By Deanna B. Marcum and Brian L. Hawkins

The Frye Leadership Institute: A Unique Opportunity for a Unique Problem

The digital environment is transforming higher education and creating unprecedented challenges for campus leaders. It is clear that people with new competencies and fresh perspectives are needed to manage this change—people who can bring a new framework to our historic enterprise. Recognizing this need, the Council on Library and Information Resources (CLIR), EDUCAUSE, and Emory University developed the Frye Leadership Institute to provide continuing education opportunities for individuals who currently hold, or will one day assume, positions that make them responsible for transforming the management of scholarly information in institutions of higher education. The Frye Leadership Institute, supported by the Robert W. Woodruff Foundation, The Andrew W. Mellon Foundation, and the Institute of Museum and Library Services, is expected to be a ten-year program.

Forty-three librarians, information technologists, and faculty members gathered at Emory University on June 4, 2000, for the opening of the first Frye Institute. Both the participants and the deans—Richard Detweiler, president of Hartwick College, and Deanna Marcum, president of CLIR—felt some apprehension as they filed into the auditorium of the conference center on the Emory campus. Since this was the first Institute and the first time that librarians, information technologists, and faculty in a variety of leadership and administrative roles had been brought together to consider leadership issues, no one knew quite what to expect.

Any concerns of either the deans or the participants were quickly dispelled with Chancellor Bill Frye's opening address. From then until the farewell lunch on June 16, the participants, Institute faculty, and deans were intensely and personally engaged in gaining a better understanding of leadership in higher education in today's digital environment. The deans introduced a new topic each day, and university presidents, faculty members, students, financial officers, and association executives took turns facilitating sessions that stimulated discussion and promoted learning.

The Institute had actually begun even before participants arrived on the Emory University campus. Each person selected for the Institute was assigned to interview important administrators on his or her campus, asking about their views on the changes taking place in higher education, as well as their visions for the future. With these data as background, participants then spent the first day of the Institute formulating and discussing their own ideas regarding the provision of campus-wide information services and offering impassioned views about the roles and responsibilities of librarians, information technologists, and faculty in promoting teaching and learning in the new digital environment. The participants began to observe the organizational, attitudinal, and systems changes that must be realized and the kind of leadership that will be necessary to effect these changes.

In the first days of the Institute, university and college presidents, provosts, faculty, and financial officers offered personal perspectives on the changing landscape of higher education and spoke of their own methods of meeting the challenges. Some thirty-one Institute faculty then led discussions on a range of topics, including scholarly communication, intellectual property and copyright, public policy, technological developments, university governance, student life, teaching and learning, and management.

Throughout, time was scheduled for informal conversation with the Institute faculty. Meal times proved to be an important opportunity to arrive at deepened understandings. Participants—who came from the largest research universities, comprehensive universities, liberal arts colleges, and community colleges—took pleasure in the discovery that they had so much to learn from one another. Listserv communication and gatherings at professional meetings such as EDUCAUSE and the American Library Association will sustain the bonds formed among the participants.

Since the Institute is a year-long project for the participants, time was built into the program for developing and refining the practicum project that each participant will carry out on his or her home campus. Institute faculty, deans, and fellow participants were all available as advisers on the projects.

The evaluations of the first Institute were overwhelmingly enthusiastic. Participants rated the program as uniformly excellent. Their words reveal the intensity of the experience:

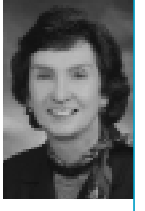
I was not sure exactly what to expect from the Institute, but I am happy to say that I left Atlanta on Friday forever changed. On a very personal level, the Institute confirmed my determination to exert leadership in my own institution and in the broader community of American higher education through the knowledge that I gained, the network of friends and colleagues that I acquired, and the deeper understanding of leadership that I developed.

Without qualification, this was the best professional-development event I have ever attended.

In my twenty-two years as an academic librarian, nothing, NOTHING, that I have done has been as meaningful, as powerful, as my participation in the Frye Institute. . . . It has been a transforming event for me, and I daresay for my cohort group in the Frye Class of 2000. I find myself thinking of what we talked about several times each day. I refer to my notes constantly. I have been reading many of the documents referred to by the excellent cadre of speakers you gathered for us. While it has only been a week, I feel what I learned has already changed my library and my role in the institution.

The experience was delightful, amazing, and transforming. . . . I particularly appreciated the exceptional quality of the program, the access to the experts, and the bravely honest discussions of leadership issues among faculty, participants, and guests.

Plans are now under way for the second Frye Leadership Institute, scheduled for June 3–15, 2001, at the Emory University Conference Center in Atlanta, Georgia. Application forms—available on the Web site at <http://www.fryeinstitute.org>—are due by December 15, 2000.



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By Eric Bird

Ensuring Quality at the Helpdesk

Ensuring quality service from front-line support staff at the helpdesk is an ongoing challenge, but measuring and assessing quality can be half the battle. This column discusses some of the various ways to measure, assess, and ensure good performance.

Take Advantage of Your Tracking Database

Even the smallest helpdesks should maintain a tracking database of some sort, and even the most basic databases offer a plethora of reports from which managers can derive some performance metrics, such as average length of time to close tickets, number of calls typically logged during a particular period of time, and even which staff are handling the most calls. But just as the McDonald's cash register shows the average time spent serving each customer—in seconds—a quick turnaround time does not ensure a quality response. And the fact that one staff member closes more calls per day than another may not mean much either; that staff member may simply gravitate toward simpler issues, passing more complex problems to other staffers. That is not to suggest, however, that the data provided by the reports is useless; it just needs to be used properly and as part of an overall quality-assessment system. Two factors are key in this regard.

First, involve everyone, helpdesk staff and managers alike, in reviewing performance data on an ongoing basis and in taking responsibility for it. Use the more general metrics as an ongoing discussion topic at staff meetings. For instance, on a monthly basis, review the call volume and the length of time to close tickets (average, minimum, and maximum); then compare these numbers to those of previous months. Use the data as a feedback, planning, and motivational tool. Is call volume growing? Perhaps you need more helpdesk staff. Does call volume peak at certain times of the day or times of the year? You can shuffle your schedules accordingly. Are you satisfied with your response time? If not, how can you improve it? Has response time changed over the last few months? If so, why? Use these questions as discussion points for ongoing group self-assessment, thus allowing staff to take some ownership of the long-term outcome.

Next, use the more specific metrics in one-on-one meetings with staff. Don't wait for the annual performance review; do this on a regular basis. Again, use the data as a tool for providing feedback and motivation, providing an opportunity for the staff member to set personal goals and to take ownership of the outcome. For example, if an individual expresses a desire to become more proficient in a particular topical area, then over time he or she should be taking more calls of that type.

Throughout, an important element is to enable and encourage staff members to review the data themselves on an ongoing basis, *before* they meet with a manager or as a group. By getting in the habit of watching the metrics themselves, staff can feel involved in both their personal progress and the group's overall status and will not be surprised or feel the need to be defensive when the data is discussed in the manager's presence.

Second, evaluate metrics in context, recognizing the complexity of their meaning. Just as important as monitoring the metrics is evaluating them appropriately. The key is to discuss everything in context. During a system-implementation process, for example, not only is call volume bound to increase but response times will lengthen as well. This might occur because the support staff is still learning the product themselves or perhaps because they frequently need to speak with the programming or implementation staff to resolve user issues.

Also, recognize that goals may not be as obvious as they seem. We might assume that fewer calls and faster response times are better. But perhaps previously dissatisfied users have stopped calling, or maybe you are giving quick-and-dirty answers to problems that deserve a little more thought. This suggests that desired outcomes are not as clear-cut as they might initially appear, a fact that needs to be acknowledged throughout all metric-related discussions.

The same is true for the metrics used to measure individuals. If a staff member's average number of calls per day has decreased over time, maybe he or she has been taking more challenging calls; recognize that achievement. If an individual's average number of calls is substantially higher or lower than the average for the entire group, discuss that as well—realizing that there may be an explanation that has nothing to do with productivity.

Design a Survey Instrument

Surveys, if designed and executed properly, can also be a useful tool and can provide another feedback mechanism to assess the quality of service. When designing the survey itself, consider the following:

- *Allow for a mixture of both qualitative and quantitative responses.* The quantitative responses (e.g., "On a scale of one to six, how would you rate...?") are useful when aggregating the results. The qualitative responses will, however, provide the most insight. I recommend allowing a few lines for comments after each quantitative question to allow people to explain their answer if they wish.
- *Don't allow a "medium" response.* When creating quantitative responses, provide a range that has no "middle" number (e.g., use 1 to 6 instead of 1 to 5). This will force respondents to quantify their decisions as either positive or negative. If you like, you can add a "don't know" option.
- *Collect some demographic information.* Ask for the name of the respondent's department and perhaps for the length of time the respondent has been with the school. This will allow you to categorize responses later; perhaps you'll find that some departments perceive better quality than others. That will be good information to follow up on.
- *Involve your staff.* Perhaps the most important part of the survey design process is to ensure that your staff members don't feel threatened by the survey. Involving them from the start, and telling them how it will be used, can minimize any perceived threat.

As the results come in, share them with the helpdesk staff as quickly as possible. Whenever possible, provide the "raw data"—good and bad—rather than processed results. Allow surveys that make positive references to individuals to circulate within the group but hold back from general circulation those surveys that have negative comments specifically directed toward a particular individual. (You may want to address some or all of those comments, but they need be shared only with the individual named.)

If the survey is not as positive as you would like, use it—in conjunction with your staff—as a diagnostic tool. For example, you may ask: "Why are people saying we take too long to get back to them, and how can we change that?" Set a goal to improve those areas that received negative feedback in time for next year's survey (and make sure to do a survey again next year).

Finally, publish the survey results, along with your plans for improvement, for the rest of the community—not just the information technology department—to see. Show your staff and your peers elsewhere in the university that you stand behind the results and are willing to publicly acknowledge that there may be areas needing improvement.

Be Creative

Combining the tracking database data with a survey instrument provides a good, but still vague, assessment of quality. You'll need to find other means to fill in the gaps. For instance, you may want to make occasional "quality control" visits or phone calls to staff members in other departments. A five-minute phone call or fifteen-minute visit will often provide a great deal of information that no survey or tracking database can offer.

Consider attending a student government, faculty senate, department, or support staff meeting. Place yourself on the agenda; make a brief presentation about the helpdesk, and open up the discussion to questions. As long as you limit the scope of the discussion to strictly helpdesk-related issues, simply providing the forum for people to speak will allow for the feedback you need. Bring a few staff members with you to the meeting so that they can hear first-hand what is being said.

Think Long-Term

A thorough quality-control strategy involves collecting a lot of data. This data needs to be assessed over the long term: what are the trends, and where are the problems? Short-term blips, though initially far more troublesome, are in fact much less critical. A long-term strategy, using a variety of assessment tools, will best enable the helpdesk to provide high-quality service to your community.

The helpdesk is perhaps the most publicly visible element of your IT organization. Using these tools to measure and monitor quality, you can ensure that your helpdesk is providing good service to your community, in an environment that allows your staff to take pride in their work.

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