Planning and Redesign for the Campus Information and Visitors Center (CIVC)

A Case Study

► **Unit(s):**
UW-Madison Campus Information and Visitor Center (CIVC)

► **Customers of the Process and Their Needs:**
The entire staff (seven people) was included in the planning process. This included classified and academic staff as well as two student staff. The process, facilitated by an OQI consultant, occurred in three meetings (of 3-4 hours each) over approximately 4-5 weeks. The planning meetings were held at the Pyle Center.

► **Problem/Opportunity Statement:**
Visitor Services and Campus Information were merged in January 2002 to become one office: Campus Information and Visitor Center (CIVC), a program of the Chancellor’s office. The merging of the two offices, including the coming together of the two staff groups, presented an opportunity to think both realistically and strategically about the organization. More specifically, merging these two offices raised questions about the purpose and focus of the organization and the staff’s understanding of their roles and responsibilities.

► **Changes Made:**
Through this process CIVC developed ground rules, mission and vision statements, core functions, roles and responsibilities, work teams, and a framework for goals/actions. In general, this process allowed CIVC to move toward streamlining the organization. It reinforced that CIVC would continue to serve all customers previously served and that the synergy of two formerly separate functions could now allow for the expansion of services. In sum, this process led to greater efficiency and expansion of services, improved communication, joint decision-making, and enhanced leadership.

► **Lessons Learned:**
First, it is important to consider the timing of the planning process, especially in relation to how well the staff knows one another and feels a sense of trust. In short, group dynamics matter – second, leadership matters. For example, the work teams idea that was envisioned in the planning process was eventually discarded under new leadership. This work structure did not work well primarily because of the size of the staff — essentially, everyone was on every team. According to Wren, it certainly was worth the time to go through this planning process. In particular, the roles and responsibilities exercise was helpful in clarifying issues and providing a framework for carrying out the mission.

► **Next Steps:**
CIVC will continue to develop short-term and long-term goals based on the original framework that evolved from the planning process. Shortly, they will be conducting a mini-strategic planning process to revisit and check on the accuracy and progress of the plan. Wren stated that she thought this check process would reap different and improved benefits.

► **Contacts:**
Wren Singer, Office of Vice Chancellor for Student Affairs
General Services, 124 Armory and Gymnasium
Phone: (608) 261-1444
E-mail: singer@redgym.wisc.edu
CIVC Strategic Planning: 2001-2002

**Ground Rules**

*What can facilitators do to make this a failure?*
Never stop talking
Take sides
Try to control content outcome
Forget post-its
Let someone dominate
Misreport findings or the process
Not challenge group when appropriate
Not encourage all to participate

*What can you do to make this fail?*
Not listen to each other
Be insufficiently serious
Not be respectful to one another
Not try to understand other points of view
Not let by-gones be by-gones
Don’t think big
Air feelings outside and not here
Either dominate or say nothing

**Mission Statement**

To provide information, referrals, off-campus housing listing service, tours, and assistance to make the university more welcoming and inclusive for UW-Madison students, prospective students, staff and faculty, alumni and visitors.

**Vision Elements**

To carry out its mission, the Campus Information and Visitor Center will become the “campus gateway” that aims to support and enhance the UW-Madison mission statement and strategic priorities by addressing the following elements:

A. **Advance Learning**
   Collect and disseminate accurate, time appropriate and easily accessible information, appropriate referrals, assistance and off-campus housing service to support student learning and student recruitment, retention and graduation.

B. **Amplify the Wisconsin Idea**
   Design, conduct and promote educational and informative campus tours, visits and other learning programs.

C. **Promote Research Efforts**
   Showcase UW-Madison’s preeminent research and public service activities through information delivery, tours and other promotional venues.

D. **Improve Campus Climate**
   Integrate technology and customer service in programs and services to best serve all clients in a welcoming, inclusive and engaging manner.

E. **Adopt Continuous Improvement Principles**
   Apply research principles, conduct regular evaluation of client needs, identify market niches, adopt continuous program and service improvements, and embrace best policies and practices approaches.

F. **Nurture Human Resources**
   Strive for excellence and creativity by enhancing diversity, strengthening leadership, promoting professional development, and fostering campus and community relations.
**Strategic Directions**

A. Optimize Leadership
   1. Integrate operational planning, budgeting, continuous improvement, and best policies and practices in all areas
   2. Apply data based decision-making in all areas—needs assessment, market research, client definitions and counts, focus groups, communications audit
   3. Practice information sharing
   4. Encourage professional development
   5. Diversify financial support
   6. Promote programs and services to on- and off-campus individuals and organizations

B. Strengthen Campus Information Systems
   1. Improve and promote the CIVC Lookup system and facilitate the management of general campus information
   2. Expand and promote web-based services
   3. Promote premier off-campus housing program
   4. Enhance relationships with on- and off-campus visitor organizations, housing-related organizations, and student affairs units that will improve programs and services

C. Encourage Visitors to the University
   1. Improve and promote the campus tour portfolio and other visitor experiences
   2. Advocate for visitor amenities, such as parking, wayfinding, and publications
   3. Promote the campus as a visitor destination
   4. Facilitate relationships and efforts among campus visitor destinations

D. Support Student Development
   1. Collaborate with student affairs units to assist in students’ transition from high school to UW-Madison
   2. Connect students with time appropriate information and resources to support student development
   3. Expand and promote the off-campus housing program to aid students in their transition
   4. Promote programs and services
Interrelation Diagram of Core Functions

Staffing

Meetings

Student Staff Duties

External Relationships

Support Functions

Leadership & Administration

Communication & Marketing

Data Management

CODE
Out = a driver:
causes something to happen
at other function

shared:\new projects\civc\interrelationships
12.18.01
Sample Short- and Long-term Goals

CIVC Short Term Priorities: April 2002
- Weekly Staff Meetings
- Weekly meetings for Sara, Nancy, Geoff, Wren
- Weekly individual meetings with supervisor

<table>
<thead>
<tr>
<th>Improvement Priorities</th>
<th>Wren</th>
<th>Sara</th>
<th>Nancy</th>
<th>Geoff</th>
<th>Cheryl</th>
</tr>
</thead>
<tbody>
<tr>
<td>Red Gym Issues (2 months)</td>
<td>Web site updating and numbers (2 months)</td>
<td>Caller/Walk-in tally system (2 months)</td>
<td>Update housing application (6 months)</td>
<td>Update housing application (6 months)</td>
<td></td>
</tr>
<tr>
<td>Get the word out about CIVC (2 months)</td>
<td>Brochures (2 months)</td>
<td>Info Supervisor Role (by August)</td>
<td>Self-guided tour pub (2 months)</td>
<td>Training on tour programs</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Maintenance Priorities</th>
<th>Tour Guide Program</th>
<th>Group Tour Program</th>
<th>Info Staff Program</th>
<th>Info system Computer Issues</th>
<th>Off-Campus Housing Listing Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Publication updating</td>
<td>Off-campus housing program</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| On-deck Improvement Priorities | Advisory council Numbers reports Academic Staff Evals | Program Marketing strategy Ask Bucky | Integration of tour and info staffs | Fall publication for new students (info to go?) | Off-campus housing listing service marketing |

CIVC Three to Six Month Priorities
- Combine and redesign web site, monitor web usage stats
- Re-engineer publication fulfillment and distribution processes
- Expand information student supervisor role
- Clarify role in Red Gym building issues and On Wisconsin reservation process
- Develop and implement comprehensive caller and walk-in data collection strategy
- Update off-campus housing application to be used on all computers and move to client data entry
- Spread the word about CIVC to critical campus and community contacts
- Enhance group tours database
- Publish new prospective student self-guided tour
- Host CIVC Open House for faculty and Staff

Six to Nine month priorities
- Integrate info and tour staff roles
- Transfer Ask Bucky program to Sara Jung
- New academic staff evaluation process
- Form Advisory Council
- Information and referral service marketing
- New student publication for Fall 2002
- Off-campus housing program marketing
- Monthly reporting of client counts