) and AS (2:51) call, not accounting for follow-up work.

Staffing Distribution

- The data in this section is limited to those services receiving consideration for integration: phone service, processing work, and email management for the finaid@uoguelph.ca and accquest@uoguelph.ca accounts.

- The SFS front-line staffing contingent was 3.0 FTE through 2021.
- Owing to capacity for back-office staff to support processing when needed, how SFS front-line staff allot their time is dependent on time of year/email and phone volume.
 - As can be seen in Table 16, during peak periods, staff generally only spend about 10% of their time on processing work (back office takes over), splitting the other 90% between phones and email.
 - During off-peak periods, this breakdown shifts to staff being scheduled evenly for phones, email, and processing. However, staff are able to engage in significantly more email and processing as the staff member on phones can contribute in those areas thanks to decreased phone volume.
- The amount of time the unit spends in “peak periods” vs. “off-peak periods” was incorporated into the weighted average FTE assigned to each responsibility area, used to help calculate workload factors.
- Table 16 also captures the back-office staffing dedicated to the accquest@uoguelph.ca email.

Staffing Load (FTE)

| Responsibility | <i>Peak Periods</i> | <i>Off-Peak Periods</i> | <i>Weighted Avg.</i> |
|-------------------------|---------------------|-------------------------|----------------------|
| Email (finaid) | 1.35 | 1.25 | 1.28 |
| Phone | 1.35 | 0.5 | 0.78 |
| Processing | 0.3 | 1.25 | 0.93 |
| <i>Front-Line Total</i> | 3.0 | 3.0 | 3.00 |
| Email (accquest) | 3.0 | 1 | 1.5 |
| Total | 6 | 4 | 4.5 |

Table 16 – SFS Staffing Levels

Workload

- Similar to the *Staffing Distribution* section above, the data in this section is limited to those services being considered for SFS:Linc integration.
 - The awards@uoguelph.ca account is not included in the workload data below as consultation with SFS staff has indicated that integration for this account is not likely feasible for the initial Linc goal state, as even within SFS, front-line staff are not currently as equipped with awards-related knowledge as they are with knowledge related to financial aid and student accounts.

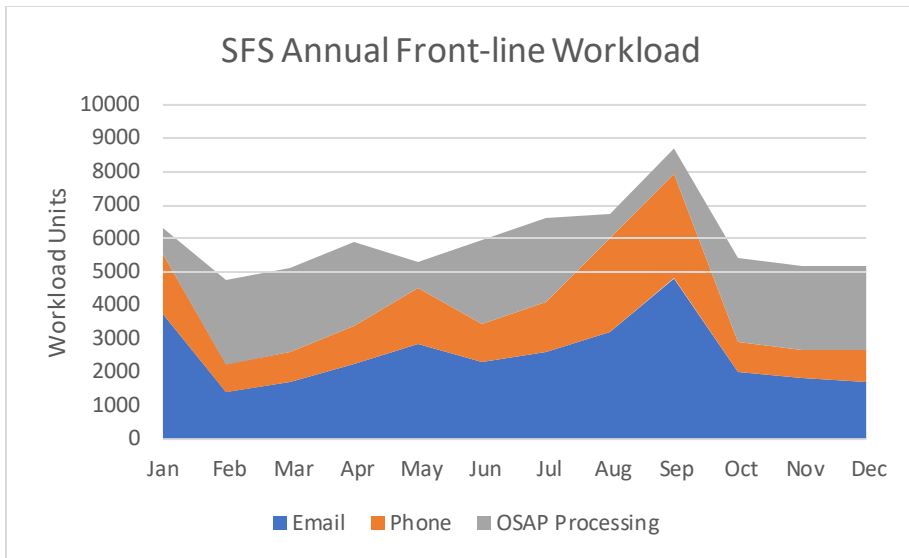


Figure 15 – SFS Annual Workload

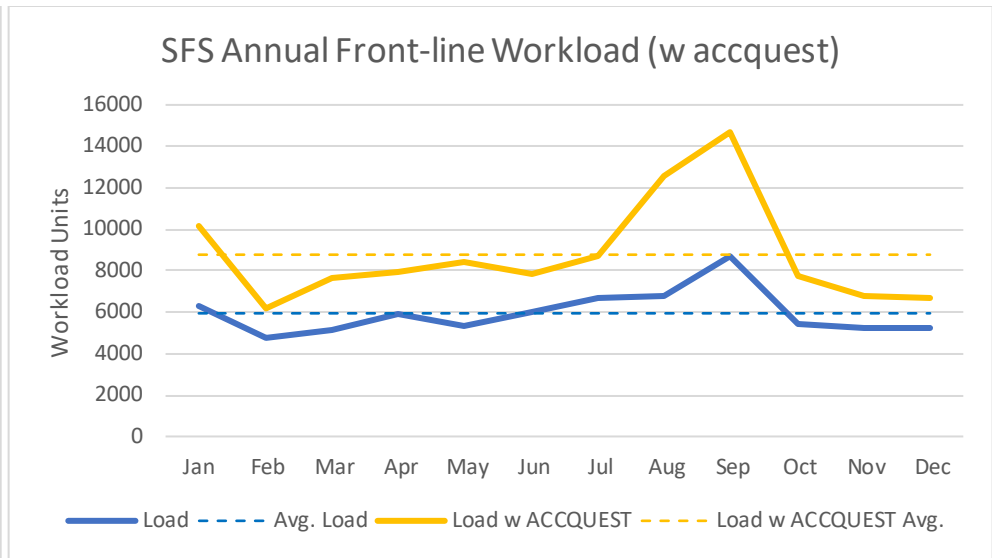


Figure 16 – SFS Annual Workload Incl. Accquest Account

| | Jan | Feb | Mar | Apr | May | Jun | July | Aug | Sep | Oct | Nov | Dec | Total | Mon Avg |
|-----------------|-------|------|------|------|------|------|------|-------|-------|------|------|------|--------|---------|
| Workload | 6317 | 4757 | 5129 | 5903 | 5304 | 5971 | 6640 | 6751 | 8695 | 5436 | 5209 | 5199 | 71311 | 5943 |
| % of Average | 106 | 80 | 86 | 99 | 89 | 100 | 112 | 114 | 146 | 91 | 88 | 87 | N/A | N/A |
| Workload (ACCQ) | 10172 | 6179 | 7615 | 7892 | 8428 | 7796 | 8718 | 12565 | 14685 | 7741 | 6797 | 6674 | 105262 | 8772 |
| % of Average | 116 | 70 | 87 | 90 | 96 | 89 | 99 | 143 | 167 | 88 | 77 | 76 | N/A | N/A |

Table 17 – SFS Workload Data

As you can see in the charts and data:

- As expected, without taking into account processing work (just up to orange area in Fig. 15), January, May, August, and September are the busiest months.
- When processing work is added in, the formula used to do so results in May falling below April, June, and July, but that is an error due to the method created to distribute OSAP work. While load for May is likely higher than for April and June, the load isn't missing, but just inaccurately assigned elsewhere.
- There is less fluctuation in SFS front-line work-load than there is in the loads for ES and AS, as a result of the flexibility to shift processing work back and forth between the front and back. This flexibility largely mutes the ebbs and flows for the SFS front-line, resulting in only 40% of total annual workload occurring in the busiest 4 months (vs. 46% for ES and 43% for AS).
- Similar to ES and AS front-line staff, each SFS FTE produces just under 2000 workload units/month (avg. 5.94k wu/month/3.0FTE or 8.77K wu/month/4.5 FTE).

Analysis

- Overall, service quality for SFS front-line services is outstanding.

- With respect to email, the ARTs for the finaid@uoguelph.ca and accquest@uoguelph.ca accounts are by far our lowest for any front-line email, despite their tremendous combined volume (over 45k sent emails annually).
- With respect to phones, average queue time for the SFS main line is also the lowest across all main phone lines, many months being mere seconds longer than it takes customers to navigate the queue (queue navigation is included in time).
- In seeming contrast to this data, abandonment rate for the SFS main line is exceptionally high, averaging over 25% for the year and peaking near 40% for the months of August and September. While this abandonment rate is difficult to understand (and should be investigated to help better our understanding), it still presents a significantly opportunity to better serve many customers.
- The (relative) workload consistency (compared to the ES and AS front-lines) means that there is less opportunity to find staffing efficiencies on the SFS-front. Because of the flexibility of processing work, there are few times when workload decreases to a point where SFS front-line staff have additional capacity.

ORS Totals

- This section of the report will compile ES, AS, and SFS data for easier viewing and comparison.

Email

- Data comparing email load and service quality for each department is included below.

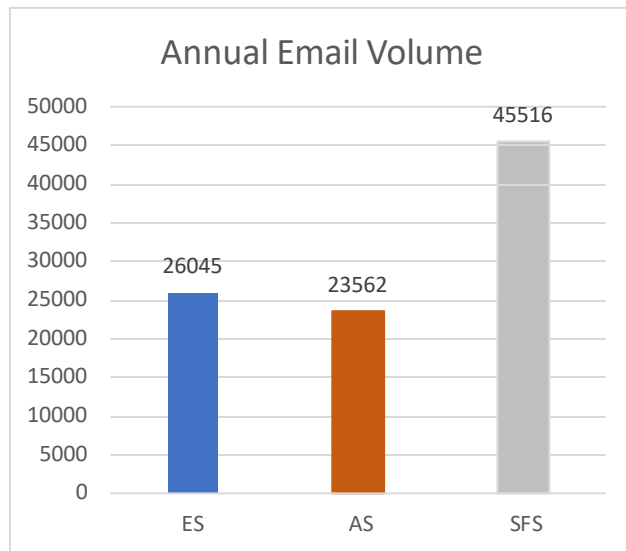


Figure 17 - ORS Annual Front-line Email Volume

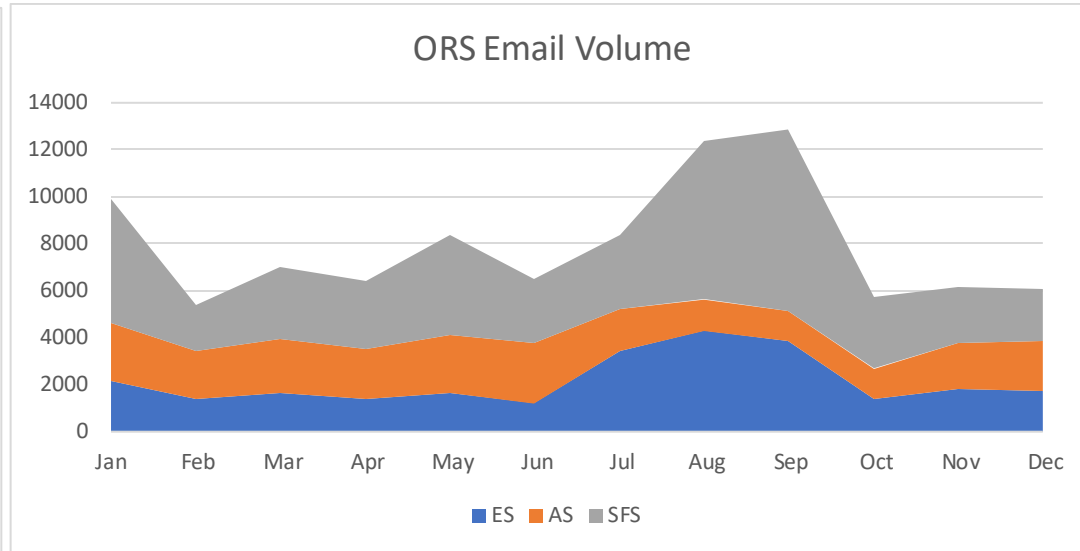


Figure 18 – ORS Email Volume By Month

- Important to note re. Figures 17/18:
 - Accquest@uoguelph.ca load is included in the SFS data.
 - The above charts are depicting email volume (# of emails) vs. email load (email volume x load factor). Given that the finaid@uoguelph.ca has the highest load factor (1.9, vs. 1.15 for accquest@uoguelph.ca, 1.3 for es@uoguelph.ca, and 1.0 for AS emails), SFS email accounts for an even greater percentage of total email load than depicted.

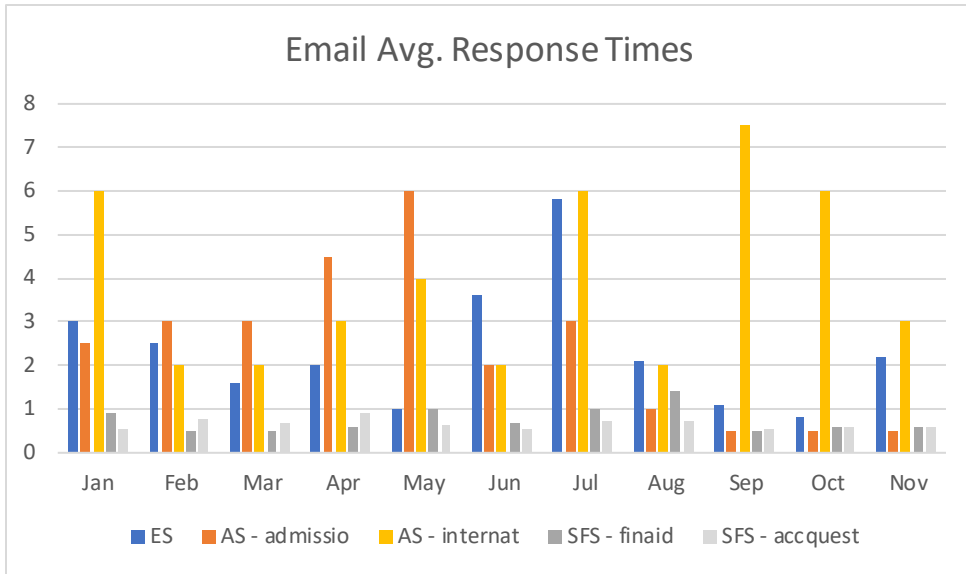


Figure 19 – ORS Front-line Email ARTs

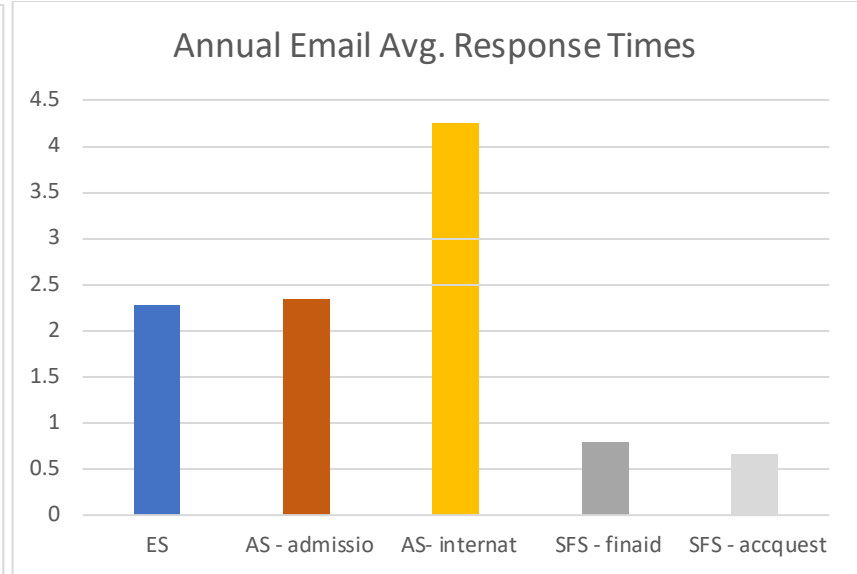


Figure 20 – ORS Front-line Email Annual ARTs

Phone

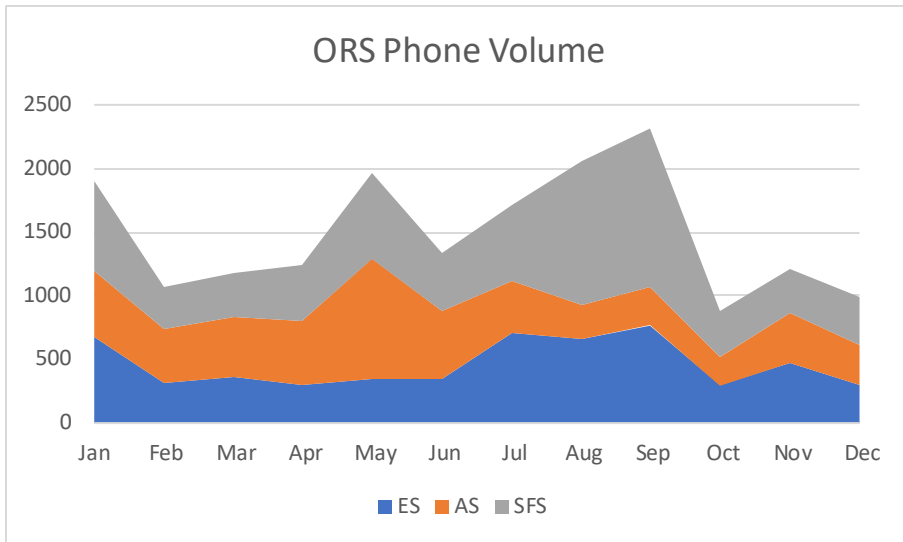


Figure 21 - ORS Total Front-line Phone Volume by Month

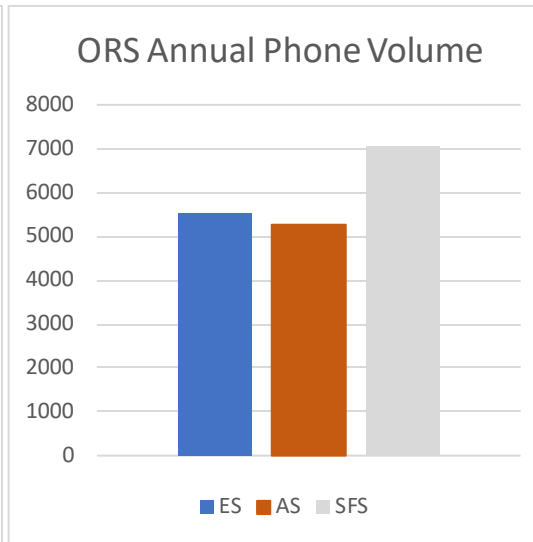


Figure 22 – ORS Total Front-line Annual Phone Volume

- Similar to email data, the above charts depict phone volume (# of emails) vs. phone service load (phone volume x load factor).
- Overall SFS call volume is about 20% higher than that for ES and AS and, when combined with slightly longer calls (avg. 4:03 vs. 2:51 (AS) and 3:02 (ES)), results in SFS staff needing to spend approx. 75% more time on phones than other units, not accounting for follow-up associated with each call.

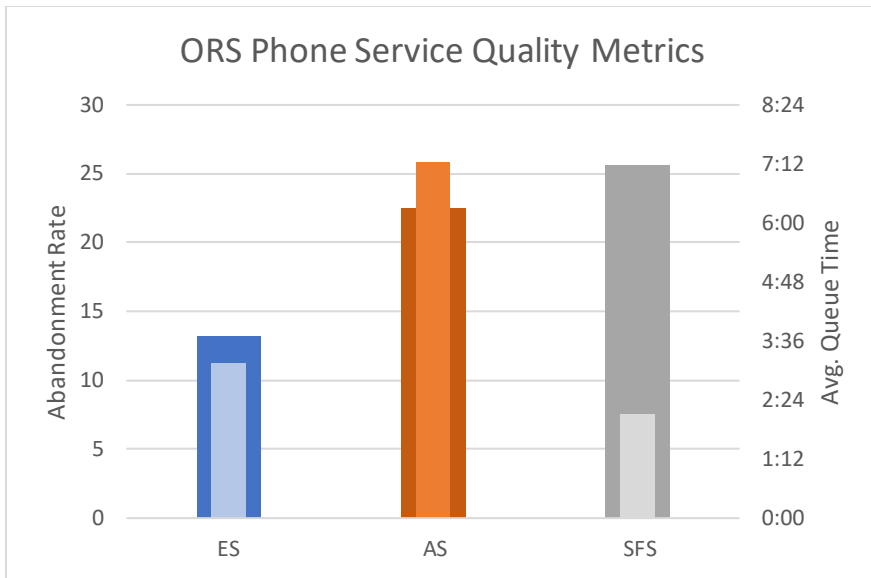


Figure 23 – ORS Front-line Phone Service Quality

- As noted in the SFS Data section, SFS has the highest abandonment rate (thick line) and lowest avg. queue time (thin line). Explaining this phenomenon would require further investigation.

Processing

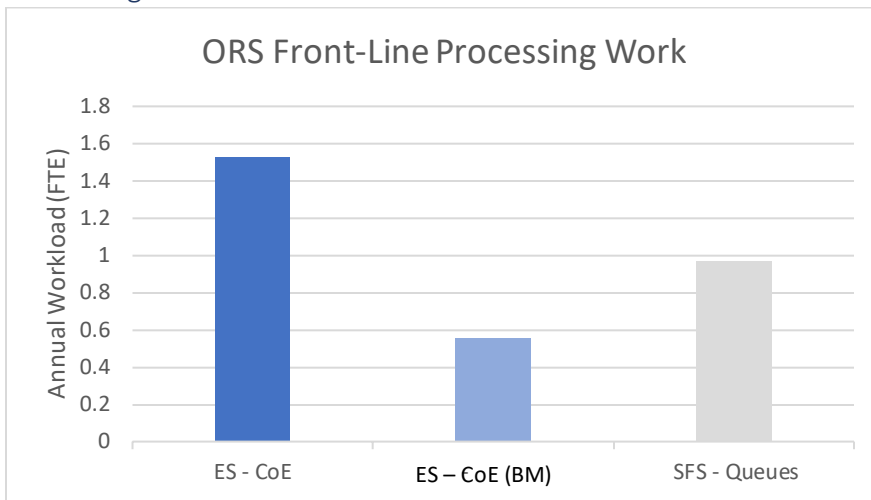


Figure 24 – ORS Front-line Processing Work (FTE)

Staffing and Workload

- Table 18 combines the staffing level data introduced in each *Staffing Distribution* section of this report, adjusted for months when additional staff supported front-line service activities:

| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|----------------------------------|-----|-----|-----|-----|------|-----|-----|------|-------|-----|-----|-----|
| ES | 3.5 | 3.5 | 3.5 | 3.5 | 3.5 | 3.5 | 3.5 | 3.75 | 3.75 | 3.5 | 3.5 | 3.5 |
| AS | 1.5 | 1.5 | 1.5 | 1.5 | 2 | 1.5 | 1.5 | 1.5 | 1.5 | 1.5 | 1.5 | 1.5 |
| SFS (current front-lines) | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 4 | 4 | 3 | 3 | 3 |
| SFS – accquest | 2 | 1 | 1 | 1 | 2 | 1 | 1 | 1.25 | 2 | 1 | 1 | 1 |
| Total | 10 | 9 | 9 | 9 | 10.5 | 9 | 9 | 10.5 | 11.25 | 9 | 9 | 9 |

Table 18 – ORS Front-line Staffing Level, 2021

- As can be seen above:
 - 9.0 FTE staff members is the base monthly staffing level for the services being considered for Linc integration.
 - For the months of January, May, August, and September, 2021, additional staff were engaged to help support front-line activities. Explanation for each month is as follows:
 - January
 - Staff supporting accquest@uoguelph.ca increased to an average of 2.0 FTE for the month, owing to support from the Student Accounts Clerk (typically moves to full-time), Student Office Assistant, Bonnie, and Brenda equating to a load of approx. 3.0 FTE for half the month. (SFS – accquest: 1.0 → 2.0)
 - May
 - May presents the greatest total workload for the AS front-lines and up to 2 members of the AS team support front-lines with phones as needed throughout. (AS: 1.5 → 2.0)
 - Similar to January, staff supporting accquest@uoguelph.ca increased to an average of 2.0 FTE for the month (SFS – accquest: 1.0 → 2.0).
 - August
 - The ES front-line staff Manager dedicated an estimated ¼ of their time to actively providing front-line service during August and September. (ES: 3.5 → 3.75)
 - OSAP and other financial aid processing work was largely completed by back-office staff (SFS: 3.0 → 4.0)
 - Additional support on the accquest@uoguelph.ca account for a week surrounding the registration deposit deadline (1.0 → 1.25)
 - September
 - Similar to January and May, staff supporting accquest@uoguelph.ca increased to an average of 2.0 FTE for the month (SFS – accquest: 1.0 → 2.0).
 - Similar to August, the ES front-line staff Manager dedicated an estimated ¼ of their time to actively providing front-line service during August and September. (ES: 3.5 → 3.75) and OSAP and other financial aid processing work was largely completed by back-office staff (SFS: 3.0 → 4.0)

- Knowing the level of staff dedicated to these activities over the previous calendar year, will allow us to compare staffing to staffing levels needed to handle each of the workload scenarios identified below, to confirm whether staffing efficiencies are indeed possible.

With accquest@uoguelph.ca included:

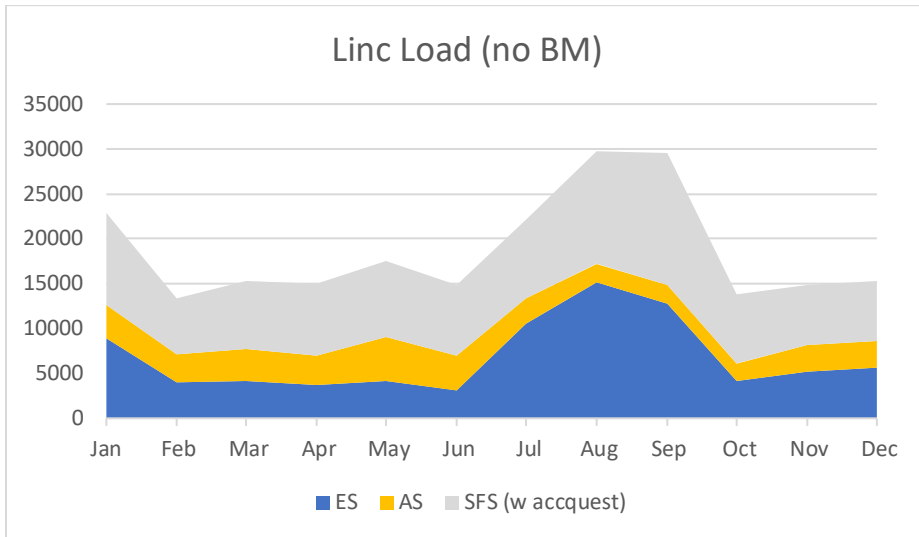


Figure 25 – Projected Linc Load (Acc in, no BM)

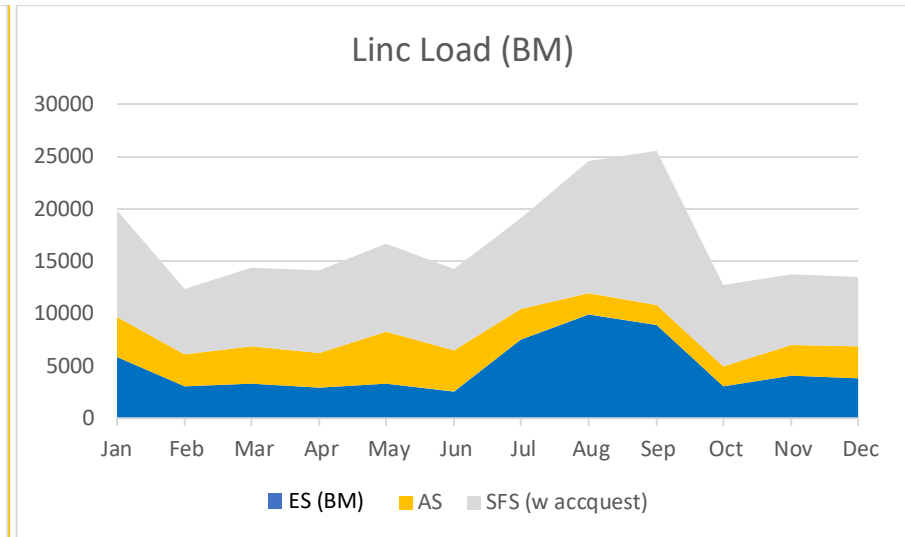


Figure 26 – Projected Linc Load (Acc in, BM)

Without accquest@uoguelph.ca included:

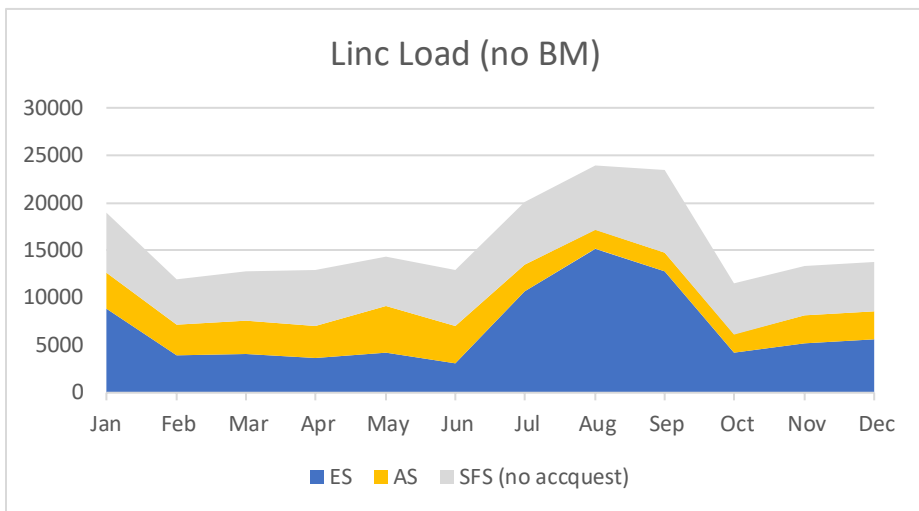


Figure 27 – Projected Linc Load (Acc out, no BM)

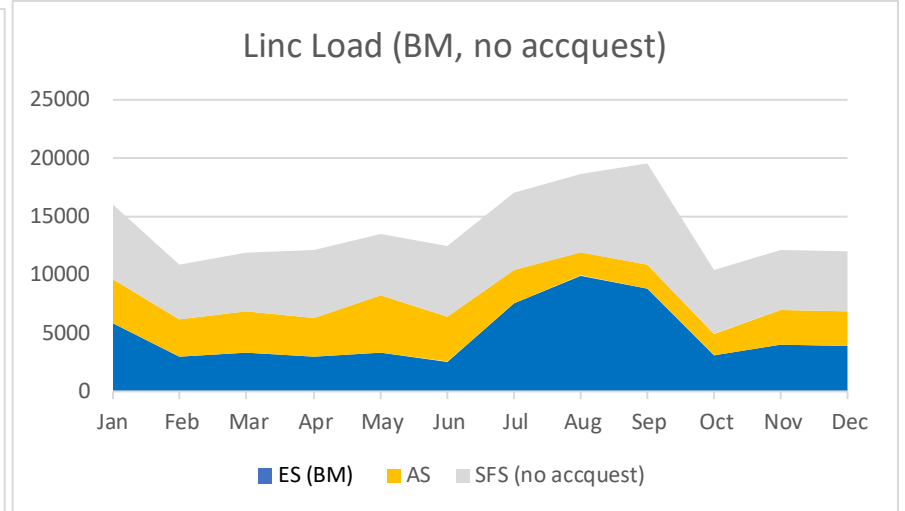


Figure 28 – Projected Linc Load (Acc out, BM)

- Using average staff output of approx. 2000 work units/month, the following staffing loads would be required to support each model:

With accquest@uoguelph.ca included:

| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Avg. NP Months |
|----------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|----------------|
| Work Load (no BM) | 22802 | 13301 | 15263 | 14934 | 17498 | 14790 | 22153 | 29743 | 29490 | 13858 | 14889 | 15268 | N/A |
| Staffing Load (FTE) | 11.4 | 6.7 | 7.6 | 7.5 | 8.7 | 7.4 | 11.1 | 14.9 | 14.7 | 6.9 | 7.4 | 7.6 | 7.3 |
| Work Load (BM) | 19816 | 12310 | 14437 | 14133 | 16649 | 14260 | 19113 | 24502 | 25536 | 12691 | 13748 | 13495 | N/A |
| Staffing Load (FTE) | 9.9 | 6.2 | 7.2 | 7.1 | 8.3 | 7.1 | 9.6 | 12.3 | 12.8 | 6.3 | 6.9 | 6.7 | 6.8 |

Table 19 – Projected Linc Staffing Data, with ACC

- Not employing the “Batch Method” technique to reduce CoE production time, a core compliment of 7.5 FTE front-line staff (plus management) would be needed to provide the identified services.
- Employing the “Batch Method” to reduce CoE load contribution, a compliment of only 7.0 FTE front-line staff (plus management) would be needed for non-peak months.

Without accquest@uoguelph.ca included:

| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Avg. NP Months |
|----------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|----------------|
| Work Load (no BM) | 18947 | 11878 | 12777 | 12945 | 14373 | 12965 | 20075 | 23930 | 23500 | 11554 | 13301 | 13792 | N/A |
| Staffing Load (FTE) | 9.5 | 5.9 | 6.4 | 6.5 | 7.2 | 6.5 | 10.0 | 12.0 | 11.8 | 5.8 | 6.7 | 6.9 | 6.4 |
| Work Load (BM) | 15961 | 10888 | 11951 | 12143 | 13525 | 12435 | 17035 | 18688 | 19547 | 10386 | 12160 | 12020 | N/A |
| Staffing Load (FTE) | 8.0 | 5.4 | 6.0 | 6.1 | 6.8 | 6.2 | 8.5 | 9.3 | 9.8 | 5.2 | 6.1 | 6.0 | 5.9 |

Table 20 – Projected Linc Staffing Data, no ACC

- In the no-BM, no accquest-scenario, only 6.5 FTE front-line staff (plus management) would be needed to provide the identified services, in non-peak months.
- Employing the “Batch Method” and not including the accquest@uoguelph.ca account, a compliment of only 6.0 FTE front-line staff (plus management) would be needed for non-peak months.

- Knowing the combined workload (FTE) for each of the scenarios above, we can compare each scenario to 2021 staffing levels:

Core Staffing

| Scenario | Staffing Level Required (FTE) |
|---------------------------|-------------------------------|
| 2021 | 9.0 |
| Accquest in, no BM | 8.0* |
| Accquest in, BM employed | 7.5* |
| Accquest out, no BM | 7.0* |
| Accquest out, BM employed | 6.5* |

*0.5 FTE added to account for an entry-level manager-style position that only spends ½ their time on the front-line.

Table 21 – Linc Staffing Scenarios

Analysis

- Combining front-line services for ES, AS, and SFS results in the concentration of considerable service volume. Combining all the services currently being considered for The Linc would result in annuals loads of approx. 84,000 emails and approx. 18,000 phone calls.
- Luckily, we are starting from a place of existing service quality.
 - Front-line email ART is fairly strong across the integrating departments, with AS being the only area where there is considerable opportunity for improvement.
 - Queue times are also generally quite strong, with all departments coming in with average values that are less than some of comparator schools. That said, opportunity does exist to improve customers experiences on the phone services front, through:
 - improving the AS main line average queue time;
 - Improving AS and SFS abandonment rates; and
 - Expanding service hours to better reflect calling patterns.
- Adding together the staffing levels for all the services being considered for Linc integration, we find that we have a core team of 9.0 FTE staff. This team is sufficient for off-peak times, but is supplemented in a variety of ways at peak periods, including:
 - hiring PT staff that can be flexed to FT for limited periods of time;
 - relying on “tier-2” (back-office) support; and
 - utilizing flexible student staff.
- Staffing efficiency is possible through consolidating the identified services in The Linc! Owing to off-set ebbs and flows (AS being on a different schedule than ES and SFS), the staffing needed to support the full complement of services identified for potential inclusion can be reduced to 8.0 FTE (7.5 FTE to handle front-line load and an extra 0.5 FTE for the staff member that is splitting their time between the front-lines and entry-level management).
 - Employing the Batch Method for CoE production further decreases the number of staff needed to 7.5.

Other

- In addition to seeking support through emailing or calling front-line staff, students also access the Office of Registrarial Services website, (<https://www.uoguelph.ca/registrar/>), the AskGryph tool, and the Undergraduate Academic Information Centre (UAIC) to help them find answers to their questions. Data related to each of these services is included below.

AskGryph – Questions Asked

| Jan | Feb | Mar | Apr | May | Jun | July | Aug | Sep | Oct | Nov | Dec | Average | Total |
|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|----------|--------|
| 26694 | 16796 | 17388 | 16943 | 19634 | 14761 | 22731 | 30040 | 25374 | 16066 | 20564 | 22479 | 20789.17 | 249470 |

Table 22 – AskGryph Annual Question Load

Undergraduate Academic Information Centre – Student Interactions

| | Winter 2021 | Summer 2021 | Fall 2021 | Total 2021 |
|----------------|-------------|-------------|-----------|------------|
| In-Person | 15 | 17 | 2626 | 2658 |
| Email | 805 | 1022 | 820 | 2647 |
| Estimated Chat | 2743 | 1334.2 | 2704.4 | 6781.6 |
| Total | 3563 | 2373.2 | 6150.4 | 12086.6 |

Table 23 – UAIC Annual Student Interactions

admission.uoguelph.ca Website Data

| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Total |
|-----------------|--------|--------|--------|-------|--------|-------|-------|-------|-------|--------|--------|--------|---------|
| Sessions | 165873 | 134437 | 114266 | 87722 | 113286 | 66258 | 63639 | 60386 | 88139 | 164028 | 162713 | 192208 | 1412955 |
| Unique Visitors | 9.5 | 5.9 | 6.4 | 6.5 | 7.2 | 6.5 | 10.0 | 12.0 | 11.8 | 5.8 | 6.7 | 6.9 | N/A |

Table 24 – Admission Website Data

- As can be seen in Tables 22-24:
 - The UAIC provided an estimated 12.1K service interactions in 2021, equating to 11.9% of the interactions facilitated by ORS front-line staff (102K emails and phone calls).
 - Students “Asked Gryph” approx. 249K questions, equating to 244% of all interactions with ORS front-line staff.
 - Users engaged in 1413K sessions (avg. duration of 2:34) on the admission.uoguelph.ca website (data for whole ORS website not available), equating to 1385% of their interactions with ORS front-line staff.

Analysis

- The magnitude of the website and AskGryph usage indicate that extent to which students are willing to engage self-service options as a first option. Because of the magnitude of students’ interactions with these tools, even small capacity and/or efficiency increases for either could result in significantly reduced front-line volume.