

# SAUTTER AWARD PROPOSAL

For Innovation in Information Technology or for Achievement in University Computing

**PROJECT TITLE:** UCLA's Help Desk Consortium

**SUBMITTED BY:**

**Dawn Canfield: IT Manager**  
 Email: dawnc@psych.ucla.edu  
 Department: Psychology  
 Department Address: 3277 Franz Hall MC156304  
 Phone: 310-794-9323 Fax: 206-5895

**Mike Lee: Director of Education Technology**  
 Email: mikelee@ssc.ucla.edu  
 Department: Social Sciences Computing  
 Department Address: 2041 Public Affairs Bldg MC 147006  
 Phone: 310-825-6728 Fax: 310-825-4936

**Scott MacKnight: IT Manager**  
 Email: scott@law.ucla.edu  
 Department: Law School  
 Department Address: 1242 Law Bldg MC 147602  
 Phone: 310-206-3446 Fax: 310-267.1895

**Stacey Rosborough: IT Manager**  
 Email: srosborough@orl.ucla.edu  
 Department: Residential Life  
 Department Address: 308 Bradley Hall,  
 417 Charles E Young Drive West MC 137507  
 Phone: 310-206-3699 Fax: 310-825-0994

**PROJECT LEADERS:** HDC Board Members

\*Founding members are noted with asterisks and have made on-going or multi-year commitments.

<b>Alberto Alquicira</b> 2010-2011 VP for Special Projects and Lab Manager, Social Sciences Computing	<b>Hania Brooks</b> 2009-2011 Treasurer and Help Desk Analyst for Info Tech Svcs.
<b>*Dawn Canfield</b> 2008-2009 President and IT Manager, Department of Psychology	<b>Andy Castaneda</b> 2010-2011 VP Information Systems and Computer Technician, Info Tech Svcs.
<b>Linda Holmes</b> 2009-2010 Recorder/Secretary and Customer Service Mgr, Anderson School	<b>Dennis Jong</b> 2010-2011 Recorder/Secretary and Systems Analyst, Office of Residential Life
<b>Tim Kang</b> 2009-2010 VP for Information Systems and Helpdesk Coord., BruinOnline	<b>*Mike Lee</b> 2010-2011 President and Dir Edu Tech, Social Sciences Computing
<b>Scott MacKnight</b> 2010-2011 President-Elect and IT Support Manager, UCLA Law School	<b>Cathy McCann</b> 2010-2011 Events/Outreach and Helpdesk supervisor, Department of Psychology
<b>Jessica Mentesoglu</b> 2010-2011 Instructional Computing and Programmer Analyst, Library Info Sys	<b>*Stacey Rosborough</b> 2009-2010 President and IT Manager, Office of Residential Life

**CUSTOMERS:** UCLA IT Community; HDC members and sponsors

**TIMEFRAME:** Pilot year, fiscal 2008-2009,  
August 2009 and forward – on-going, indefinitely

**TECHNOLOGY USED:** Web services for public website, Moodle, Facebook, Twitter, Knowledge Base, Mailman List, Safari Books, SkillSetsITonline, Microsoft IT Academy

### **History:**

In July of 2004 the Help Desk Consortium (HDC) was a loosely gathered group of IT professionals who worked at or with a front-line campus Help Desk. The Consortium was originally envisioned as an email list of employees who met once or twice a year when Jackie Reynolds, then Director of Campus IT Services in the department of Administrative Information Services coordinated meetings. This model of informal communication worked well from 2004 – 2008 but as budget cuts loomed and IT staff members became increasingly interdependent they found it helpful and often necessary to draw experience, resources and practical help from colleagues in other departments.

In 2008 the founding members of the new consortium suggested that a board of directors be added to the HDC in order to institutionalize some of the Help Desk activities and processes that were being shared ad-hoc. This group also wanted to provide recognition and professional development to their colleagues.

### **1.0 Summary**

This project added a governing board to the existing Help Desk Consortium. A proposal entitled: **HDC: Bridging IT Service and Support Centers at UCLA**<sup>1</sup> helped launch this new effort.

The new structure encourages the sharing of good operational practices among support units and computing labs striving to provide commonality in IT service delivery. It is also an early warning system monitoring IT issues “at ground level” that impact UCLA as a whole.

Finally, we provide professional and technical development opportunities for IT staff. This produces a more institutionally involved and personally integrated staff. Members from disparate departments work together on campus-wide projects and participate in training, demos, and “Brown Bag” sessions sponsored by the HDC.

## **2.0 Project Description:**

### **How it is structured:**

The HDC Governance model emulates that of UCLA Staff Assembly<sup>2</sup>. The founding members of the HDC benefited from prior experience as board members with Staff Assembly, and the methods and values learned there greatly influenced the development of the HDC board structure. The HDC Board's inaugural year began with the appointment of 7 board members and meetings to identify specific, measurable goals for the year. A modest budget (\$4000) was also established to fund board activities and the scholarships and awards program.



*HDC Monthly Board Meeting, 2010*

### **Importance of Relationships:**

The board also wanted to partner closely with other existing campus computing groups and included these groups in its outreach and announcement efforts. Members of the following groups received notices and meeting invitations to help foster trust and collaborative working relationships. Brief examples of some of our specific collaborative efforts are noted in parenthesis.

- CSCs – Computer Support Coordinators (HDC coordinated joint "All Members" meetings with this group)
- Programmers Exchange (HDC shares their Help Desk directory database)
- Campus Web Publishers (HDC partnered with Social Networking expert from Campus Web Publishers)
- Green IT (HDC helped promote recycling of Ewaste with ERS<sup>3</sup>)
- Lab Managers (requested inclusion as a sub-group of the HDC)

The HDC members know well the value of fostering good relationships with their peers. As noted in a recent Educause article "Sweating the Assets for Smarter IT Support," we agree that support for technology demands that all campus IT staff value frequent and respectful collaboration:

*"Support is the connective tissue between people and technology. In a culture of pervasive information technology, the role for support becomes virtually limitless: any user of the technology is a potential client.."*

*"IT staff in departments — at the edge — bring to the support effort the particular knowledge and expertise that serves their specific schools and departments. .... Finding the balance of what is best done at the edge and what is best done at the center requires effective collaboration and at all levels. Underpinning the value provided at the edge is the power of the personal relationships."*<sup>4</sup>

### **Promoting Communication:**

The HDC is using a variety of technologies to communicate. It has established social networking sites on Facebook and Twitter. The HDC also uses an email list (hosted by Bruin Online, using Mail Man) for sharing information with all members. However, the main repository for anything related to the HDC is its public website.<sup>5</sup> The board established this functional website in true collaborative nature. The site is hosted by OIT and maintained by the consortium board members. Some of the resources that can be found there are listed below.

- links to UCLA's Knowledge Base and Safari Books on-line
- list of campus help desks and their ticket tracking systems
- list of departmental computer support coordinators
- links to invitations for meetings and special events
- Board meeting minutes

The website along with other social networking tools has helped accelerate communication among Help Desks and in fact, all UCLA IT staff.

The HDC has been successful in promoting interest beyond Help Desk staff and has increased its membership over the last year. Current membership includes IT employees ranging from student technical assistants to security administrators and vice chancellors.

The consortium is committed to frequent and transparent communication in person as well. Board members have been invited to participate in meetings and discussions of campus-wide technical issues and have provided input and advice as requested.

We believe that our focus on communication promotes a better prepared and more resourceful IT staff. Operational efficiency is improved because members who are well known to each will receive quick and reliable feedback from their peers, enabling them to respond to their customers with rapid confidence.

### **How work is coordinated and projects completed:**

Recognizing that board members need practical help accomplishing their goals, 7 sub committees were created to facilitate the work, and maximize participation from the group at large. Following is a summary of these groups and their primary intentions.

#### **1) Brown Bag Users Group (BBUG) *Led By Cathy McCann***

The purpose of this group is to meet in a relaxed, informal setting to share and discuss ideas. Meetings are held approximately monthly and have been attended by 10 – 20 individuals regularly. The "Brown Bags" are frequent, brief, and held on a reliable schedule. They provide a great forum for quick information sharing and lunch time sessions are not an administrative burden to schedule or attend.

#### **2) Microsoft IT Academy *Led By Mike Lee/Scott MacKnight***

Through the Microsoft Consolidated Campus Agreement, the HDC purchased a discounted subscription to Microsoft IT Academy. The goal of the project is to provide basic and advanced training for a comprehensive set of Microsoft applications and products through MSITA's E-learning modules for staff, faculty, and students. The board is responsible for provisioning and delivering the course material by maintaining the Microsoft IT Academy collaboration site on UCLA's Common Collaboration Learning Environment (CCLE).

#### **3) IT Scholarships and Awards Committee *Led By Scott MacKnight and Stacey Rosborough***

The IT Awards and Scholarships Committee strives to provide a means of recognizing the ongoing training and development needs of IT personnel, and to provide individuals with specific training goals the funds to complete training.

Awards and Scholarships are provided once annually through a competitive application process. Since many departmental training budgets have been reduced or eliminated, the board was very pleased to provide these awards to help absorb some of the shock of these cuts. This year, the HDC sent six lucky recipients to a one-day Customer Service Seminar presented by the Help Desk Institute (HDI).



*Cathy McCann receives HDC Professional Development Scholarship from Vice Provost, Jim Davis  
5/20/2011*

#### **4) IT HR Committee** *Led By Jackie Reynolds*

The IT Human Resources (HR) group strives to respond to the training, development, and HR support needs of IT staff. A primary focus of this committee is to assist campus IT professionals who are seeking employment/re-hire because of potential layoff situations. Individuals looking to change career paths and for those exploring other professional opportunities at UCLA would also find benefit of this group. ITHR looks at the human resources needs for our changing IT environment, provides resources and recommendations for development and training, coordinates with potential mentors and project teams, and helps review resumes and development plans.

#### **5) Knowledgebase (KB)**<sup>7</sup> *Led By Mike Lee*

Realizing that quality communication and frequent collaboration maximizes efficiency, the HDC is now the new caretaker of this custom designed KB, hosted in the department of Social Sciences Computing. The UCLA KB is an essential communication tool to all campus IT professionals. It provides the means for the computerized collection, organization, and retrieval of a vast array of operational know-how from the entire campus. The HDC promotes use of the Knowledgebase on campus, adds new features, and increases visibility. Utilization of the KB is another opportunity to help build a better prepared and more resourceful IT community.

#### **6) Lab Managers' Committee** *Led By Jessica Montesoglu and Alberto Alquicira*

The Lab Managers' group was recognized as a committee of the Helpdesk Consortium as of June, 2009. Comprised of approximately 40 members, this group shares information relevant to the operation of student computing facilities, provides a base of expertise for troubleshooting advising, and serves as a forum for referring faculty and students to resources that can help them. Although each lab may have different goals, we share knowledge to offer students and faculty the most consistent service possible.

#### **7) Top 5 Subcommittee** *Led By Scott Mac Knight*

The Top 5 Project from 2008-2009 collected the top 5 "pain points" each month from over 30 Helpdesks using a voluntary online survey. The goal was to look for patterns of responses that may suggest opportunities where previously unseen systemic issues might benefit from additional tools.

#### **More on Relationships; Volunteerism and Team Building:**

Though not a requirement, many of the consortium members are friendly, spirited, and community minded. Many recently volunteered to participate in a half-day event to train and assist university emeriti with their personal computing issues.

In March of this year members also participated in the annual **UCLA Iron Bruin Triathlon**<sup>8</sup> either as athletes or supporters of Team HDC. The race encourages

5/20/2011

participation from students, staff, faculty, and alumni. Supporting each other in this event promoted camaraderie and true teamwork among the HDC members, all of whom came from different IT departments and offices all over campus.



*Team HDC represented by Mike Lee, Leslie Whitmore, and Terence Young*



*Team HDC Supporters: Dawn Canfield, Lisa Kemp Jones, Jackie Reynolds, and Linda Holmes*

The Help Desk Consortium has become a friendly, trusted, and valuable resource at UCLA. With support from its members and sponsors we hope to see it flourish. In addition to the board members listed as Project Leaders in this application we would also like to thank and acknowledge our sponsors Jim Davis and Jackie Reynolds. Thanks also to other HDC members who are mentioned or pictured in this application: Cathy McCann, Leslie Whitmore, Lisa Kemp Jones, Lawrence Lu, and Terence Young.

### **3.0 Objective customer satisfaction data**

We issued an anonymous, on-line survey asking questions about the value and relevance of the HDC. We had an 18% response rate from our current members. Summarized results follow.

1. Was the information presented at the HDC All Members Conference useful?
  - a. 96.4% of the respondent found the conference to be at least somewhat useful
  - b. 60.7% found most or all of the information useful.
  
2. Please rate your experience of the HDC BBUG
  - a. 73.3% found the BBUG to be favorable to very favorable
  - b. 20% of the respondents have not attended a BBUG
  
3. How frequently do you visit the HDC Website
  - a. 26.7% never
  - b. 56.7% at least once a year
  - c. 10% once a month
  - d. 3.3% once a week
  - e. 3.3% other
  
4. How frequently do you visit the UCLA KB
  - a. 6.5% never
  - b. 25.8% once a year
  - c. 38.7% once a month
  - d. 25.8% once a week
  
5. The HDC Scholarship and SkillsetsITonline courses provide members with opportunities to further develop IT and Professional skills.
  - a. 87.1% of responding members agree or strongly agree with this statement
  
6. The HDC Email List is a useful tool for sharing Helpdesk-related information and announcements
  - a. 22.6% found it somewhat useful
  - b. 77.4% found it to be useful or very useful

We received some additional, open comments regarding the Member's Conference and other meetings or brown bags we hosted. People still feel very isolated from executive decisions and their overriding consequences but they indicate that meetings/brown bags serve a good forum for obtaining "face time" with cohorts around campus. People also seem to like the causal, unstructured format of the

5/20/2011

brown bag meetings saying that they are a good way to relax and just chat with fellow staffers. A suggestion was made to add more educational topics and presentations on what people are doing on the practical side of things.

Members also indicated that they think the Scholarship program is great. A suggestion to try to award scholarships earlier in the fiscal year is right on the mark and will be investigated for next year's program.

Another measure of customer satisfaction can be found in mentions of the HDC in UCLA Today, the staff and faculty newsletter. Excerpts from two articles follow.

"Help Desks Helping Themselves" UCLA Today, January 2009<sup>9</sup> explains how the HDC Benefits IT Managers

*"Said Mike Lee, IT director for Social Sciences computing, "Technology is moving so fast ... It's really easy to fall behind. But as you expand your network, you see what's out there, how other people are doing things. It's (The HDC) a reciprocal relationship."*

*"And in the current tough economy, the consortium is especially good for the bottom line. Joel Bellon, assistant director for IT for the Career Center, said, "We are a small department and don't have a lot of resources, but what we try to do is actively leverage the campus resources." For example, when the Career Center needed a wireless network, Bellon said, "I didn't have to build my own. I'm actually using campus wireless."*

"Helping IT Staff keep pace with technology" UCLA Today, February 2010<sup>10</sup> highlights the value in the HDC Scholarship program

*"Wilson had been thinking for some time about training for certification as a Microsoft Certified Desktop Support Technician, but cost was an issue until he applied for and received a \$350 HDC scholarship. That "pushed me to do something that I wouldn't have done otherwise," Wilson said. "I am glad I did it. And now I'm motivated to do more, to get further certifications."*

## Notes

1. See: [http://www.hdc.ucla.edu/docs/hdc\\_pitch.pdf](http://www.hdc.ucla.edu/docs/hdc_pitch.pdf)
2. See: [www.staffassembly.ucla.edu](http://www.staffassembly.ucla.edu)
3. See Electronic Recycling Solutions –ERS: <http://www.ers2recycle.com/>
4. Sue B. Workman, "Sweating the Assets for Smarter IT Support, " EDUCAUSE Review, vol. 44, no. 5 (September/October 2009): 44–55  
<http://www.educause.edu/EDUCAUSE+Review/EDUCAUSEReviewMagazineVolume44/SweatingtheAssetsforSmarterITS/178415>
5. See: [www.hdc.ucla.edu](http://www.hdc.ucla.edu)
6. See: <http://www.skillsetsitonline.com/>
7. See <http://www.kb.ucla.edu>
8. See: <http://www.triathlon.ucla.edu/about.php>
9. See: <http://www.today.ucla.edu/portal/ut/help-desks-helping-themselves-79829.aspx>
10. See: <http://www.today.ucla.edu/portal/ut/helping-it-staff-keep-pace-with-153360.aspx>