A Galaxy of Change

**FinancialAid &
Veteran Services
5 Year Program Review**

June, 2015

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Financial Aid

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Veteran Education Benefits Office

Introduction

The Financial Aid Office (FAO) at Portland Community College (PCC) is responsible for providing need-based federal and state aid to students seeking a college degree or eligible certificate. Portland Community College enters into agreements with the Department of Education (ED) and State Agencies that allow Portland Community College to participate in student aid programs as an eligible institution under the Higher Education Act of 1965, as amended (HEA).

Mission, Values and Goals

The Financial Aid Program's Mission is to support student access and success by committing to removing the financial barriers for those who want to pursue postsecondary education, and supporting each student admitted to our institution. It does this by assisting students in applying for financial aid funds and delivering aid in a timely fashion.

Financial Aid Program Values exemplify the highest level of ethical behavior and demonstrate the highest level of professionalism. The Financial Aid Office provides services and upholds principles that do not discriminate on the basis of race, gender, ethnicity, sexual orientation, religion, disability, age, or economic status.

The Financial Aid Program goal is to help students achieve their educational goals through financial support and resources.

Corresponding Institutional Mission, Values and Goals

College Mission: Portland Community College advances the region's long-term vitality by delivering accessible, quality education to support the academic, professional, and personal development of the diverse students and communities we serve.

College Values: An environment that is committed to diversity as well as the dignity and worth of the individual; leadership through innovation, continuous improvement, efficiency, and sustainability; leadership through the effective use of technology in learning and all College operations; quality, lifelong learning experiences that help students to achieve their personal and professional goals; continuous professional and personal growth of our employees and students; collaboration predicated upon a foundation of mutual trust and support; promoting economic development and providing for the public's trust by effective and ethical use of public and private resources.

Institutional Goals: Diversity: Lifelong learning opportunities will be accessible to all and enriched by the diversity of our students, faculty, and staff; support services that provide the foundation for student skill development, degree completion and university transfer.

Sustainability: Effective use and development of college and community resources (human, capital and technological) will contribute to the social, financial and environmental well-being of communities served.

General Program Description

Staffing

The Financial Aid Office is staffed by 28 full- and part-time staff (Appendix A) comprising one Manager, 15 Academic Professionals and 12 Classified personnel. The Manager is also responsible for the Veterans Services Office reported in the second half of this review. (see Appendix E: Organizational Chart)

Budget

The operational budget for the administration of federal, state and veteran student aid programs is $2,598,611. In addition, the Financial Aid Office has the fiduciary responsibility for and budget management of the annual delivery of approximately $160 million in federal and state aid.

Space/Locations

The Financial Aid Office is represented at each of the four district campuses: Cascade, Rock Creek, Southeast and Sylvania. Each office is located in the Student Services Answer Center area. The Cascade, Rock Creek and Southeast campuses are staffed each with three Financial Aid Professionals. Remaining staff are located at the Sylvania campus.

Menu of Services

The Financial Aid Office includes but is not limited to the following services. All services are provided equally throughout the District and follow prescribed policies and procedures.

- Provide consumer information to current and prospective students
- Assist students with the federal application process using the FAFSA
- Verify student application data and certify student eligibility
- Provide notifications of eligibility and cost of attendance
- Authorize the disbursement of federal and state aid
- Monitor student progress to ensure continued eligibility

Interim Dean of Student Affairs
Tammy Billick

Vice President of Academic & Student Affairs
Dr. Chris Chairsell

Student Systems Manager
Jody Potter

Director Financial Aid & Veteran Services
Bert Logan

Senior Office Assistant
Kathy Pappas

Fin Aid Coordinator
Clarice Anderson

Financial Aid Advisors
Jessica Krstanovic
Debora Perrault
Mike Holt
Josephine Hunter
Rachael Smith

Fin Aid Coordinator
Phil Hess

Financial Aid Advisors
Regina Broich (0.5)
Lindsay Plesha (0.5)

Fin Aid Coordinator
Sarah Loepker

Financial Aid Advisors
Delores Pruett

Fin Aid Coordinator
Rebecca Lewis

Financial Aid Advisors
Susan Godoy

Assistant Director
Elijah Herr

System Analyst
Rodney Botts
Watasha Stroud

Fin Aid Technician
Carol Patrick
Brenda Lucia
Nita Harris
Sergey Bogdonov
Elizabeth Yarrow
Jessica Diamond (0.5)

Fin Aid Technician
Jason Hua

Fin Aid Technician
Marilyn Newman

Fin Aid Technician
Candice Chastain

Veteran Coordinator
Jeff DeMott

Systems Technician
FY15 Hire

Veteran Specialist
Paula Heinrichs

Veteran Specialist
Neesha Griffiths

Veteran Specialist
Ray Streahl

Veteran Specialist
Robert Hindahl

System | **Sylvania** | **Southeast** | **Cascade** | **Rock Creek**

Professional Development & Leadership Activities

Conferences

OASFAA Oregon Association of Student Financial Aid Administrators - annual

WASFAA Western Association of Student Financial Aid Administrators - annual

NASFAA National Association of Student Financial Aid Administrators – annual

Ellucian – annual

American Association for Financial Education – 2014

Oregon Student Success and Retention Conference– annual

Training Workshops & Meetings

OASFAA Summer Drive-in Workshop

OASFAA Support Staff Workshop

WASFAA Sister Dale Brown Summer Institute

WASFAA Training Workshops

USAF Training Workshops – bi-annual

PCC sponsored events (FERPA, Ethics Law, Non-Harassment, Strategic Planning, Title III)

Webinars sponsored by NASFAA, Department of Education, Ellucian

Oregon Community College Association Directors – quarterly

Ellucian consultant Banner System Training

Monthly Financial Aid Staff Training

Committees

PCC Academic/Financial Aid SAP Alignment

PCC SAP Task Force

Title III Steering/Core Planning Committees

Title III Work Groups

Financial Aid Lean Teams (application processing, direct loan, federal work-study, communication)

Financial Aid Dashboard Technical Committee

Financial Aid Communications Team (FACT)

Financial Aid Answer Center Committee

Prepare Advisory Committee for Panther Path

PCC Financial Aid Advisory Committee

Financial Aid Day Committee

My Refunds Card RFP Selection Committee

OASFAA Conference Committee

OASFAA Support Staff Workshop Committee

OASFAA Newsletter Committee

WASFAA Conference Committee, Training , and Federal Issues Committees

Inceptia School Advisory Board for Financial Literacy

Innovations in Student Services Panel

OCCC Transition

Banner Systems Managers

PCC Hiring Selection Committees

Scholarship Resource Committee

Foundation Scholarship Software Selection Committee

Admissions Term Selection Committee

Title III Trio (ROOTS/Future Connect) Grant Writing Committee

Loan Default Pilot Program Committee

Community-Based Learning Off-Campus FWS Recruitment Committee

Career Connections-FWS Partnership Committee

Fostering Student Success Advisory Committee

PCC Web Scholarship Module Committee

PCC Student Portal Committee

Professional Development & Leadership Activities cont'd

Instructor/Presenter

CG 101 – College Survival

CG 105 – Scholarships for College (Dan)

CG 114 Financial Survival for ROOTS Students (Sarah)

PCC New Student Orientations

High School Financial Aid Parent Nights

Oregon Correctional Institutions Financial Aid Presentations

Title IX Indian Education Project Financial Aid Presentations

PCC District Academic Advising Meeting – New SAP policy

OASFAA/WASFAA Trainer

OASFAA Conference Panel Presenter

OASFAA Support Staff Workshop Presenter

Financial Aid Training (internal)

PCC District Campus Open House

2011 Student Success and Retention Conference - "Improving Access in Higher Education for Students in Foster Care" (Sarah)

Leadership Activities

OASFAA President 2011

Financial Aid Coordinators – Team A/B Leads

Financial Aid Coordinator Program Leads (Direct Loan, Grants/Scholarships, FWS, Study Abroad, Cohort Default Program, Americorp, Consortium Agreements, Chaffee/Ford/Foster Youth Programs)

2011 Foster Youth Summit Planner/Organizer – Sarah

Financial Aid Day Coordinator – Julia, Jennifer, Anna, Jessica K

ROOTS Liaison – Sarah, Jennifer, Rebecca

Future Connect Liaison – Anna, Rachael

FACT – Eli, Phil

Title III Facilitators

Acting Director of Financial Aid 3/10 - Sarah

Co-Chair 2011-12 OASFAA Support Staff Workshop – Delores and Jennifer

Chair 2012-13 OASFAA Conference Site Selection Committee - Bert

Chair Career Connections-FWS Partnership Committee – Dan

Fostering Student Success Program Liaison - Sarah

Internship at Oregon Alliance for Private Colleges (includes written report to board)- Dan

Awards

Financial Aid *Dashboard* – 2nd place Luminis Idol award at Ellucian Live Conference 2013

Commendation, NWCCU – Financial Aid Department

OASFAA Outstanding Financial Aid Professional – Clarice

Outstanding PCC Staff Award (cash) - Phil

Cascade Campus ROOTS Outstanding Staff Award 2013-14 – Sarah

Best Practice Use of Spaces (FACT) Award 2014- Eli

PCC President Certificate of Recognition August 2014 – Eli

Higher Education Achievements

Approximately 30 percent of financial aid staff completed classes at PCC or at four-year universities over the past five years. Three staff earned bachelor's degrees, two earned master's degrees, and one will be completing a doctoral degree this year.

2009-10: Year One

The Foundational Year

Understanding Our Challenges

Five key issues were recurrent in interviews with PCC financial aid staff, students, the campus deans group, advisors and counselors:

Overwhelmed Leadership

The Director did not have time to manage the entire staff, and the department suffered from a lack of supervision, focus and direction from leadership. Operational policies were not consistently communicated to staff, policies were not complied with or understood across the department, and there was no management follow-up to ensure all employees understood and applied policies and procedures consistently. Some employees were not working within their job descriptions. Other employees did not understand the concept of "management rights" and managed their own time (per their contracts); flex time and working from home seemed to be the individual decision of some employees. Regular all-staff meetings did not occur. With the Director unable to manage a large staff and the Systems Manager focused on systems issues, there was no strong leadership presence in the department. The Director did not advocate for the office on campus; the Dean of Student Affairs became the main advocate for the financial aid office.

Poor Communication

Both internal and external constituent groups acknowledged a major concern with the lack of communication about the financial aid process and when students would receive funds. Policies and procedures were not communicated to Financial Aid staff in a comprehensive, consistent way. Students did not understand the process, where they were in the process, and when their aid would be delivered. Communication between campuses and staff was not reliable or consistent. Student communications were not timely.

Inefficient Financial Aid Office Organizational Structure

All staff reported directly to the director, who did not have time to supervise a large department. Some staff acted as informal supervisors but had no supervisor designation in their job descriptions. There was no communication or supervisory structure at branch campuses. Branch campus front line staff were burned out and felt guilty when they were sick as it put pressure on other people for coverage. Policies and procedures were not carefully planned, prioritized or communicated to the district Financial Aid team.

Inefficient Financial Aid Process

There was not a consistent process across all staff and campus locations. The Satisfactory Academic Progress (SAP) policy was confusing to staff and students. Staff were unsure how to handle conflicting information/verification (number in college, income, etc.) leading to inconsistent file reviews. Not everyone in office processed files at the same pace.

Confused Office Environment and Culture

The physical Sylvania campus office space was not student-friendly. Students walked into an atmosphere that reflected the "state local motor vehicles and licensing office" environment where students took a number to talk to a front counter staff person. The Sylvania campus office space was not large enough to house all financial aid staff and technical staff were housed in a temporary space in the library. This physical separation made it impossible to create a team-oriented workplace and resulted in distinct cultures for the technical, coordinator and advisor groups.

Setting the Stage for Systemic Change

In April of 2011 two key actions were taken. 1) The college applied for and received a five-year Title III Grant with specific goals for improving the performance of the Financial Aid Office; and 2) A new Director of Financial Aid & Veteran Services was hired.

The text of the Title III program narrative can be found in appendix __. This grant funding allowed us to acquire resources necessary to improve department performance.

Specific weaknesses to be addressed by the grant were: 3) the overwhelming Financial Aid Office workload, 4) long processing time, and 5) high cohort default rate.

The first action taken was a "shoot from the hip" approach by the new Director of Financial Aid & Veteran Services to get as much money to as many students as quick as possible. This involved addressing issues 3, 4 and 5 above.

By direction, the first shot was at the Financial Aid Office organizational structure which was converted from three teams to two. (Please see Appendix E for the comparison of previous with new organizational structure). This enabled staff to gain more in-depth training and helped to alleviate the consequences of unanticipated absences associated with work load. The change also allowed for a more concise reporting hierarchy.

The second shot was aimed at the inefficiency of the financial aid process. All applications were routed through three distinct approval processes with rigid lines drawn between professional staff. No award could be made without final approval from the smallest number of coordinator staff available (4).This meant that each file had to be "touched" a minimum of three times. Yet each staff position had overlapping job descriptions and therefore had the ability to finalize an award without the necessity of redundant review. Staff members were empowered to make final determinations and satisfy completion requirements in order to allow awards to be made.

The third shot was to eliminate redundant reviews of information, duplicate requests for the same information and to establish an awarding system that allowed files that did not require any action to automatically move to award status.

2011-12: Year Two

The Journey Begins

The LEAN Analysis

In our first year of review and analysis the Financial Aid Office held three week-long LEAN team activities designed to assess how we were conducting current practices and to make recommendations for improvement. The first area reviewed was organizational structure and process improvement.

Day One
- Review of FA operations, and extension of the 2010 consultant report
- Review of FA Department Vision, Mission, and Guiding Principles
- Review of current FA policies and procedures for FA intake
- Process mapping of FA documentation intake

Day Two
- Continued FA Intake-Process Mapping
- Drafting changes to PCC FAO intake policies and procedures
- Developing quality assurance guidelines for the FA intake process

Day Three
- FA verification process mapping
- Drafting changes to PCC FA verification policies and procedures
- Developing quality assurance guidelines for the FA verification process

Day Four
- Redesign of FA technology systems to efficiently and accurately manage FA intake
- Verification of policies and procedures
- Review of district organizational structure for FA intake and verification policies and procedures
- Development of student-centered process to assist students in understanding the FA application process and timeline

Day Five
- Created a work plan and timelines for completing FA intake and verification policies and procedures
- Development of training plan, timelines, and materials
- Development of quality assurance guidelines
- Incorporation of the BCT recommendations in the final work plan

Armed with a the recommendations from Black, Collie and Torver Consulting (Appendix C) and the recommendations from the LEAN process, the Financial Aid Department embarked on a complete revamp of the entire department: its workflow, communications and processing.

Linking Statements

### Mission and Values
Team work and cooperation in an environment that encourages the expression of original ideas and creative solutions.

Panther Path
Understanding where our system was broken helped us to engage students at every phase of the Panther Path.

Strategic Plan
The first step to create a culture of innovation in financial aid , improve opportunity and drive student success.
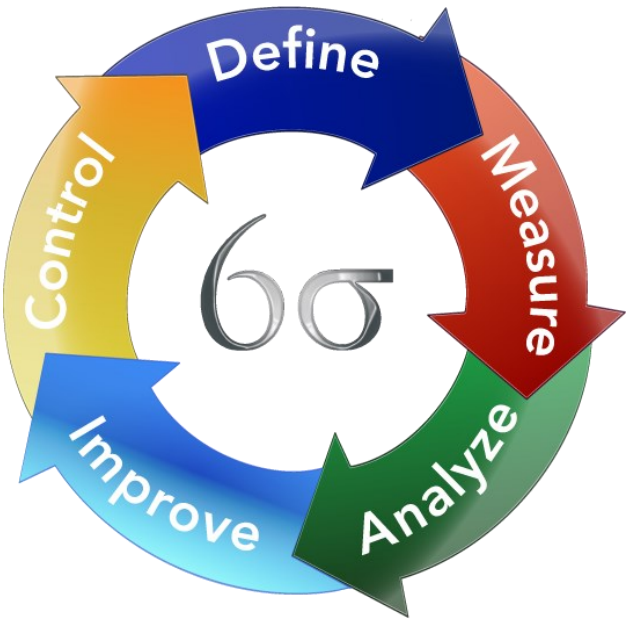
Financial Aid Intake Workflow

As the first step in reshaping financial aid, we decided to focus on our overly-complicated intake and processing workflow. The photo on the right outlines our workflow process for all financial aid issues and requirements. Arrows indicated movements from one state to next state (document state). Reverse arrows show how information was sent to financial aid students (the means).

As the diagram on the right demonstrates, we had a very complicated and rigid workflow. Documents and FAFSA applications were pushed through a very inflexible workflow that was prone to bottlenecks and disruption based on staffing changes. The following guidelines were adopted to help shape new policies and procedures.

- Policies and guidelines for revision, awarding, exceptions will be defined (along with SAP and how these will flow in the intake process).
- QA will consist of organized, regular representative sampling to ensure accurate and consistent implementation of new Policies and Procedures (as well as document guidelines & rules).
- Final processes related to error reports will also be defined; potential solution is FA Advisors running their own error reports (by campus site, etc.) This helps to eliminate "bottle necks" related to final error reports.
- Additional automated communication strategies to students will be incorporated into this process.

By analyzing our workflow, we were able to simplify our document intake and tracking from fourteen steps to seven:

Step 1: Download FAFSA and automated requests for documents needed for "C" Flags

Step 2: Students submit documents (electronically via Axiom or other processes); coded – "N" for needs review

Step 3: One district student work queue, with reports that identify everything that needs review
Please Note- Current Intake and Advisor Review criteria integrated. (These already exist.)
All documents have intake guidelines and rules for completion. (These drafted by Lean Team)

Step 4: Take action where additional information is needed

Step 5: If information is complete and accurate (according to document guidelines), satisfy as complete, and complete intake. When last document is satisfied, check-off for verification, indicating that all previous documents were reviewed by FA staff following FA document guidelines.

Step 6: System batches package: auto-denial, auto sign-off.

Step 7: Secondary reviews are made for those students not auto-awarded. This could be due to dependency issues, SAP, timeframe, etc. All issues that need "professional judgment" are moved to a FA advisor. Guidelines exist for each document that delineates common examples of "professional judgment" for that data issue. Once there is a human sign-off for secondary review issues, student moves directly to batch packaging (since the secondary issues are completed and verification is affirmed.)
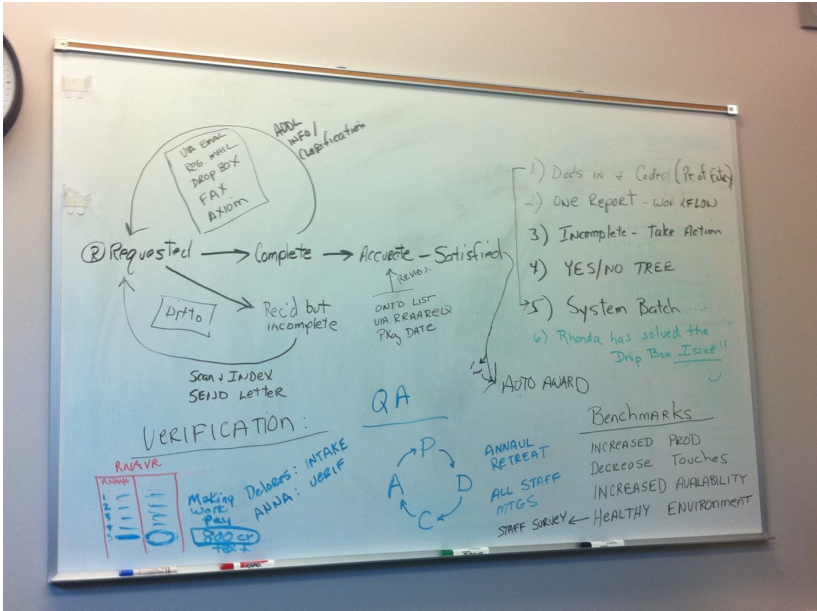
The Financial Aid *Dashboard*

The Financial Aid *Dashboard* gives students real-time information regarding the status of their application. The FA *Dashboard* was released on September 17, 2012 (one week before Fall Term 2012). This on-demand and real-time location improved access to:

- FA fillable forms
- Notifications regarding aggregate financial aid processing
- Additional FA requirements
- Notification when their FA application is completed
- Notification when their FA award is ready to sign
- Instructions for entrance counseling and a master promissory note for loans
- Information about Satisfactory Academic Progress

Formerly students had a difficult time tracking their financial aid status and requests for additional information from the college. Drawing inspiration from the Dominoes Pizza Tracker, the Financial Aid Office and TSS designed a real-time graphical interface to give students specific, timely information about their financial aid application. Phase 1 documentation of the project can be found at https://spaces.pcc.edu/display/portaldoc/Financial+Aid+Dashboard+Phase+1

The *Dashboard* has become an integral part of the Financial Aid Office's outward-facing student communication strategy. It is supported with consistent iconography that is mirrored on the external website. The Financial Aid *Dashboard* has been a huge success and has helped to lower the amount of time it takes a student to submit the requisite paperwork. Students can access their *Dashboard* via the Paying for College tab on their MyPCC account.

Linking Statements

Mission and Values
*Helps students understand the steps of financial aid through **open and honest communication.***

Panther Path
*Helping students understand the financial aid process will help new students **prepare** for college, and limit the amount of time returning students need to spend on the process, helping them to **engage** in their studies.*

Strategic Plan
*The Financial Aid Dashboard is a product of **innovation** designed to give students **opportunity to access and complete higher education.***

PCC Requirements
PCC has received your FAFSA but additional documents are required. Review all requirements below that are red flagged and submit the needed information to the financial aid office.

You need to fulfill all requirements by the priority deadlines in order for us to complete your award by the start of each term.

🚩 Food Stamps Documentation

🚩 IRS 2011 Tax Return Transcript

🚩 Student Household Inquiry

✔ Financial Aid Application (FAFSA)

External Website

The external financial aid portion of www.pcc.edu was a virtual labyrinth of links, policy pages, forms and requirement information. In total the financial aid website was well over 1,200 individual pages. Many of the pages were outdated or contained conflicting information. Here is what some of our students said about the site:

"Don't even bother trying to find things online."
"This just makes me more confused."
"I'd rather just call or go wait in line."

In a 2012 usability study nearly every student had difficulty finding specific information on the financial website. Within a few minutes they gave up the search and opted to call the department for more information.

In 2011-12 TSS and Title III hired a web support specialist to clear out the clutter and improve the usability of the site. Through an extensive review of the site, the number of financial aid pages was cut by over 80% from 1,255 to 169 pages. Pages were organized based on steps in the financial aid process and targeted at first time financial aid students. The pages were constructed with icons and images that mirrored the Financial Aid Dashboard and provided support for this new financial aid tool. Extraneous requirements and overly formal instructions were replaced with simple steps and student friendly language.

Linking Statements

Mission and Values
*The rewrite of the Financial Aid website was a **collaborative** effort between TSS, Financial Aid and Title III to improve our **open and honest communication** with students.*

Panther Path
*The external website is focused on getting new students financially **prepared** to start class on the first day.*

Strategic Plan
*The external website redesign **drives student success** by providing students access to an **outstanding affordable education** .*
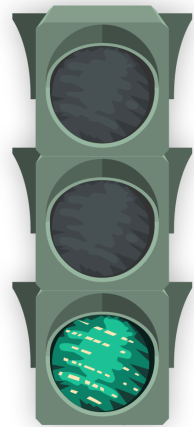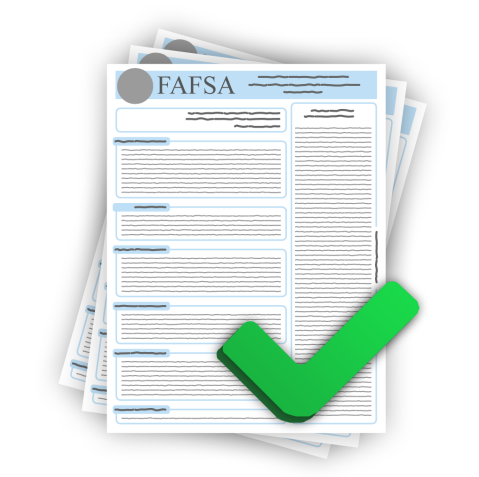
Axiom Forms

As part of 'Project Paperless' the Financial Aid Office implemented web-enabled forms to improve the collection, routing and processing of student-submitted documentation. The Title III Grant identified Axiom as the product that could interface with Banner and serve our students' needs. Axiom partners with Ellucian Banner, and their Axiom Software provides a suite of fully customizable data entry solutions for institutions. PCC uses Axiom Software to create on-line fillable forms for financial aid students; these forms provide customized automated data entry in Banner financial aid tracking modules and automated financial aid document imaging. All forms that did not require a parent or third party to submit information were converted to Axiom Forms. These online forms helped to support our redesigned document intake and processing scheme.

Improved Staffing at the Outer Campuses

Staffing at the satellite campuses had always been very thin, often with only one financial aid professional operating an office. If a person was sick or had other campus commitments, the financial aid area would have to be closed or another financial aid professional assigned to the site. This created ongoing fragility in our customer service and processing model.

As a response, and with the addition of space created through Bond activity, the Financial Aid Office reallocated its staff to improve service at the outer campuses. In 2012, we began adjusting staffing assignments so that each campus had a technician to handle document intake and customer service, an advisor to exercise professional judgment and process student requests, and a coordinator to resolve complicated files and provide immediate supervision.

Linking Statements

Mission and Values
*Giving students the opportunity to submit their documentation supports **open and honest communication** and improves **student access** to financial aid funds.*

Panther Path
*Improving the way students submit documentation takes the burden off students and allows them more time to be **prepared for, engaged with and committed** to their education.*

Strategic Plan:
*Improving our workflow gives students more time to focus on their own **student success** by providing them with money they need to attend. Axiom fillable forms support **environmental sustainability.***

Linking Statements

Mission and Values
*Improved staffing at Rock Creek, Cascade and Southeast provides students with resources that help them **access our affordable education**.*

Panther Path
*Additional staffing at the outer campuses helps students **prepare** and **commit** to their education by increasing access to staff, saving students time and allowing them to focus on their studies.*

Strategic Plan
*Having more in-person staff time gives students **guidance while they access** the Federal Financial Aid program.*

2012-13: Year Three

Making Contact

The Financial Aid Communication Team (FACT)

With the website improved and the Financial Aid *Dashboard* in place, the Financial Aid Office turned its attention toward the communication flowing out of the Financial Aid Department. It was determined that much of the messaging was confusing or contradictory. One long-time financial aid professional remarked, "We have to spend the first part of every conversation determining which email the student received that caused them to call. Then, we can begin to help them."

The college hired a 0.5 FTE Innovation Coordinator to help rewrite and refocus the messaging coming out of the department. The Financial Aid Communication Team (FACT) was formed and began a systematic review of all communication materials coming out of the Financial Aid Office.

Banner Emails
The FACT began rewriting all the messages sent to student accounts during the 2010-2011 aid year, which consisted of over 100 separate messages and over 100,000 messages sent to students. The team began with the most frequently used messages. Over the course of several weeks, the FACT developed a writing and style guide, recommended reading level, and stylistic formatting.

Forms
While many forms were converted to Axiom Forms, many others still required a parent or advisor signature. This meant that the department had to keep and maintain many of its forms as PDFs. These forms were inconsistent and often did not provide context for the information needed or instructions on how to submit the them. Forms were usually borrowed from other institutions or copied from the Department of Education. Financial Aid Office forms were rewritten with consistent formatting, language and submission instructions to help the student, parent or advisor submit the correct information. As part of the rewrite all forms were made ADA compliant with correct reading and tab order.

Ask the Panther
PCC's self-service knowledge-base had not been updated since the previous Title III Grant ended. The content was outdated and new information on current policies was not included. The FACT developed writing and formatting guidelines to improve our messaging.

Support Materials
Over the years, each financial aid location had created its own informational handouts to students. These handouts varied greatly in content and quality. In some limited cases, they even contradicted each other. All support materials were rewritten and standardized for consistent messaging across the district.

Linking Statements

Mission and Values
*Improved communication through the FACT process was a **cooperative** process to bring **open and honest communication** to students.*

Panther Path
*Financial aid communication impacts students at every stage of the Panther Path: **prepare, engage, commit, complete, and thrive.***

Strategic Plan
*The FACT process is the product of a **culture of innovation** that supports our **sustainable** paperless initiative.*

Managing Your Financial Aid

In 2011, Title III developed a Financial Learning Center proof-of-concept site that provides information on how to manage student loans and get the most out of a student's financial aid. This pilot formed the foundation for a self-service financial aid module in the pre-existing Panther Tracks cluster.

The *Managing Your Financial Aid* site was designed with input from professionals from multiple departments across the district. As a companion piece to the financial aid website, it was designed to give students information that extends beyond the application and awarding process.

Managing Your Financial Aid has been an integral part of the Mandatory Financial Literacy program (see below) as the primary content for in-person counseling.

Students' Guide to Money

The *Students Guide to Money* is the product of collaboration between TSS and Financial Aid, with advice and input from academic professionals. The self-service education module is designed to help students budget and 'live like a student.'

The module is an extension of the personal finance portion of the Financial Learning Center proof-of-concept. It covers basic financial literacy concepts like budgeting and savings, and serves as the primary content for the online course required in Mandatory Financial Literacy. In 2014, the governance of this module was turned over to the Student Accounts Office to help them develop their Financial Success Coach program.

Linking Statements

Mission and Values
*A district-wide **team collaborated** on creating an **effective teaching** tool to help students understand the basics of managing their financial aid.*

Panther Path
*The module supports financial aid students at the **engage, commit,** and **thrive** phases of the Panther Path.*

Strategic Plan
*Helping students understand how to manage their financial aid and debt **drives student success** both in and out of college.*

Linking Statements

Mission and Values
*The Student's Guide to Money was developed in **collaboration** with TSS to provide students with **basic skill education** in financial literacy.*

Panther Path
*Giving students information to help them manage their finances while in school and beyond, helps students **thrive**.*

Strategic Plan
*Understanding how to manage their money will help students not over-borrow, keeping **outstanding education affordable.***

Financial Aid Television

PCC contracted with FATV to provide video and document support. Their video assets are fully integrated into the financial aid website and are 100% ADA compliant. In the first year, 10,000 students viewed one or more FATV videos. Additionally, FATV hosted several PCC specific videos that support the five-step framework of both the *Financial Aid Dashboard* and the new and improved Financial Aid Website.

The content provided by this servicer supports every step of the financial aid process, including:
- Application
- Eligibility and program limits
- Financial Literacy
- Entrance and Exit Counseling

Delinquency Management

PCC contracted with Inceptia to help get delinquent student loan recipients back on track and repaying their loans. Inceptia won the bid by demonstrating superior customer service, a 'warm hand-off,' and an effective resolution strategy. They were tasked with doing outreach to students more than 72 days delinquent.

Since partnering with PCC, Inceptia has performed delinquency outreach to over 30,000 PCC financial aid students. This outreach campaign consists of over 500,000 phone calls and emails to students, and their efforts have stabilized PCC's cohort default rate (CDR). As a result, Portland Community College's CDR has fluctuated less than four percent over the last four years, while other community colleges in the state have seen volatile scores that jump as much as eleven points in a single year.

Linking Statements

Mission and Values
*FATV helps the department create an **effective and supportive** financial aid experience for new and returning students.*

Panther Path
*Content provided and hosted by FATV helps students be **prepared** for college and stay **engaged and committed** with vital information on Satisfactory Academic Progress and Timeframe Extension information.*

Strategic Plan
*FATV demonstrates how **innovative partnerships** can build out programs that **drive student success.***

Linking Statements

Mission and Values
*The delinquency management program helps **prepare students for success** in repaying their student loans.*

Panther Path
*The program helps students get back on track and **thrive.***

Strategic Plan
*The delinquency outreach program **drives student success** in repaying their student loan by helping them **achieve sustainable** repayment of their loans.*

Defaulter Characteristic Analysis

Inceptia, PCC's delinquency management service provider, also provided PCC with a large-scale data analysis on likely defaulters. This analysis identified our most 'at risk students' as those who did not complete their degree or certificate. They tended to be 100% Pell eligible, first-generation students with low GPAs who had completed less than 30 credits. This work was foundational in analyzing our student population and looking for opportunities to improve our default rate.

This work has been extremely important in helping the college understand where our students are struggling, and how we can provide support to help keep them out of default.

Mandatory Financial Literacy (MFL)

As outlined in the Title III Grant, financial aid was required to implement a financial literacy intervention for students who are deemed, 'at risk.' At-risk students are those who meet one or more of the following criteria:
- Two consecutive terms of zero credits completed
- An overall completion rate of less than 50%
- A cumulative GPA of less than 1.5

Students who met any of the above criteria were flagged for MFL and given one term to complete an online course in personal finance, the *Students Guide to Money* (see above).

Students who did not complete the *Students Guide to Money* with at least a 70% were required to complete a follow up, in-person session with a financial aid coordinator. During this session, the student was required to perform the following:
- Review their GRAD Plan and see how many credits they had left
- Review their NSLDS loan and grant totals
- Review *Managing Your Financial Aid*

During the first two years of this program, just over 900 students successfully completed the online course work, while about 100 completed in-person counseling.

Linking Statements

Mission and Values
*Understanding the characteristics of defaulting students helps the college **effectively and ethically** use public funds, while providing additional **supportive student services.***

Panther Path
*Understanding defaulter characteristics helps the college identify students in the **engage, commit and complete** phases to help them **thrive** later.*

Strategic Plan
*Understanding the early indicators of default helps PCC **drive student success** in their student loan repayment.*

Linking Statements

Mission and Values
*MFL helps to protect the **ethical use of public funds** through **basic skill education.***

Panther Path
*MFL helps struggling students understand how to **commit** to a budget and **thrive** because their student loan payments are lower.*

Strategic Plan
*MFL helps **drive student success** by mandating they demonstrate they understand the basics of financial literacy.*

Work Study Restructure

In October of 2012 the Financial Aid Office initiated another LEAN event to improve the delivery and administration of the Federal Work-Study (FWS) Program. Prior to this a student had to engage in a circuitous process likened to a scavenger hunt in the pursuit of orientation, job openings, and supervisor approvals.

The initial goals for this process can be found in Appendix O-1. The FWS site improved communication by providing a more intuitive path for FWS-eligible students to follow. Entering into a collaboration with Career Services, students are now able to go to one source to gain student employment information. Appendix O-2 shows the original process students endured and Appendix O-3 presents the improved process for students. Appendix O-4 outlines the detailed description of the restructured FWS process including a chart of steps. Another outcome of this improvement was a detailed FWS manual provided to college employees who supervise FWS students. This manual can be found in Appendix O-5.

Lastly, the FWS Coordinator began tracking FWS employment usage in order to provide data to maximize utilization of our funding for this program. The employment trends are listed in Appendix O-6 for 2012-13 and 2013-14.

Linking Statements

Mission and Values
*Restructuring the Work Study Program provides students important **work force** opportunities that **promote economic development** through a **supportive student service.***

Panther Path
*Helping students find quality, higher paying jobs helps them be **prepared** for the start of the school year and **engage** with college staff and faculty.*

Strategic Plan
*Improved access to Work Study helps to keep PCC's **outstanding education affordable** and **drive student success.***

For more information see: Appendix O: Work Study Restructure   19
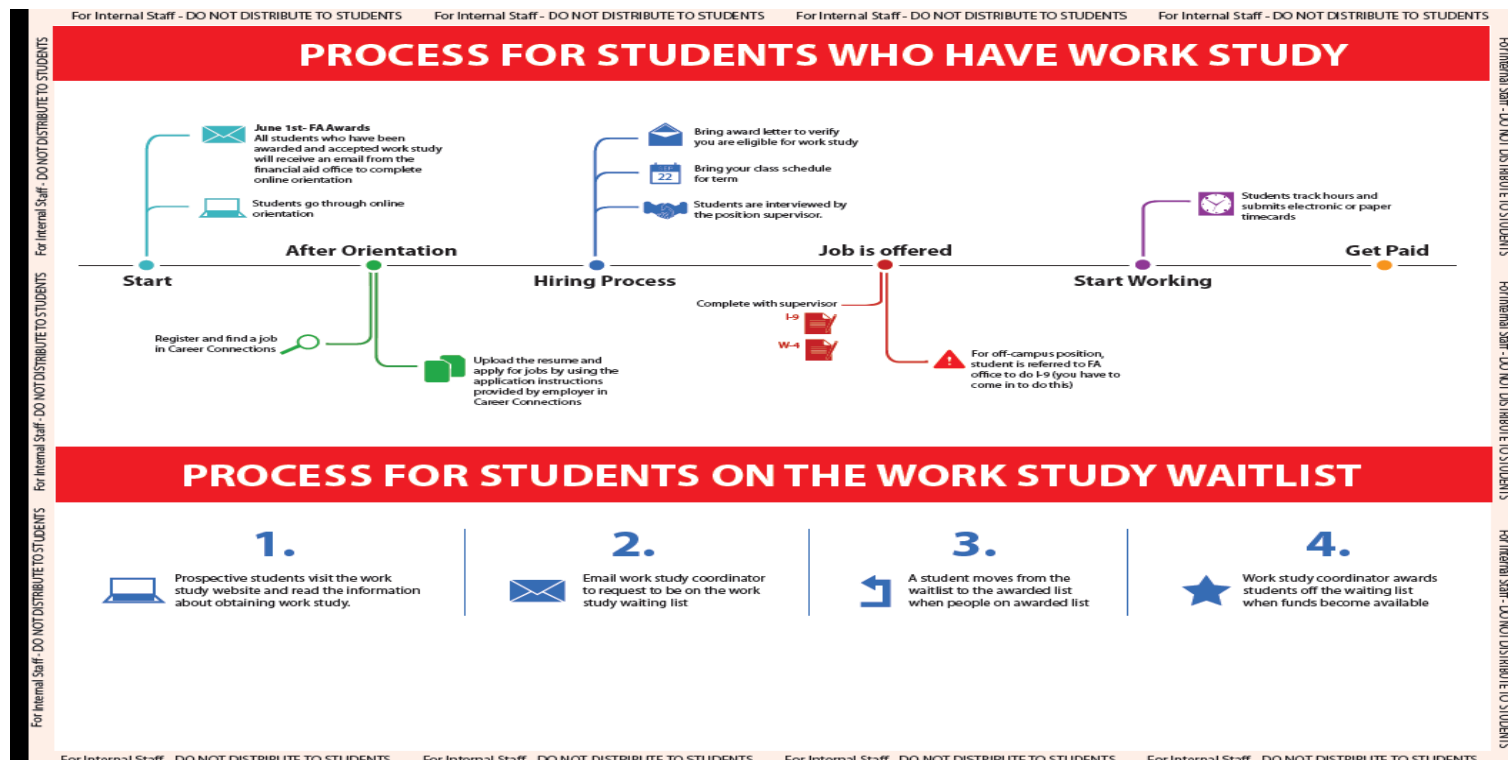
Intentional Phone Staffing

Prior to Fall 2012, financial aid staff were assigned to the phones two or three at a time, regardless of the demand for customer service. Due to high customer service demand first thing in the morning, the phone queue quickly stacked-up with students who would wait up to an hour to speak with a professional. This often lead to frustrated students and burned out staff.

Using phone data, the Financial Aid Department created a predictive phones staffing model that looked at the historical student demand every day of the academic year. This staffing algorithm predicts student demand down to the hour and the day, with adjustments for changes in enrollment, holidays and high traffic times. Below is a chart that shows average daily wait times, and the effect of algorithmic staff on these times.

Implementation

Wait Times

2013-14: Year Four

Improving Operations

Policies and Procedures

The Financial Aid department had long desired a clear, centrally organized set of policies and procedures. Working from a template provided by the National Association of Student Financial Aid Administrators, the FACT took up documenting the department's policies and procedures. Over the course of the next 18 months, the FACT researched, wrote and reviewed almost 1,600 pages of policies and Banner procedures.

As a living document, the information is centrally located in Spaces and has been organized with three information structures: an index of topics, a glossary of key topics and requirements, and a handy search engine feature for finding info quickly.

The Space also acts as our knowledge-base providing access to the language of Banner letters, forms, Ask the Panther questions, and external web pages. The intentional linking of policies with communication channels helps to manage any changes coming from Department of Education.
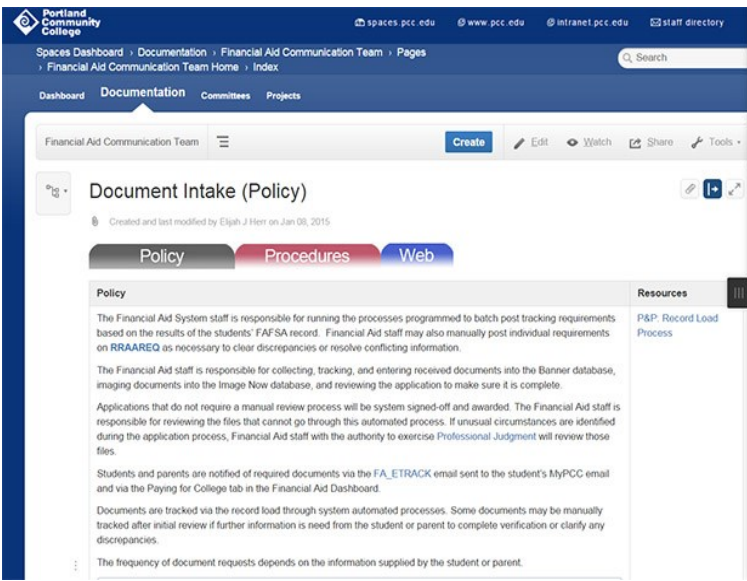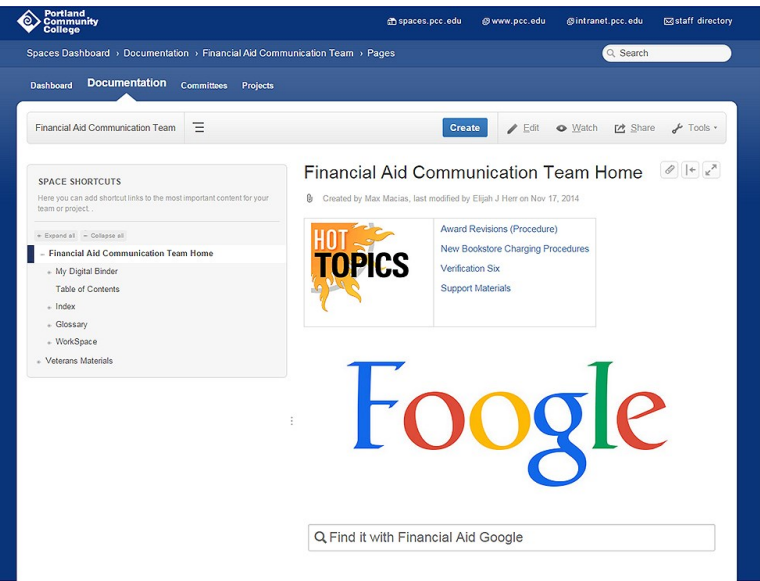
Linking Statements

Mission and Values
*Explicit policies and procedures help support **effective teaching** of our staff and work studies through **open and honest communication**, **team work** and **cooperation**.*

Panther Path
*Having a complete policy and procedure living document helps staff **prepare** students to **engage** in their studies.*

Strategic Plan
*Common procedures and standards help **drive student success**, were built with a **culture of innovation**, and **achieve sustainable excellence** by limiting paper policy memos and processing instructions.*
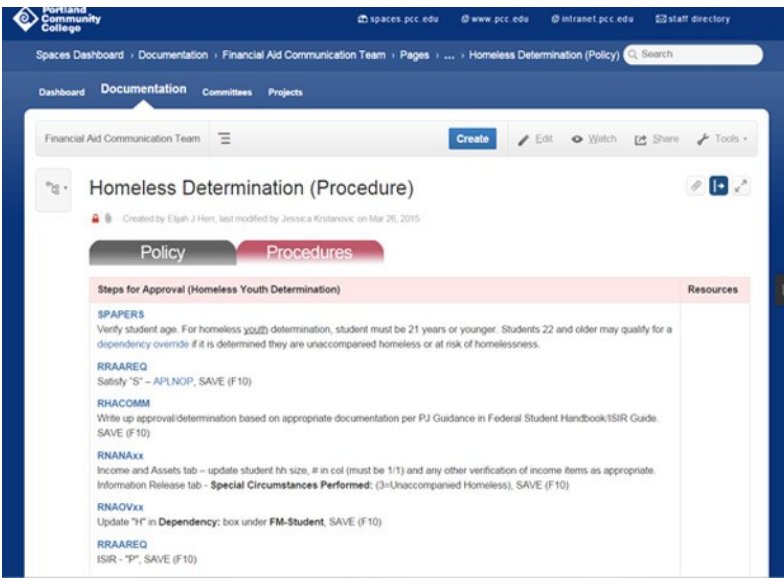
FACT Process Goes Viral!

The FACT process successfully lowered phone calls into the department by an estimated 30%. Building on this success, the Student Account Services Office formed the SACT and continued to develop PCC's Student Services Writing and Style Guide.

Since moving into Student Accounts, FACT-like teams have been implemented in Distance Education, Enrollment Services, Registration and The Office of International Education.

Linking Statements

Mission and Values
Open and honest communication between departments helps foster a culture of teamwork and cooperation.

Panther Path
Effective, student-focused communication impacts students at every stage of the Panther Path.

Strategic Plan
Effective communication drives student success through a culture of innovation.

Mandatory Financial Literacy 2.0

We met for a year with students who had failed the online financial literacy course for follow-up Mandatory Financial Literacy sessions. These in-person sessions focused less on personal finance and more on financial aid and student loan management. This is what some students said about the in-person version:

> *"This is so much better than the online version."*
> *"I am almost glad I failed the online. I am really glad I had to come in to see you."*
> *"This should be required for all financial aid students."*

The feedback from students was clear: in-person was much better. We aligned mandatory financial literacy with nationally recognized best-practices and moved to in-person financial literacy only.

Linking Statements

Mission and Values
Helps to protect the ethical use of public funds through basic skill education based on best practices of effective teaching.

Panther Path
MFL helps financial aid students understand how to manage their loans and thrive.

Strategic Plan
MFL helps to drive student success by helping students achieve a sustainable student loan management plan.

The Grace Program

The next step in PCC's ongoing Cohort Default Strategy was to create a program to provide loan management information to students who were in the second half of their six-month Grace Period. These students often didn't know they were in their Grace Period or how to find their loan servicer, and in some cases didn't even know how much they'd borrowed.

The program was developed over a four-month period as a partnership between Financial Aid and Student Accounts. Four Student Account Specialists have been tasked with calling the thousands of students who enter into grace every term.

Electronic Documentation

In order to lower barriers to submit documentation, we gave students new options to submit documentation. Student can now submit PDFs, SAP supporting documentation and other scanned documents electronically via documents@pcc.edu.

Additionally, we updated all of our ADA compliant forms with E-Sign compliant digital signatures. In combination with email document collection, all of our forms became 100% ADA compliant.

Working with TSS's phone team, we were able to convert our FAX machine into a virtual FAX that routed documents into our email box. This streamlined the document collection process and greatly reduced the amount of paper and toner the office was using.

Linking Statements

Mission and Values
*The Grace Program is designed to honor the **worth of each individual** financial aid student through a **supportive student service**, which helps to ensure an **effective and ethical use of public funds**.*

Panther Path
*Giving specific and timely loan management information to **completing** financial aid students will help them **thrive**.*

Strategic Plan
*The Grace Program is the product of a **culture of innovation** between the Student Accounts Office and Financial Aid, built to **drive student success**.*

Linking Statements

Mission and Values:
*Giving students more options to submit their documentation, helps the Financial Aid Office, build a **supportive student service** in a **rapidly changing world**.*

Panther Path
*Making it easier for students to submit documentation helps them be **prepared** for the first day of school and simplifies the steps they need to **complete** and to **thrive**.*

Strategic Plan
*Electronic documentation and collection demonstrates a **culture of innovation** which supports the **equity and inclusion** of all students and promotes **sustainability**.*

Automated Processing

The department purchased and implemented Automic, a scheduling software program that allows the Financial Aid Systems Team to schedule overnight processing. This program improvement eliminated the need to manually run serial processes, freeing up Systems staff to focus on other priorities. Manual processes that have been converted to automated overnight functions include:

- New Year Kick Off Record Load
- 1415 File Import (record load files only)
- 1415 Record load (complete record load)
- 1415 Suspense (manual review then run)
- 1415 Correction Load
- 1415 Packaging
- Summer Revisions
- Suspense

Annual Review of Communication Materials

The FACT performed its first annual review of communication materials. This review completed the first iteration of the development cycle and demonstrated that the process is operational and sustainable. Review process includes a full review based on policy changes and guidance from the Department of Education

- Letters
- Website
- Forms
- Support Materials
- Ask the Panther Questions
- Financial Aid TV

Linking Statements

Mission and Values
*Automating the record load allows staff to foster **teamwork and cooperation** that can be used to find **creative solutions** to Financial Aid's challenges.*

Panther Path
*Automated record load gives staff more time to **engage** with students and help them **prepare** to **thrive.***

Strategic Plan
*Automating our record loan represents a significant **innovation** that gives staff more opportunity to **drive student success**.*

Linking Statements

Mission and Values
*Annually reviewing our materials demonstrates a commitment to **open and honest communication.***

Panther Path
*Making sure our financial aid materials are current helps to improve student performance at **every stage of the Panther Path.***

Strategic Plan
*The completion of the communication review process demonstrates the department's ability to **achieve sustainability** in our **culture of innovation.***

The Federal Program Review

In July, 2014 Portland Community College was selected for a Federal Program Review by the Department of Education. The last time PCC had been selected for a review was 1987. Program reviews are assigned randomly. Over the Fourth of July weekend the Financial Aid Office prepared all the requested documents for the Department. Some of the items requested were:

- A list of all course texts used in the last two years

- A data file containing dozens of data points for all students in the last three years

- A ten page list of policy and procedure entries

- Dozens of customer service disclosures

- All consortium agreements for the last two years

The month long audit process ended in a week long visit from the federal auditors. The auditors reviewed the last three years of data and conducted interviews with key financial aid, student account and finance staff.

While the auditors found two areas where the college was out of compliance, both were corrected within 30 days and the college passed the program review. In the process, the auditors made mention of several key improvements in financial aid, including our Policies and Procedures, Cohort Default Strategy, and careful handling of SAP.

Linking Statements

Mission and Values
*As part of the program review, the Financial Aid Office was required to demonstrate how it supported published college policies and procedures, like the **Mission and Values** Statement*

Panther Path
*The program review demonstrated that PCC was **prepared** to serve students and remains **committed** to their success*
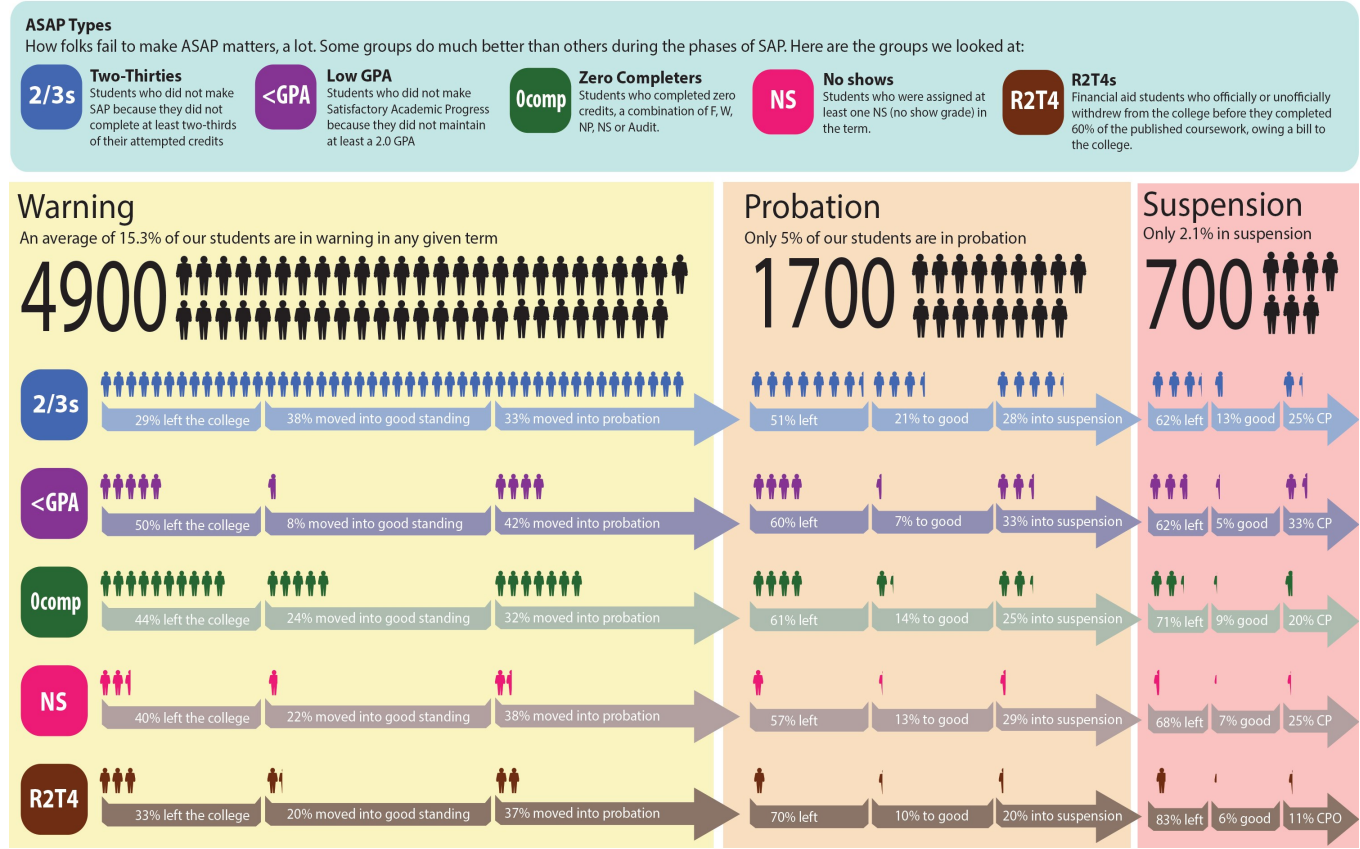
Strategic Plan
*By **igniting a culture of innovation** the Financial Aid Office was able to **achieve sustainable excellence in all operations** and drive student success*

Early Warning SAP Analysis

The Department of Education's recommendation on CDR management is to create a series of early warning and intervention systems for students who are likely to default. According to the data compiled by Inceptia, PCC's SAP process would be a good candidate for an early warning system.

Particular populations of financial aid students do not do as well as others. For example, students who have a cumulative GPA of less than 2.0 tend to have very low success rates. As of this writing, the early warning analysis has expanded beyond financial aid and now includes non-financial aid students. The data will be reviewed with several leadership committees within the college to inform policy/operational changes.

ASAP Types
How folks fail to make ASAP matters, a lot. Some groups do much better than others during the phases of SAP. Here are the groups we looked at:

2/3s Two-Thirties Students who did not make SAP because they did not complete at least two-thirds of their attempted credits

<GPA Low GPA Students who did not make Satisfactory Academic Progress because they did not maintain at least a 2.0 GPA

0comp Zero Completers Students who completed zero credits, a combination of F, W, NP, NS or Audit.

NS No shows Students who were assigned at least one NS (no show grade) in the term.

R2T4 R2T4s Financial aid students who officially or unofficially withdrew from the college before they completed 60% of the published coursework, owing a bill to the college.

Warning
An average of 15.3% of our students are in warning in any given term

4900

2/3s	29% left the college	38% moved into good standing	33% moved into probation
<GPA	50% left the college	8% moved into good standing	42% moved into probation
0comp	44% left the college	24% moved into good standing	32% moved into probation
NS	40% left the college	22% moved into good standing	38% moved into probation
R2T4	33% left the college	20% moved into good standing	37% moved into probation

Probation
Only 5% of our students are in probation

1700

2/3s	51% left	21% to good	28% into suspension
<GPA	60% left	7% to good	33% into suspension
0comp	61% left	14% to good	25% into suspension
NS	57% left	13% to good	29% into suspension
R2T4	70% left	10% to good	20% into suspension

Suspension
Only 2.1% in suspension

700

2/3s	62% left	13% good	25% CP
<GPA	62% left	5% good	33% CP
0comp	71% left	9% good	20% CP
NS	68% left	7% good	25% CP
R2T4	83% left	6% good	11% CPO

2014-15: Year Five

Stabilizing Innovation

Policies and Procedures Maintenance

In Winter 2014 we took a 'snapshot in time' of our policies and procedures. The downloaded document totaled over 1,200 pages and contained information on all key financial aid operations. Once the policies and procedures were archived, the FACT updated it with new information, requirements and forms for the 2014-15 financial aid year. The archiving and updating of policies and procedures marks the end of the first development cycle and demonstrates that the initiative is both operational and sustainable.

Digital Binders

With the policies and procedures documentation complete, we turned our attention to improving the organization and structure of the knowledge-base. We developed individual Spaces pages that staff could edit themselves. The so-called Digital Binder allows staff to collect and edit links to policy pages and information resources. To date, staff use their Digital Binders to collect 'Dear Colleague" letters, NASFAA correspondence, and federal regulations, as well as our own policy pages.

The digital binders also contain key training information from TSS and an announcement channel for the Director of Financial Aid. This channel is a quick way for the Financial Aid Office to post meeting notes and agenda items.

Linking Statements

Mission and Values
*Annually reviewing our training and documentation demonstrates a commitment to **open and honest communication** that supports **teamwork and cooperation.***

Panther Path
*Making sure our financial aid policies and procedures are current helps to ensure staff are **prepared** to improve student performance at **every stage of the Panther Path.***

Strategic Plan
*The completion of the policy and procedure review process, demonstrates the department's ability to **achieve sustainability** in a **culture of innovation.***

Linking Statements

Mission and Values
*Staff ability to collect and manage their own Spaces site strengthens our commitment to **open and honest communication.***

Panther Path
*Having access to timely and customized information helps financial aid staff be **prepared** to support students through every stage of the **Panther Path.***

Strategic Plan
*Digital Binders are yet another component of our **culture of innovation** that is focused on **driving student success.***

Process and Workflow Review

We have begun a review of how we handle documents, verification and work flow for our nine Financial Aid Technician II positions. The goal is to improve our current process by reviewing policies and procedures for document intake. Technicians will be assigned individual processing and customer service goals over the next year.

This ongoing review and improvement process has already improved our document intake. The vast majority of our documents are now imaged and linked within one business day of receipt.

Dashboard 2.0

In Winter, 2014 we took a 'snapshot in time' of our policies and procedures. The downloaded document totaled over 1,200 pages and contained information on all key financial aid operations. Once the policies and procedures were archived, the FACT updated it with new information, requirements and forms for the 2014-15 financial aid year. The archiving and updating of policies and procedures marks the end of the first development cycle and demonstrates that the initiative is both operational and sustainable.

Linking Statements

Mission and Values
*As part of our ongoing, continuous improvement model, the Financial Aid Office will continue to be **a supportive student service** that emphasizes **teamwork and cooperation.***

Panther Path
*Ongoing, critical review of our internal processes will ensure that the Financial Aid Office is always **prepared** to help students **commit** to their studies and **thrive.***

Strategic Plan
*Continuous, rigorous review helps the Financial Aid Office **achieve sustainable excellence** in all operations**.***

Linking Statements

Mission and Values
*Continuous improvement in the Dashboard demonstrates our commitment to **open and honest communication** that is the hallmark of a **supportive student service.***

Panther Path
*Giving students and staff more information about their financial aid helps everyone be more **prepared** to **commit** to their education and **thrive.***

Strategic Plan
*Our ongoing **culture of innovation** has **achieved sustainable excellence.***

Managing Your Financial Aid 2.0

The previous version of *Managing Your Financial Aid* presented a lot of valuable information to students, but it was not organized around the students' experience with financial aid. In reviewing the current set of modules, the FACT identified four stages of financial aid:

- Assistance filing the FAFSA: a companion piece to the financial aid website
- I have my financial aid, now what?!
- I've completed the first year: check your pace and plan
- Managing your student loans

At each stage the information a student needs to be successful changes significantly. Moreover, it is too much information to give to students all at once. These modules will form the basis for student presentations by financial aid staff and help us provide consistent information to students.

Sharing our Innovations

In Winter, 2014 we took a 'snapshot in time' of our policies and procedures. The downloaded document totaled over 1,200 pages and contained information on all key financial aid operations. Once the policies and procedures were archived, the FACT updated it with new information, requirements and forms for the 2014-15 financial aid year. The archiving and updating of policies and procedures marks the end of the first development cycle and demonstrates that the initiative is both operational and sustainable.

Linking Statements

Mission and Values
*The rewrite of Managing Your Financial Aid is another example of the Financial Aid Office's commitment to **effective teaching** and **open and honest communication.***

Panther Path
*The rewrite of the Managing Your Financial Aid is designed to support students at the **first four phases of the Panther Path.***

Strategic Plan
*The Managing Your Financial Aid redesign is **sustainable operation** focused on **driving student success.***

Linking Statements

Mission and Values
*Sharing our innovations at both the state and national level helps other colleges prepare for a **rapidly changing world** with **open and honest communication.***

Panther Path
*Sharing our accomplishments with other colleges helps them **prepare** to be **committed** to student success.*

Strategic Plan
*Presenting our work to others demonstrates PCCs commitment to a **culture of innovation** that helps to **transform our educational community.***
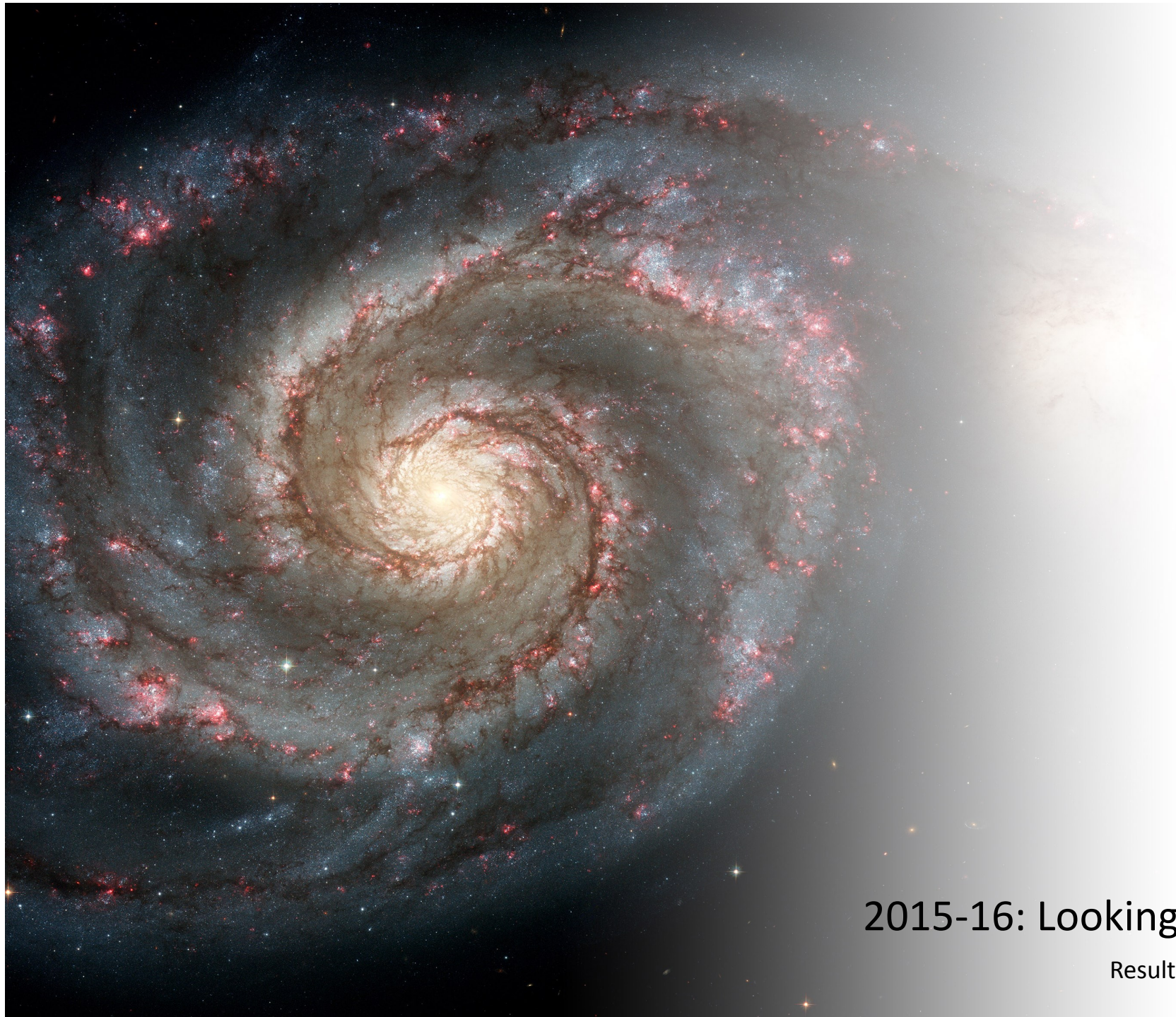
2015-16: Looking Back/Looking Forward

Results and Next Steps

The Results

Over the last five years, the Financial Aid Office has initiated significant, systemic change. Some of these changes have targeted specific operational areas, like document handling and student communication, while others have impacted global operations like our customer service model. These innovations were not implemented in a sequential order; rather, multiple improvements were conducted simultaneously. Because of the overlapping, integrated and often systemic nature of these initiatives, it is difficult to attribute individual success metrics to a specific project or improvement. As such, we present the results of our efforts as the sum total of the last five years.

Website Usability Study

Below is a comparison of the usability of specific tasks by PCC students from 2012 to 2013. Green indicates they were able to complete the task.

FAFSA Processing Time

The average number of days it took to process at student's financial aid in 2010-11 was 78 days, by 2013-14 that number was down to 50 days.

Document Intake

Document handling in the department has dropped from two weeks to within twenty-four hours of submission.

FAFSA Load Speed

In 2010, we had loaded only 1,374 FAFSA's by March 18th, as compared to 14,673 by February 19th, 2015. That is over ten times the volume loaded a month earlier!

Cohort Default Rate

PCC's CDR remains significantly lower than the state community college average.

	2009	2010	2011	2012* projected
Portland Community College	18.5	20.3	16.5	17.3
Oregon CC Average	22.5	25.4	23.5	22.5
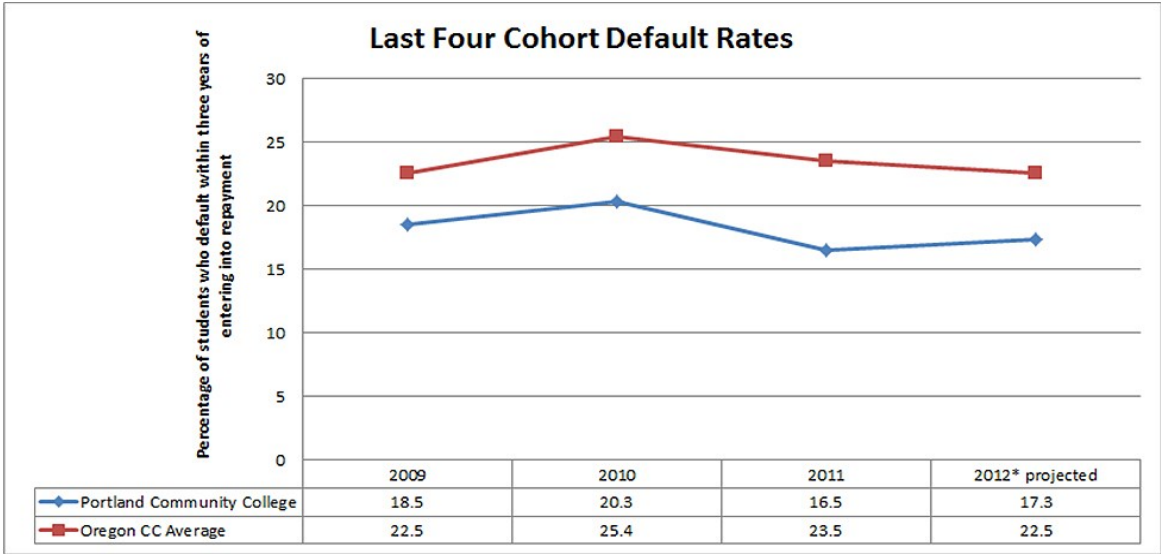
Customer Service/Phones

All customer service metrics have improved significantly over the last three years. Call volume, wait times and abandon call rates have all decreased. This is most likely due to a combination of improved transparency through the Financial Aid Dashboard and clarity of the external website, as well as improvements to our out-going messages and customer service model. Below are three charts that track volume, abandon rate and wait times from Summer 2012 to Spring 2015, with markers for the completion of major initiatives.

In summary call volume dropped 40% from Fall 2012—Fall 2014, while wait times have plummeted 75% over the same period. Likewise, the abandon call rate has dropped 65% over the last two years.
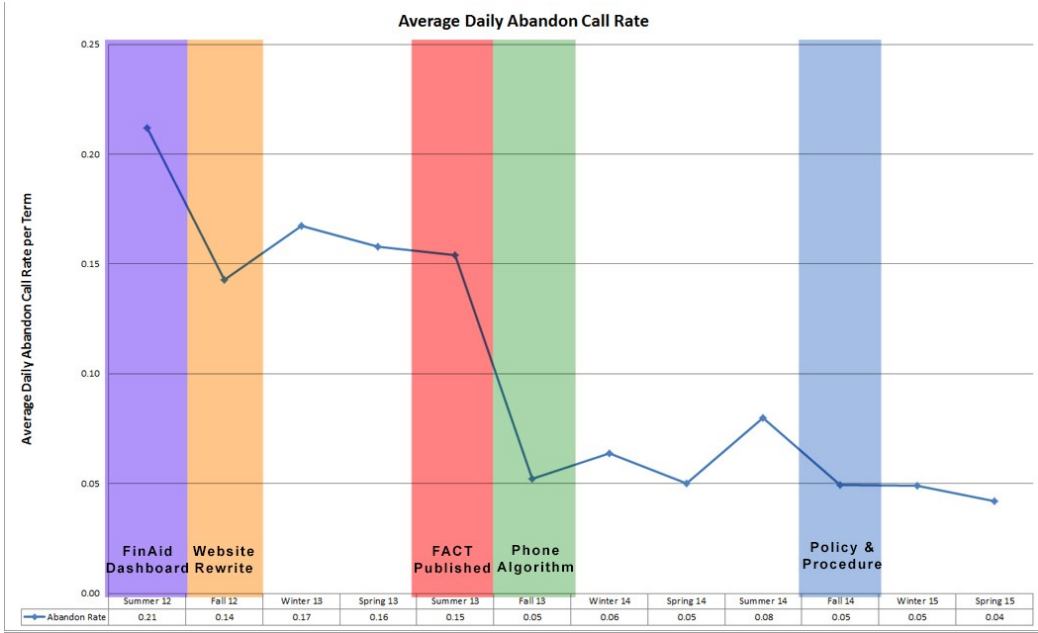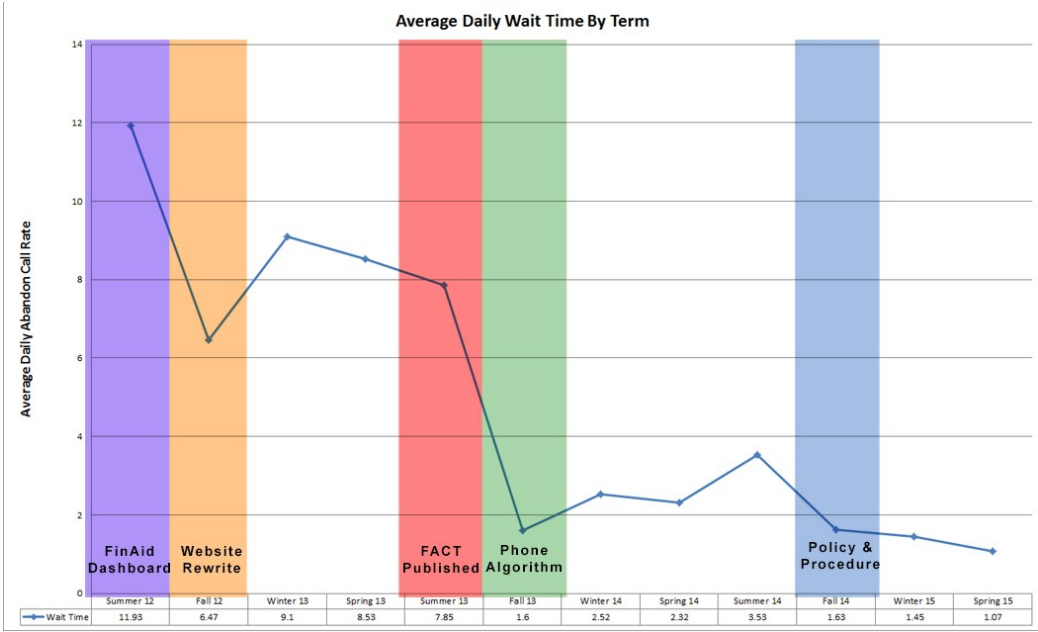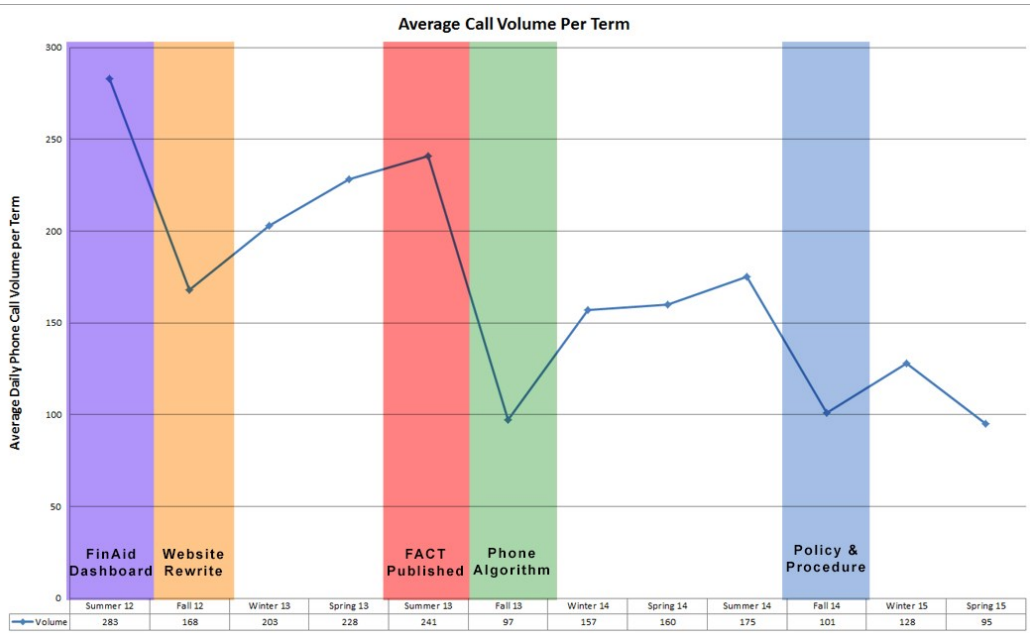

Average Daily Wait Time By Term

	Summer 12	Fall 12	Winter 13	Spring 13	Summer 13	Fall 13	Winter 14	Spring 14	Summer 14	Fall 14	Winter 15	Spring 15
Wait Time	11.93	6.47	9.1	8.53	7.85	1.6	2.52	2.32	3.53	1.63	1.45	1.07

Average Call Volume Per Term

	Summer 12	Fall 12	Winter 13	Spring 13	Summer 13	Fall 13	Winter 14	Spring 14	Summer 14	Fall 14	Winter 15	Spring 15
Volume	283	168	203	228	241	97	157	160	175	101	128	95

Average Daily Abandon Call Rate

	Summer 12	Fall 12	Winter 13	Spring 13	Summer 13	Fall 13	Winter 14	Spring 14	Summer 14	Fall 14	Winter 15	Spring 15
Abandon Rate	0.21	0.14	0.17	0.16	0.15	0.05	0.06	0.05	0.08	0.05	0.05	0.04

Student Satisfaction Survey

Overall, students are increasingly satisfied by the service they receive from the Financial Aid Office. Below are a few highlights from the customer service survey. This survey will help guide the department toward future development and outreach and Operation: FARO (see next page).

	2013			2014		
Survey Question	Agree	Neutral	Disagree	Agree	Neutral	Disagree
"When I called the Financial Aid Office, the people answering my calls were courteous."	79.5	7.6	12.8	84.9	7.1	8
"When I called the Financial Aid Office, the people answering my calls were helpful."	77.8	7.4	14.9	84.3	5.6	10
"When I called the Financial Aid Office, the people answering my calls were knowledgeable."	76.2	8.2	15.6	82	7.7	10.3
"When I called the Financial Aid Office, my questions were answered promptly."	75.5	8.4	16.3	82.6	6.9	10.5
"When I requested a call back from the Financial Aid Office, my call back request was returned."	65.5	9.7	24.8	69.3	15.6	15.1
"I found that the staff responds to my questions/problems with fairness."	77.1	9.3	13.6	84.5	7.7	7.7
"I understand the e-mail letters I receive from the Financial Aid office."	87.7	4.9	7.5	92.2	2.0	5.3
"Printed Information I receive about financial aid programs, policies and application procedures are accurate."	78.5	14.7	6.8	81	13.7	5.4
"I clearly understand the student loan process."	-	-	-	91	n/a	9
"I understand loan repayment timelines and processes."	-	-	-	82.5	n/a	17.5

Operation F.A.R.O. Financial Aid Resources and Outreach

Through five years of innovation and change, we have achieved significant improvements in both our processing and customer service models. We forecast that these improvements will free our financial aid staff members to engage with both students and other departments to provide financial aid information and resources. This 'high-touch' service model has long been a goal of the Title III efforts and we project that we will finally have the resources to complete the original vision of the grant.

Over the Summer of 2015 financial aid staff will be developing a series of priorities to help support students and the college at large. To help determine these priorities, financial aid staff will :

- Review the Student Satisfaction Surveys from both 2013 and 2014
- Create an inventory of current efforts at all campuses and centers
- Rank service areas in terms of priorities

While we are still in the planning phases of this initiative, the financial aid department is looking for robust partnerships, and the following areas have been identified as potential partners:

High School Outreach	Orientation Centers	CG Courses
Developmental Education Programs	Links, Future Connect, Middle College	ROOTS
Entrance Counseling	BIT Teams	Women's Resource Center
Multicultural Center	ASPCC	Advising

The structure of the program will be determined by the specific partnerships we form. However, we have identified several programmatic features that will be fundamental to Operation FARO:

- Centralized presentation materials and handouts
- Centralized staff scheduling at all campuses
- Annual targeted information campaigns
- Mandatory monthly report outs of all Outreach Events at all staff meetings

Linking Statements

Mission and Values
*The FARO project will be designed to promote **teamwork and cooperation** through **open and honest communication** to strengthen our **supportive student services.***

Panther Path
*The FARO project will help us strengthen our interaction and guidance model for students during the **engage, commit and complete** phases of the Panther Path.*

Strategic Plan
*Our innovative approach to sharing financial aid resources will allow us to help **drive student success** though **equal opportunity** to speak with financial aid professionals.*

Financial Aid Project Summary	The Panther Path					Strategic Plan					
	Prepare	Engage	Commit	Complete	Thrive	Affordable	Student Success	Innovation	Community	Equity & Inc.	Sustainability
The LEAN Process	X	X	X	X	X		X	X	X		
Financial Aid Workflow	X						X		X		
Financial Aid Dashboard	X	X						X	X		
External Website	X					X	X				
Axiom Forms	X		X				X			X	X
Improved Staffing at the Outer Campuses	X		X				X		X		
Financial Aid Communication Team (FACT)	X	X	X	X	X			X			X
Managing Your Financial Aid		X	X		X		X				
Student's Guide to Money					X	X					
Delinquency Management					X		X				X
Financial Aid TV	X	X	X				X	X			
Defaulter Analysis		X	X	X	X		X				
Mandatory Financial Literacy			X		X		X				
Work Study Restructure	X	X				X	X				
Intentional Phone Staffing	X	X	X			X	X				

Financial Aid Project Summary	The Panther Path					Strategic Plan					
	Prepare	Engage	Commit	Complete	Thrive	Affordable	Student Success	Innovation	Community	Equity & Inc.	Sustainability
Mandatory Financial Literacy 2.0					X	X	X				
Policies and Procedures	X	X					X	X			X
FACT process goes viral	X	X	X	X	X		X	X			
The Grace Program				X	X		X	X			
Electronic Document Collection	X				X			X		X	
Intentional Phone Staffing	X	X	X				X		X		
Automated Processing	X	X			X		X	X			
Annual Review of Communication Materials	X	X	X	X	X			X			X
Early Warning SAP Analysis		X	X		X		X	X			
Policy and Procedure Maintenance	X	X	X	X	X			X			X
Digital Binders	X	X	X				X	X			
Process & Workflow Review	X		X		X						X
Dashboard 2.0	X		X		X			X			X
Managing Your Financial Aid 2.0	X	X	X	X			X				X
Sharing our Innovations	X		X					X	X		
Operation: FARO		X	X	X							

Veteran Education Benefits Office

Five Year Program Review

June, 2015

Introduction

Portland Community College is a multi-campus institution that serves over 85,000 students. Of those, approximately 2000 students annually are utilizing VA Education Benefits to pursue a degree at the college. Staff in the office assist and support students through the often complicated and multi-layered veterans education benefit process.

In 2009, a program review was initiated and noted that the fluctuation in service level and the centralized office structure resulted in a less than optimum level of service for the college's large veteran population. Several recommendations were made in that report as ways to improve services offered to PCC students.

This program review will focus on the enhancements that Portland Community College has implemented since the last review of Veteran Services in 2009. These enhancements are primarily: an increase in staffing, increased technology solutions to help students self-serve and staff to automate, improved communication/collaboration of district veteran services, intentional outreach to deliver relevant information to students when they need it and increased access for students to college services. Much of the support for initiatives of web-site re-design, reporting technology and student advising has come from the Title III FLAIR grant. We would like to acknowledge the leadership that was provided by District leadership and Rhonda Boyd, Director of the Title III grant toward providing for improved service to our student veterans.

In August of 2009 veterans first became able to utilize the Post 9/11 GI Bill. This benefit represents the most significant overhaul and improvement to Veterans Education Benefits since the creation of the Montgomery GI Bill in 1944. This improved benefit combined with significant increase in returning veterans from foreign conflicts caused veteran enrollment at colleges nationwide to rise sharply. PCC has made significant efforts to support these students as they enroll at PCC in greater numbers than at any other college or university in Oregon.

Mission, Values and Goals

PCC Veteran Services Office is committed to helping veterans and their dependents use their VA education benefits to support their college expenses. PCC recognizes the sacrifice of those who have served in the United States Armed Forces and is honored to assist students in utilizing VA Education Benefits to their best advantage. PCC is dedicated to providing students with effective access to any VA educational benefits they may be entitled to.

Organizational Structure

Veteran Services is staffed by four specialists across the district and one Financial Aid/Veteran Services Coordinator who reports to the Director of Financial Aid. This organizational structure allows District oversight by the Director of Financial Aid and Veteran Services to ensure that services are offered to all PCC students. The Veteran Specialists are posted at each of PCC's four campuses.

In addition to the District staffing of Veteran Specialists, several PCC campuses operate their own centers and resources in support of student veterans. There are also several campus-based committees which consist of stakeholders and those with a particular interest in student veterans. PCC has also been chosen to host a Vet Success On Campus employee who represents the VA positioned on the College's four campuses to connect with students and support them in many ways that may positively impact their education. This report will seek to explain the goals and services of each of these related entities.

PCC Student Veteran Population

This report focuses on students who are using VA Education Benefits at PCC. Students using VA Education Benefits include veterans and the dependents (spouse and children) of disabled or deceased veterans. Additionally it is assumed that there are other veterans attending PCC who declined to self-identify and are not using any VA Education Benefits, however the number of those veterans is not known.

PCC student veteran populations have increased and declined in a similar trend to general student populations. Below are the most recent numbers that can be tracked.

There are 6 types of VA Education Benefits that are currently being used by students at PCC. The majority of students are using the Post 9/11 GI Bill. Other students are using one of the following: original Montgomery GI Bill, Reserve or National Guard benefits, VA Vocational Rehab, benefits for the dependents of disabled or deceased veterans. For a short time in 2012 – 2014 there was an additional VA Education Benefit that impacted enrollment when it started and ended called the Veterans Retraining and Assistance Program of 2012-2014 (VRAP).

The sharp increase around the Fall of 2009 coincides with the implementation of the robust Post 9/11 GI Bill in August of 2009.

The peak and fall of the veteran population at PCC between Fall of 2012 and Spring 2014 coincides with the creation and termination of a new VA Benefit called VRAP which allowed a population that previously had no access to VA benefits to have funds to use for a period of 12 months. At the highest level of enrollment PCC had as many as 178 VRAP students attending. As of March 31, 2014 that program has ended.

Veteran Population as of Spring 2015

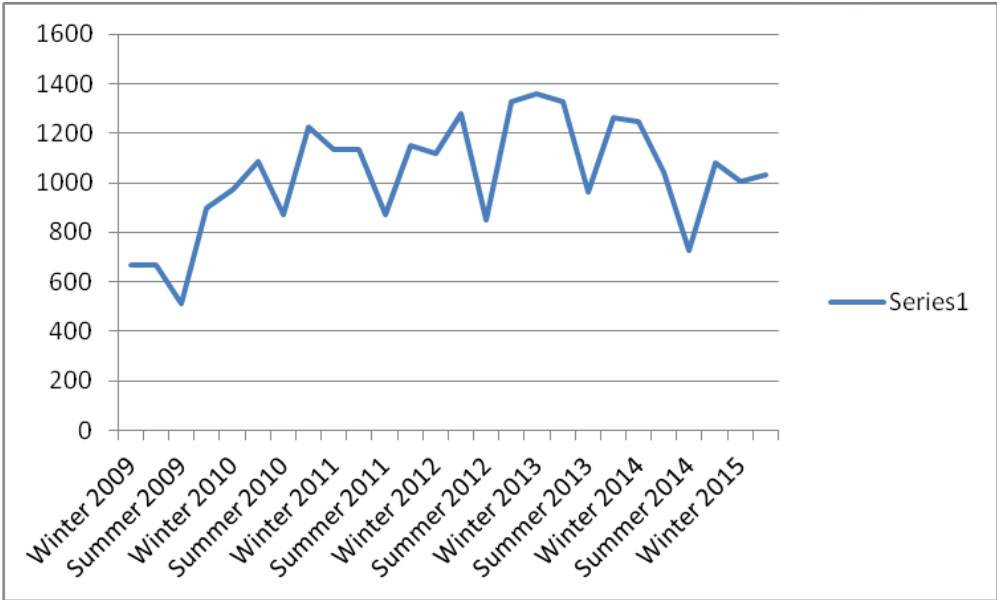|	Cascade	Rock	Sylvania	Southeast	Other	Total:
Post 9/11	125	304	265	64	9	**767**
Reserve/Guard	5	6	12	2	0	**25**
Montgomery	6	10	10	3	1	**30**
Voc Rehab	11	35	46	8	2	**102**
Dependent	25	31	35	13	3	**107**
Total	**172**	**386**	**368**	**90**	**15**	**1031**

Illustration of the trend of veteran population

Completion

The VA has begun tracking the rates of graduation of veteran students using VA Education Benefits. PCC has been reporting the instances of graduation each term. Veteran completion has been increasing due to the college policy of auto-awarding degrees as well as intentional efforts to advise and assist veteran students. Beyond the 2013-2014 year, many efforts continue to increase completion by giving veterans better access to classes and better academic advising but the numbers are not available.

Audit and Benchmarking

PCC has participated in several audits, both internal and external, assessing business practices and efficacy from the organizational perspective as well as the student experience.   Beginning in 2012 PCC has been the subject of annual VA Compliance Surveys as is required for all institutions of higher learning that have over 300 students using VA Education Benefits. Additionally an internal audit was conducted by PCC's Office of the Internal Auditor in conjunction with the review of the Aviation Science Department (AVS).   One of the initiatives of the Title III Grant awarded to PCC also includes a survey of the student veteran population at PCC to evaluate student experience. Each of these measures will be discussed in more detail below.

The student surveys administered in response to the recommendation of the previous program review with the help of the Title III Grant have allowed students an opportunity to provide feedback about their experiences at PCC. These surveys were based in part off of the format used by the Community College Survey of Student Engagement (CCSSE) which is administered to the general student population at PCC. These surveys have been sent to all self-identified veteran students and those using a VA Education Benefit. The surveys have been issued to students each Spring term in 2012, 2013 and 2014.

Veteran students consistently self-reported that they used student services less frequently than the general student population, but also self-reported that they are more satisfied with most student services departments than the general population.

This student survey data is often used to inform the committees which address veteran experiences at PCC. This data is also used by District and Campus Student Services leaders and other groups who may be looking to offer training or awareness events for students, staff or faculty.

Veteran Student Graduates
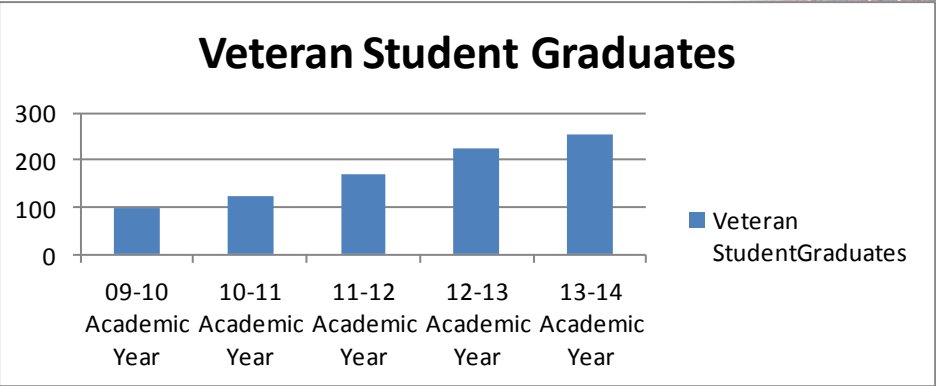
Who are PCC Veterans?	
2012 Survey Results	**2013 Survey Results**
Gender	
89% Male	85% Male
Age	
30% 25-29 y.o.	23% 25 - 29 y.o.
48% 30-49 y.o.	50% 30-40 y.o.
Work Hours	
23% Work Full-time	18% Work Full-time
60% 0-5 hours/week	63% 0-5 hours/week
Military Service Dates	
65% After Sept 11, 2001	63% After Sept 11, 2001
19% Between 1991 - 2000	15% Between 1991 - 2000

What do student veterans tell us?	
2012 Survey Results	**2013 Survey Results**
% who find it easy to have education benefits certified to the VA	
71.70%	77.50%
% who are comfortable telling classmates of their veteran status	
71.90%	68.90%
% who are somewhat or very likely to attend a veterans-only workshop	
73.60%	66.40%

2010-11: Year One

Establishing the Baseline

2009 Program Review

In 2009 an internal review was conducted that was largely informed by the American Association of College Registrars and Admissions Officers (AACRO) SWOT assessment done that year for PCC Veteran Services. The two day AACRO review was requested by the Dean of Student Services. Among the items noted were the was strong institutional knowledge of the tenured staff. However, the report also noted that the staffing model had not changed with the growing population. Several recommendations were made for continued improvement

Title III

Portland Community College leveraged a Federal Title III Grant which identified that student veterans who were unclear about selecting courses were needing to change schedules which caused delays and denials of benefits and impacted student success. One objective of this grant was to reduce the number of student veterans who were adjusting academic schedules with the goal of improving retention and completion.

Getting Started

In 2010-2011 PCC received the Title III Grant, providing resources to impact student veterans and hired a Financial Aid/Veteran Services Coordinator to coordinate the growth efforts of the college. The 2008 program inquiries that created the 2009 Program Review also identified the need for a military billing specialist. The District implemented this Student Affairs position in 2011 with the help of the Title III Grant. This position is instrumental in processing the third-party billing student using military Tuition Assistance, works to reconcile accounts between Hillsboro Aviation and processes the billing of VA Vocational Rehabilitation. Securing this grant funding and staffing allowed the college to be ready to move forward with the future initiatives.

Recommendations for Improvement

- **Develop support for student veterans at each campus**

- **Coordinate relationships with various offices with a Veteran Coordinator Position**

- **Decentralize services for student veterans across the**

Title III Goal

- **"Reduce the proportion of Veterans benefits applicants who have to be re-certified"**
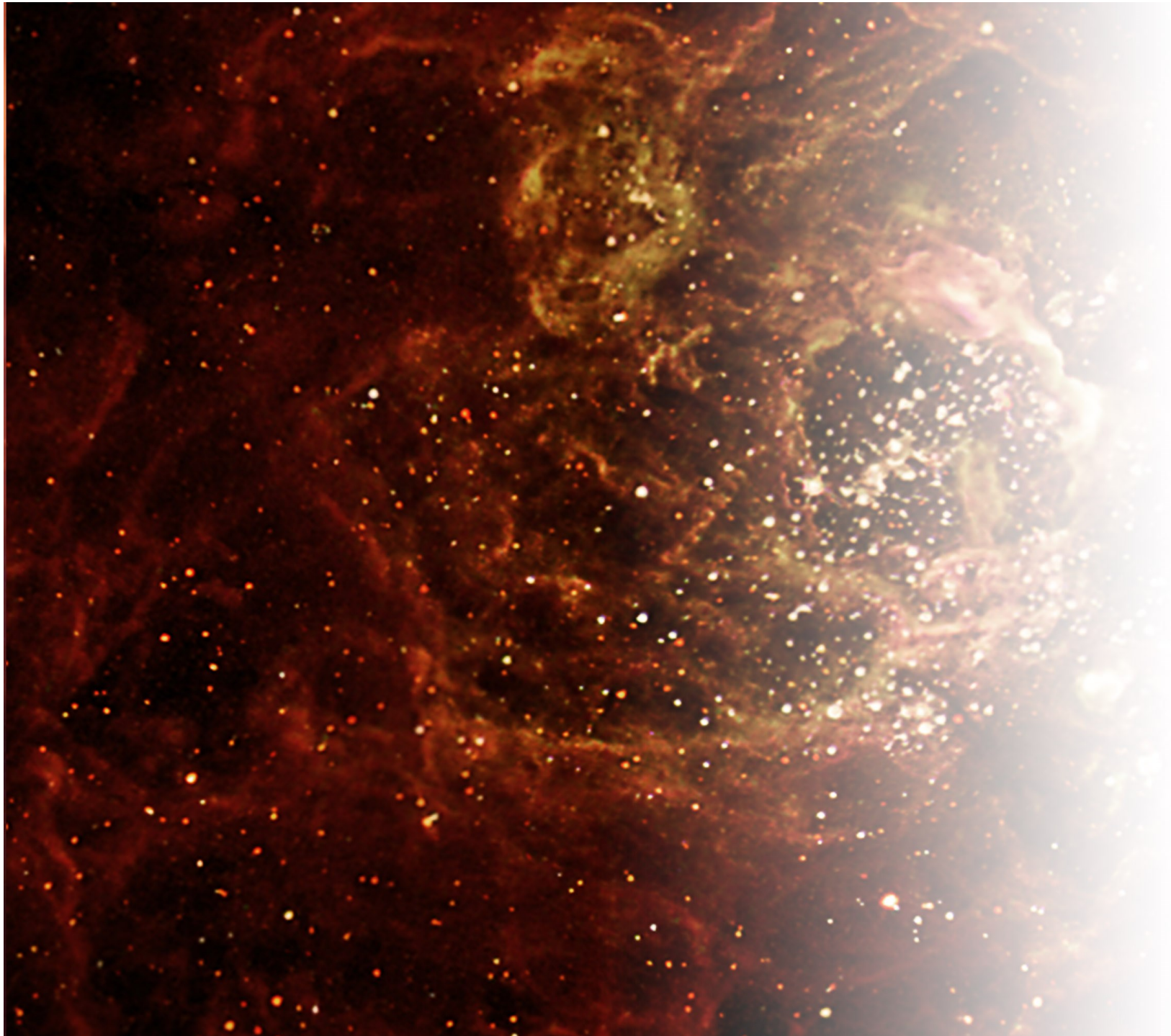
2011-12: Year Two

Gathering Resources

Compliance Survey

In the summer of 2012 the VA initiated a compliance survey for PCC for the first time in several years. At that time the VA was assessing the accuracy of PCC's certifications of education benefits. The VA selected 50 files at random and examined all VA related information including the timeliness of the reporting, the accuracy of the credits and tuition assessed and the accuracy of the dates of the courses that are reported. The VA recognized a large number of findings relating to the certification of non-standard terms that PCC offers during summer term. These courses do not follow the standard term dates and therefore need to be reported in a different manner. The VA issued new guidance at that time that clarified the correct way to certify these non-standard terms in summer. The VA required that PCC staff perform an expanded review of every certification that had been processed from Fall of 2010 to Summer of 2012 and correct any discrepancies. PCC Veteran Services Office staff completed this task to the satisfaction of the VA which concluded that audit. Since then, PCC has corrected the process for certifying those non-standard summer terms and has worked with the catalog and curriculum offices to create a new method of reporting the summer term course lengths that will simplify certification for VA benefits.

Staffing

In response to the AACRAO review of PCC Veteran Services completed in 2008, PCC has enhanced staffing of the office. At the time of the review in 2008 PCC had 2 full time veteran specialists. That report recommended adding staffing and creating some model to decentralize and provide services at campuses throughout the district. During this year PCC became fully staffed with 4.5 FTE to serve student veterans with their education benefits.

In addition to more college employees, VA work-study students were leveraged more effectively by the office. Job duties for work study students has always included maintaining veteran student files and have expanded to include accessing student records to answer basic student inquiries in person or on the phone. Work-study students also help with other projects to allow certifying officials to focus on things that require more depth of knowledge and access to further records.

Linking Statements

Mission and Values

*Compliance surveys ensure **professional growth of employees** and helps students with **college expenses***

Panther Path

*Assuring adherence to VA Regulations assures students can continue on the **panther path***

Strategic Plan

*This routine process ensures students **environmental sustainability** through VA Approval of continued funding*

Linking Statements

Mission and Values

*Proper staffing ensures that staff can **assist students in utilizing** benefits by giving **effective access***

Panther Path

*Additional staff give information more effectively to students, especially in the **prepare** phase when securing funding*

Strategic Plan

*Access to staff allows student **opportunity to access** and **guidance while they access** VA Education Benefits to attend PCC*

Training

In response to the 2008 program review improvements have been made for training for Veteran Certifying Officials (Veteran Specialists and Coordinator). Training begins with completion of the on-line training from the VA GI Bill website. Subsequent extensive training is done at the college to focus on items that are specifically relevant to PCC due to the types of training offered. This involves observing as Certifying Officials conduct business both in processing and customer service. Ongoing training is done both through monthly office meetings and through PCC staff attendance at local and regional VA sponsored trainings. At least two staff members attend the annual Western Association of Veterans Education Specialists (WAVES) conference each year. At least two staff members also attend the Oregon VA Education Benefits Conference organized by the VA Education Liaison Representative (ELR) for Oregon State. These trainings ensure that PCC staff-members keep current with changing rules and regulations and that PCC staff maintain open communication and relationships with VA representatives.

Additional training has begun within PCC to achieve cross-functionality for Financial Aid Advisors to be knowledgeable about veteran questions and Veteran Services staff to be knowledgeable about Financial Aid questions. This will allow for a greater depth of staffing when demand increases in the Veteran Services area, as well as a more holistic experience for students who may be using financial aid in conjunction with veteran educational benefits.

Other areas where reporting has been improved include the creation of new reports to assist Veteran Services staff in achieving timely reporting of necessary information to the VA. One of the threats identified in the 2008 AACRAO and 2009 Program Review was that staff was unable to adequately gather some of the data that needs to be reported to VA and report it in a timely manner. Specifically there were no reports indicating which students using VA Educational Benefits had reached a point of Graduation, Academic Probation or Suspension, or who received F-grades. There was a report that could detect when students had added, dropped or withdrawn from a course but it contained a significant amount of irrelevant data and using that report was a burden. These reports are now created and improved. Veteran Services Staff have the ability to run these reports to identify the cases that need to be reported to the VA. This allows staff to adhere to the VA reporting requirements.

The previous program review also identified a weakness in the tracking and maintaining of paper files. This became particularly evident as the district staffing model expanded services to all campuses. In response to this and in line with the overall College's vision these have been made electronic. All paper files have been imaged and shredded and all new files are started as electronic files. Notes about contact with students are kept with each interaction in the Banner screen SWACMNT as recommended by the program review.

Training to standardize the use of these reports and technology features with each student has streamlined District operations and interactions with student veterans.

Linking Statements

Mission and Values

*Adequate training allows staff to **assist students in utilizing VA Education Benefits to their best advantage***

Panther Path

*Training allows seamless tracking and reporting as students **engage, commit and complete***

Strategic Plan

*Continued training provides students with **sustainable excellence** when interacting with staff*

Technology

Another area that has been enhanced is the technology to send out more communications to students. Emails are sent throughout the terms to notify students of anything that may be relevant to VA Education benefits or other veteran-related activities. New reporting allows these messages to be targeted to those receiving benefits as well as to those who are not using benefits but have self identified as veterans through their admissions application. These enhancements also address the weakness in communication that was identified in the previous program review.

One of the weaknesses identified in the AACRAO review of 2008 was the process by which students were submitting a handwritten schedule each term to the VSO for certification. This was a manual and inconvenient process for the students to submit, and for office staff to then determine the dates, tuition, fees and credits associated with each course. Through work with the Student Systems Support staff at PCC a web based submission process was created for students to submit their schedule to the Veteran Services Office from their MyPCC student veteran portal. This simplifies the process for students and also results in some reduction in manual work by PCC Staff.

Once a schedule is submitted on the MyPCC portal, the student is able to track their status on that channel. This allows students to know if they have submitted their schedule or not, if it has been received in the Office, and when the schedule has been processed to the VA. This self service makes the process more transparent to the student and reduces the volume of calls and questions from students. This step addresses another recommendation of the AACRAO review which recommended a Veterans Tracking site on MyPCC. The schedule that is generated in the office when a student submits electronically will show staff the name of the classes, number of credits, dates of classes, delivery method (online or in classroom) and the associated tuition and fees. Though reporting these items to the VA is still a manual process through VAOnce (https://vaonce.vba.va.gov/vaonce_student/default.asp), having this information all in one place on the electronic schedule eliminates several steps for the Office staff.

To the right are the messages that a student sees through the various stages of the certification process.

Linking Statements

Mission and Values
Self service technology gives students effective access and gives staff more time to help veterans

Panther Path
This transparent process gives students the confidence to focus time to engage and commit

Strategic Plan
The veteran portal and targeted communication are innovations designed to give students opportunity to access the college

2012-13: Year Three

Building Relationships

Sabbatical Report

In the 2012-2013 academic year Jackie Elliot, a PCC Counselor, took a year of sabbatical to study veterans programs throughout the United States. The sabbatical report covers programs offered to student veterans at 47 colleges. Through extensive research, volunteering and several campus visits several recommendations were identified.

Recommendation number one is to follow best practices for vets programs and services. This is to include establishing a Veterans Resource Center, a Vets Lounge and increase staff and faculty training. This also included information about other local colleges that have offered veteran specific courses with content and delivery that could help student veterans succeed. Recommendation number two is to create a peer-to-peer veterans mentoring program. Recommendation number three is to provide training to counselors on veterans mental health issues. Jackie Elliott volunteered with the Returning Veterans Project through Portland and was exposed to a range of mental health issues and intervention techniques. These recommendations have been passed on to the PCC Veterans District Task Force, Academic Student Affairs Council and District Student Services Leaders.

Internal Audit

In 2012 the PCC Office of the Internal Auditor conducted an audit of the Aviation Science Department which includes many students using VA Education Benefits. This audit included an audit of Veteran Services processes and concluded in September 2012. As part of this audit the business processes of the Office were examined. This audit concluded that PCC has adequate business practices and reporting to ensure the proper handling of VA dollars between PCC, Hillsboro Aviation, students and the VA. The conclusion of the audit was that PCC has adequate controls in place to reconcile these finances. The audit did not duplicate the work of United States Department of Veterans Affairs (USDVA) compliance surveys which focus on certification of courses and thus only recommends that PCC maintain compliance to the standards of the USDVA.

Linking Statements

Mission and Values

*Supporting the sabbatical demonstrates that **PCC recognizes the sacrifice of those who have served***

Panther Path

*Diverse student services help students to **thrive** and **complete***

Strategic Plan

*The sabbatical report informs PCC how **innovative partnerships** can help to **drive student success***

Linking Statements

Mission and Values

*Routine compliance ensure **professional growth of employees** and helps students with **college expenses.***

Panther Path

*Assuring adherence to VA, Federal and College Regulations assures students can continue on the **panther path***

Strategic Plan

*This routine process ensures students **environmental sustainability** through VA Approval of continued funding*

Academic Advising

Students and staff reported inconsistencies in students' access to academic advising and self-advising tools. In 2012 a survey of student veterans was administered by PCC Institutional Effectiveness. In this survey 95.5% of respondents indicated that academic advising or planning was important to them, however 45.3% of respondents indicated that they had rarely or never used academic advising. Other evidence collected through the work of the Title III FLAIR Grant showed that student veterans were changing their schedules numerous times before a term began. This was problematic for administering benefits and seemed to indicate that students were unsure about the best courses to sign up for initially.

In October of 2010 PCC released the first version of GradPlan to PCC students. This version and its subsequent versions have allowed students to self-advise and see what requirements for their educational goal have been met, and what requirements still exist. This addresses the Program Review recommendation to provide students with easy access to degree checklists. This allows students to have full access to their degree information at any time as well as the ability to perform a "What If" audit to show potential other degree options.

Additionally, the office has presented to full and part-time advisors at various in-service days and established positive working relationships and paths to refer students to advising and counseling staff. The greatest enhancement to the student veterans' advising experience is the VA Advising Workshop.   Noting the importance of proper Academic Advising for students in completion and in maintaining the funding necessary to continue in school prompted the beginning of a lot of effort to support students in this area. This begun a long process of creating a new advising model with significant input from both Academic Advising and Veteran Services. This required the additional assistance of web-team and media services as well as the driving resource of Title III. The efforts finally culminate as VA Advising Workshop in the 2014-2015 year.

Linking Statements

Mission and Values
*Proper advising allows students to **use their benefits to their best advantage***

Panther Path
*Academic advising is crucial for students as they **engage** and **commit** as well as being able to successfully **complete***

Strategic Plan
*Intentional interactions with academic advising are part of the **culture of innovation** to **drive student success***

2013-14: Year Four

Making progress

Technology Enhancements

In order to lower barriers for students to access Veteran Services several enhancements were added. This included modifying the Veteran Services web presence to include simple instructions, PDF forms available on-line and several electronic contact methods.

The PCC Website was re-structured to more clearly show all the services offered. The restructure created a landing page of PCC Veteran Resources from which students can link to Veteran Services, Veteran Resource Centers and other PCC and Community support services. The PCC Veteran Services website received a re-design using the same format as the FACT team to provide clear, step-by-step information for students. The language used is clear and concise without distracting features or links on the page.

The PCC website has also been enhanced with Frequently Asked Questions through Ask The Panther. These questions guide students through the process of using VA benefits at PCC. The answers cover common student questions about the process, payments, debts, financial aid and schedule changes. Students are able to use this self-service to find answers without having to seek out an individual from the Office.
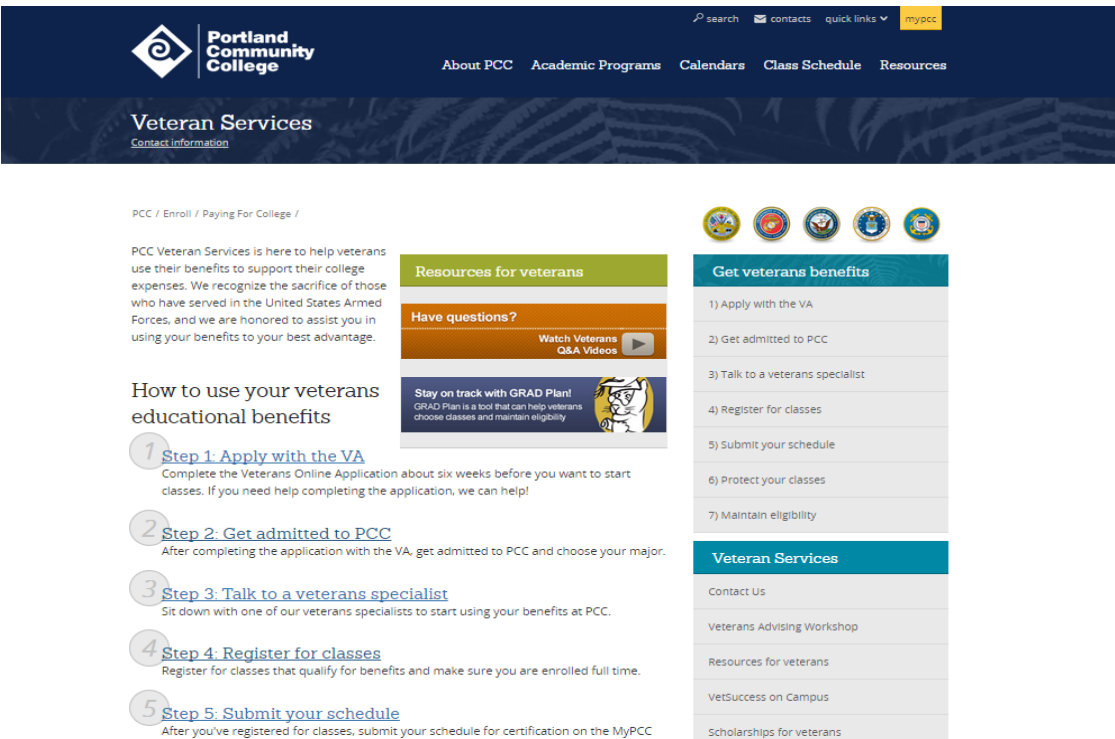
Compliance Survey

In the summer of 2014 the VA again sent compliance specialists to PCC, accompanied by the Oregon State Approving Agent (SAA). Again the initial group selected was 50 files. During this compliance survey the number of discrepancies detected was again within the acceptable margins of VA's standards. Small changes were made to address the reporting of the end date of a term because the final date of the term falling on a Sunday as published in the PCC Academic Calendar was not consistent with the VA regulations regarding when a course is considered 'in-progress'. This adjustment was noted and effective going forward. No changes were required to be made to past certifications.

Principles of Excellence

In the spring of 2012 the White House issued Executive Order 13607 establishing Principles of Excellence for educational institutions. This required that schools that participate in the Tuition Assistance program for active duty military members follow guidelines to provide students with upfront information about expense and outcomes. Specifically the order establishes that schools will provide students with the total expected cost of programs, avoid aggressive recruiting techniques, provide students with individualized education plans and designate points of contact for students to seek academic and financial advising. PCC is already in compliance with each of these requirements. As a way to strengthen the College's offerings that align with this Executive Order, PCC has implemented mandatory academic advising to ensure each student has an education plan. Efforts through the VA Advising Workshop will ensure 100% compliance with this initiative. This VA Advising Workshop will be discussed in greater detail in this report.

PCC submitted an intent to comply with each of the newest versions of the Memorandum of Understanding. PCC's commitment to comply with this highlights the College's dedication to serving student veterans as well as letting prospective students know that PCC is a welcoming institution for veterans. When students look to the VA for guidance about choosing a school they are directed to a 'VA GI Bill Comparison Tool' (http://department-of-veterans-affairs.github.io/gi-bill-comparison-tool/). Complying with the MOU allows PCC to be listed on the VA website as a "Principles of Excellence" Institution.

Linking Statements

Mission and Values
*Compliance surveys ensure **professional growth of employees** and helps students with **college expenses***

Panther Path
*Assuring adherence to VA Regulations assures students can continue on the **panther path***

Strategic Plan
*This routine process ensures students **environmental sustainability** through VA Approval of continued funding*

Linking Statements

Mission and Values
*Recognition as a Principles of Excellence school informs students that PCC provides **effective access to any VA educational benefits they may be entitled to***

Panther Path
*Principles of Excellence ensures students have information as they prepare as well as ensures services as students **engage***

Strategic Plan
*The Principles of Excellence assists in **achieving sustainable excellence** to **drive student success***

Improved Communication

The Veteran Services Office communications were reviewed through the FACT Process and the language has been clarified and strengthened. This language is more clear to students and is consistent from all staff members and to all students. This includes creation of form emails and improvement to forms used to disburse information to students. The Veteran Services Office also has a calendar of targeted messaging to students to remind them at different points in a term or year about important milestones to meet for VA registration and certification to ensure success.

Linking Statements

Mission and Values
*Consistent and timely messaging **assists students with effective access to VA Educational Benefits***

Panther Path
*Timely reminders help students focus their energy on what they are doing to **engage** and **commit** without worrying about funding*

Strategic Plan:
*Keeping students informed helps to **drive student success***

Veteran District Task Force

PCC has identified that some campus initiatives are being very well received but the same services have not been available for students at other campuses. While some of this has been due to staffing and physical location limitations, there could still be efforts to help align the district with policies and services offered more equally throughout the District. To this end the district has convened a group of stakeholder representatives from throughout the District. This group includes Student Services leaders, Faculty, Advisors, Students, Administrators and others.

The goal of this taskforce is to tackle the growing issues surrounding veteran integration into PCC by taking proactive steps to streamline processes, increase awareness, decentralize services, and help the veterans with the transition from military life to college. Doing this increases PCC's image within the community, offers a secure and reliable source of funds through students using GI Bill to pay tuition, and help to mitigate any problems that do arise with transitioning veterans. The taskforce prioritized several projects as priorities and worked to see them through. The first priorities for the task force were identified as creating a veteran-specific orientation of some kind and to explore veterans priority-registration. Much work was done to roll out these services in 2014-2015 as a veteran advising workshop and first-group registration.

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Linking Statements

Mission and Values:
*The efforts of the Task Force **recognize the sacrifice** and **utilize benefits to students' best advantage***

Panther Path:
*The holistic approach to enhancing services for veteran students promotes success in all stages of the **panther path***

Strategic Plan:
*The Task Force supports a **culture of innovation** working to achieve **sustainable excellence***

Veteran Success on Campus

In 2013 PCC was chosen by the VA to participate in the new VetSuccess On Campus (VSOC) program. This program provides a VA employee who works on campus and is a liaison for students to access VA resources beyond education benefits. PCC was chosen to participate due to a number of factors including the large number of veterans attending PCC. There are about 100 colleges in the nation who have been selected to participate in this program so far.

The VA VSOC appointed to PCC is Steven Gordon. Steven Gordon is a former VA Vocational Rehabilitation employee who has worked with students pursuing an education at PCC in the past. The VSOC role is to pursue outreach to student veterans and offer services to help students succeed both in education and in transition to civilian life.

VetSuccess on Campus (VSOC) at PCC has provided Veterans benefits information and referrals to 1089 Veterans and eligible Dependents, from October, 2013 to present. Beginning in Spring Term 2014, new PCC students using VA Education or Vocational Rehabilitation and Employment (VR&E) benefits, as well as PCC students using VA Education or Vocational Rehabilitation and Employment (VR&E) benefits who were on Academic Probation or Suspension, were contacted by email on behalf of VetSuccess on Campus, introducing them to the VSOC program and providing contact information and description of services that are provided.

PCC has listed this resource for veterans on the Veterans Resources page and created an informational page about this. The PCC resources page is http://www.pcc.edu/enroll/paying-for-college/veterans/resources.html. The infor-

What is VetSuccess?

VetSuccess on Campus is a program through the Veterans Benefits Administration that places an experienced Vocational Rehabilitation Counselor directly on campus to provide assistance and support to veteran students and their eligible family members.

mational page is found at www.pcc.edu/VetSuccess.

2014-2015: Year Five

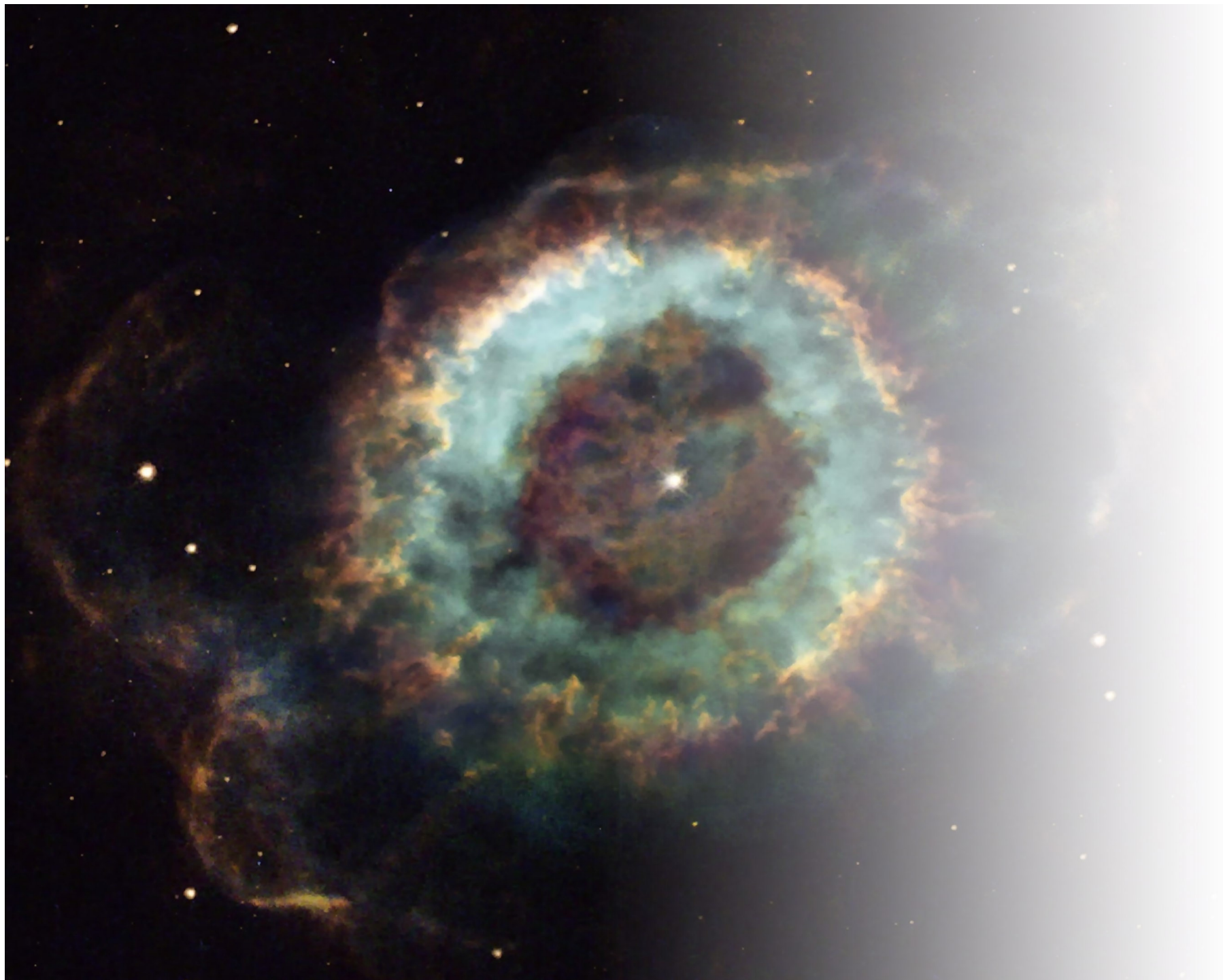Improving Student Experience

VA Advising Workshop Becomes Real

This workshop is offered each term to our new students who are receiving benefits with the goal of making it easier to successfully use those benefits to achieve an educational goal. The workshop is led by a partnership of PCC Academic Advising staff as well as PCC Veteran. Each student receives specific information about their VA Education Benefits and is subsequently expected to meet with an advisor and create a three-term academic plan prior to registration for the next term. This workshop provides the information to students that was recommended in the 2009 program review.

These sessions are created as 2 hour sessions that cover specific details about the education programs offered at PCC including what the requirements are for each program. The other area of focus for this workshop is to explain the process of using GI Bill and the common errors or situations students may want to avoid. In Winter 2014, 16 sessions were offered across the four campuses of PCC. Students were able to choose the one that worked best for them. Throughout the two term period this was being piloted significant efforts have been made to promote student attendance. Students were contacted via email, postcard, and phone calls. Despite these efforts, fewer than 25% of the new students using VA Education Benefits actually attended the sessions.

 The discussions with students who did attend a session were overwhelmingly positive including recognition of many important things that students did not previously recognize. The students reported leaving the sessions with a clear understanding of PCC's degree offerings, courses required for those degrees and how to use their VA Education Benefits to pursue their education. Students are also shown how to use GradPlan to be informed about what courses are considered eligible for VA Educational Benefits.

One of two surveys was sent to students who were invited. One was sent to those students who did attend and another to those who did not. 94% of the students who attended the session and responded to the survey indicated that they would recommend the session to another veteran student. Also, 80% of those students who did not attend indicated that they were aware of the session but still did not attend.   Because of low attendance, a registration hold was created to ensure that students attend a workshop and meet with an advisor to receive all of this necessary information and create their educational plan. An electronic delivery method was also developed to better serve students for whom it is not possible to attend an in-person session.

By implementing a registration hold for these students attendance increased to 82%. Over the course of the 2014-2015 year, 565 identified to participate, 463 completed workshop (82%). Of the students who participate in the workshop, over 90% then persist and register in the following term. This first cohort of students who were required to attend the session also were surveyed about the sessions and 80% of respondents indicated they would recommend the session to another veteran student. This cohort will be tracked to measure impacts in retention, completion and use of services like academic advising.

At the conclusion of each session other campus resources are highlighted for students to access. This includes very short introductions by staff from different areas of student services and/or hand-outs from different offices. Students often become aware of services like tutoring, disability services, women's resources, multicultural center, veteran clubs, VetSuccess on Campus and a variety of other possibilities that they may have been unaware of in the past.

Linking Statements

Mission and Values

*Advising Workshops assist students in **utilizing benefits to the student's best advantage.***

Panther Path

*Advising Workshops give students tools to use as they **engage** and **commit***

Strategic Plan

*This workshop uses **innovation** to **drive student success***

VETERAN ADVISING

ADVISING WORKSHOPS FOR NEW VETERAN STUDENTS ARE SCHEDULED !

Are you in your first terms at PCC?
YOU ARE INVITED!
for VA Education Benefit Users

PRESENTATION TOPICS

This is a perfect opportunity for you to...

1 Be advised about degrees & majors

2 Know more about GRAD Plan

3 Set an appointment with an academic advisor to create a 3-term plan

4 Learn how to choose classes that will be covered by your VA Benefits

5 Understand elective options and other important VA issues

GET THE MOST
from your VA Benefits !
Workshop: Weeks 3 & 4 of term
SIGN-UP AT
www.pcc.edu/va-workshop

Veterans First-Group Registration

Through the work of the District Veterans Task Force and with input from the Veterans Sabatical Report about nationwide trends, PCC has begun offering all veterans and dependents using a GI Bill benefit the opportunity to register in the first group of students. This makes PCC a leader in the state and the nation in extending this to students who face additional restrictions to their classes because of the tight restrictions of what the GI Bill can pay for. This makes PCC recognizable as a veteran friendly college. There is pending legislation in Oregon that would extend this type of benefit to other veterans who are not using GI Bill benefits beginning Fall of 2016. PCC will respond to the final legislation and comply once the legislation is finalized. This can be used as a marketing tool to enroll students as well as to help students complete by giving them the ability to select the classes they need.

Linking Statements

Mission and Values
*First-group registration demonstrates that PCC **recognizes the sacrifice** of service-members and **assists students in utilizing VA education benefits***

Panther Path
*First-group registration allows students to **engage** and **complete***

Strategic Plan
*First-group registration is part of our **culture of innovation** that **improves opportunity** and **drives student success***

Section 702 Veterans Access, Choice and Accountability Act of 2014

Legislation was passed in 2014 that covered students using GI Bill at any public institution must be charged at an instate rate. PCC Policy already allows that any students who reside in the state of Oregon or a neighboring state be granted in-state tuition rates upon demonstrating residence in the state. PCC has submitted its agreement to comply with this new legislation and ensured that the catalog language ensures continued compliance.

Linking Statements

Mission and Values:
*In-state tuition rates help students **support their college expenses** and provides **effective access***

Panther Path:
*Guaranteed in-state tuition rates help students to focus on **engaging** and **completing** with reduced financial constraints*

Strategic Plan:
*Reasonable tuition grants students **improved opportunity** and **drives student success***

2015-16: The Future

Results

Much has been accomplished over the past five years of dynamic change and improvement. The resources at PCC have been streamlined to efficiently and effectively serve students through student self-service tools, transparent information and adequate staffing made available at all four campuses. Throughout PCC's enhancement of services it is important to note that many legislative and regulatory changes have come and gone. Staff should be commended for achieving these improvements in student service despite complex regulatory changes that continue to evolve. Though we cannot determine the exact impact each of these improvements has had, overall improvements in staffing, technology, and communication have had positive impacts.

- The processing time of the Veteran Services Office has been reduced from 4 weeks during peak time, to less than 2 weeks at the same peak time.

- The number of students making changes to their schedules that requires recertification fell from 24.36% in Fall 2010 to 16.68% in Fall 2014.

- Student completion has increased 104% between the 2010-2011 year and the 2013-2014 year by

Continued Progression

Over the coming years the PCC Veteran Services Office will continue to refine its services. In the immediate future the office has prioritized:

- Analyze student survey results—Institutional Effectiveness is currently administering a survey that will assess students perceptions of using Veteran Services at PCC and compare those rates to general student populations where applicable

- Naming of Services—PCC Veteran Services Office will be renamed before the beginning of the 2015-2016 year to help clarify for students the purpose of the office. The office will be renamed the Veterans Education Benefits Office. This will help students to recognize the focus of this office is to support them in using their VA Education Benefits and separate these services from the Veterans Resource Center.

- Refine VA Advising Workshop—PCC will continue to track the retention and completion of the students who have attended the VA Advising Workshop. This data will be compared to other cohorts of vets and non-vets to determine how the Advising Workshop is impacting the students.

- Monitor and remain proactive in adopting practices consistent with evolving national trends in veteran students, legislation and regulation.