SERVICE UNIT REVIEW

REV. 10-05-2017

UNIT NAME: FINANCIAL AID AND VETERANS SERVICES **REVIEW CONTACT: ALAN PIXLEY**
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GUIDELINES

Time Frames:

1. **Scope**:
   The time frame of program review is five years, including the year of the review.
   Data being reviewed for any item should go back the previous four years, unless not available.
2. **Deadline Dates**:
   January 15th – Program Review Document due to Department Supervisor for review
   February 1st – Program Review Document due to Program Review Steering Committee
3. **Years:**
   Years 1 & 3 – Implement Action Plan of (CIP) and collect data
   Years 2 & 4 – Analyze data and findings, Update Action Plan
   Year 5 – Write Program Review of past 4 years; Write Continuous Improvement Plan (CIP) and create new Action Plan

LENGTH OF RESPONSES: Information provided to each question may vary but should be generally kept in the range of 1-2 pages.

EVIDENCE GUIDELINES: In the following sections, you will be asked to provide evidence for assertions made.

a. **Sources**: This evidence may come from various sources including Collin College faculty and staff, Service Unit Student Satisfaction Surveys, Service Unit Faculty/Staff Surveys, Ruffalo Noel Levitz Student Satisfaction Surveys, IPEDS Data, National Community College Benchmarking Project data, peer surveys, or unit-level data and surveys. This evidence may be quantitative and/or qualitative. If you are unfamiliar with any of these information sources, contact the Institutional Research Office (IRO) at: effectiveness@collin.edu. Use of additional reliable and valid data sources of which you are aware is encouraged.
b. **Examples of Evidence Statements**:
   1. Poor example: Employees are encouraged to embrace the College's core values. (Not verifiable)
   2. Good example: Core values are discussed with each employee in annual performance evaluations. (Verifiable, but general)
   3. Better example: Core values are discussed in annual performance evaluations and employees are expected to include one goal that will demonstrate personal improvement related to a core value and document, in the next annual performance evaluation, their accomplishment of that goal. (Replicable, Verifiable)

FOR MORE INFORMATION: Documentation can be found at http://inside.collin.edu/institutionaleffect/Program_Review_Process.html. Any further questions regarding Program Review should be addressed to the Institutional Research Office (effectiveness@collin.edu, 972-985-3714).

Section I. *Are We Doing the Right Things?*

1. WHAT DOES YOUR SERVICE UNIT DO?

A. What is the service unit and its context?

This section is used to provide an overview description of the service unit, its relationship to the college and the community it serves. Keep in mind the reviewer may not be familiar with your area. Therefore, provide adequate explanation as needed to ensure understanding.

Requested points to address, but not limited to:

- *Unit's purpose (Include the unit's purpose/mission statement if one exists.)*
- *Services and products (i.e. reports, promotional materials, handouts, etc.)*
- *Service across campus/departments/district/community*
- *Regulatory standards the unit must meet*

Purpose

Collin College's Office of Financial Aid and Veterans Services guide students through the processes necessary to obtain aid from both the federal and state government. In addition, we assist our Veterans in obtaining federal benefits through the Department of Veterans Affairs. Our approach begins with outreach to potential students and takes them through the application process, the awarding process and ultimately to money in hand to pay for their school related expenses.

Our mission statement is "*We guide students through the process of obtaining financial aid resources to achieve their education goals*." Our department fills a very important role of leveling the playing field for students that might not otherwise be able to afford a college education. Approximately 26% of our students receive some type of financial assistance through our department, but 42% of our students actually apply for aid. We attempt to reach students through our web pages, workshops and high school presentations.

Services and Products

The college participates in various federal and state financial aid programs in order to provide the necessary funds as listed below:

- Pell Grant
- Supplemental Educational Opportunity Grant
- Federal Work Study
- Direct Subsidized Student Loans
- Direct Unsubsidized Student Loans

- Parent Loan for Undergraduate Students
- Texas Educational Opportunity Grant
- Texas Public Education Grant
- Foundation Scholarships
- College Access Loans
- Texas Work Study
- Chapter 30 Veterans Administration Education Benefits
- Chapter 33 Veterans Administration Education Benefits
- Chapter 35 Veterans Administration Education Benefits
- Chapter 1606 Veterans Administration Education Benefits
- Hazlewood Exemptions
- Deaf and Blind Exemption
- Adoption Care Exemption
- Foster Child Exemption
- Child of Nursing Staff
- Child of Disabled Fire/Police

All of these programs have various eligibility requirements and application processes that require a highly trained staff that can help navigate the student through the entire process of application, eligibility review, verification, certification and the awarding of benefits to eligible students.

Service Across the District and Community

A Financial Aid Office is located on each of the three main campuses and consists of a manager, financial aid advisor(s) and financial aid specialist(s). Each financial aid office has specific responsibilities for the entire district. For example, the staff at the Central Park Campus processes all student loans, the staff at Preston Ridge Campus process all return to title IV and the staff at the Spring Creek Campus processes the exemptions. The department has a technology team that is housed at the Collin Higher Education Center that acts as a central processing operation which oversees the technological aspects of Banner and our third-party systems are required to interact with the Department of Education and the Texas Higher Education Coordinating Board.

A Veterans Resource Center is also located on each campus with a mission of assisting Collin College Veterans with resources to enable them to be successful at Collin. These resources are both internal and external to the College. In each of these centers we are providing Veterans with resource information both internally and externally. Our employees have assistance information for housing, food, health services, counseling and support of Veterans. We are able to refer these students to both internal and external sources in order to help them be successful in the classroom.

The independent school districts and other organizations of Collin County are served by the financial aid staff. Over 75 presentations are made each year to local high schools and other agencies regarding the Free Application for Federal Student Aid (FAFSA). Presentations are presented in both English and Spanish, with the intent being to help students navigate the application process and to equip students with information regarding financial aid, regardless of where they are going to College.

Regulatory Standards

Financial aid is a highly regulated service. Regulatory standards are set by various agencies including:

- Department of Education
- Department of Veterans Affairs
- Department of Defense
- Department of Homeland Security
- Texas Higher Education Coordinating Board
- Texas Veterans Commission
- Code of Federal Regulations
- Texas Administrative Code

Each year, new regulations and guidance is given on existing programs and is consistently monitored to ensure compliance with the regulatory agencies. The authorization for federal student aid is governed under the Higher Education Act of 1965 and is reviewed and updated every five years. This document alone is over 500 pages and is then followed by numerous regulations, hand books, dear-colleague letters and other written interpretations of the regulations.

A federally mandated A-133 audit occurs each year and must be submitted to the federal government. A sample of students are selected each year and a battery of tests are conducted to ensure that federal regulations are being followed. An annual survey (audit) is also conducted by the Veterans Affairs Department. A sample of students is reviewed to determine that Veterans Education benefits are being administered according to federal regulations.

In 2015 the Financial Aid Office went through a federal program review. This was a comprehensive review that entailed everything from student eligibility, proper awarding, timely disbursement and reporting, entrance and exit counseling, loan, grant and federal work-study administration, FISAP review, return to title IV compliance and consumer information requirements. When the review was completed we were pleased to learn there were no findings.

In addition to the external reviews noted above, the Assistant Director for Compliance conducts monthly reviews concentrating on higher risk processes . These reviews are conducted to ensure that federal and state regulations, as well as, Collin policies and procedures are being followed. We use these reviews to develop training and to refine our procedures.

B. Executive summary: briefly summarize the topics that are addressed in this self-study, including areas of strengths and areas of concern. (Information to address this Executive Summary may come from later sections of this document; therefore, this summary may be written after these sections have been completed.) Using the questions in the template as headings in the Executive Summary can provide structure to the overview document.

We have seen significant progress in our ability to serve our students in a timely and comprehensive manner in Financial Aid. The Collin College Unit student surveys (Fall 2014 and Spring 2017) show a 10% increase or more in every customer service area since the last program review in 2012. Student wait times have diminished from hours to minutes and the overall student experience has shown significant improvement as described in the survey. Even the student comments show a complete change in our attitudes toward our students and our willingness to serve them better.

	Spring 2012	Fall 2014	Spring 2017
Hours Available	4.11	4.15	4.36
Timely Service	3.92	4.00	4.34
Courteous Staff	4.06	4.18	4.46
Knowledgeable Staff	4.07	4.22	4.48
Overall Satisfaction	3.91	4.05	4.32

The increase in our customer service performance ratings by the student survey can primarily be attributed to two factors, employee training and a fuller utilization of Banner's capabilities.

Employee training was made a priority four years ago. Each employee attends multiple in-house training meetings, including an annual training that occurs at the beginning of our new aid year rollout. The training sessions focus on customer services, regulatory training, Banner and other systems training. We have given all employees an opportunity for external professional development and all of our leadership members have participated in our national financial aid association's leadership institute. In addition, all of the leadership team members have earned certificates of proficiency in various areas of financial aid administration.

A comprehensive utilization of Banner Financial Aid was made a priority in 2013-2014. We conducted a complete review of the financial aid module of Banner and brought in consultants from Ellucian to determine how we could better utilize the system. During out review we discovered several setup issues and compliance issues that needed to be addressed. We implemented significant changes to our processing

windows and were able to reduce processing time by days. Over 100 exception reports have been written that look for potential problems in the student processing cycle so that adjustments can be made without the student having to bring the problem to our attention. Here is a list of some of the processes that we were able to fully automate or provide better tracking capabilities:

- Automated packaging process for all students to replace the manual awarding that was happening with some students.
- Used algorithms to correctly calculate Satisfactory Academic Progress.
- Automated the sending of student files to the Department of education, which had been previously done by hand.
- Implemented a status tracking system so we could determine where each document was in the review process.
- Streamlined our use of student requirements to clearly identify what documents the student needed to submit.
- Completed a review of Banner Self-Service resulting in a completely new menu.
- Reduced the number of keystrokes a student needed to take to get to their information in self-service by more than 50%.
- Created student specific messages that appear in self-service based on their unique situation.
- Implemented the use of messages in CougarWeb to alert student about actions they need to take.
- Created a financial aid checklist with in CougarWeb so that a student can see exactly where they are in the financial aid process.
- Used the power of AppWorx to automate Banner jobs so employees could be freed up to serve students.
- Created automated e-mails to alert students to documents that need to be submitted.
- Locked down some financial aid funds so that they only paid if the appropriate charges existed.
- Utilized rules to keep aid from disbursing unless certain requirements are met.
- Streamlined the complex process for “Return to Title IV” to reduce the number of errors being made.
- Automated the awarding of the Texas Education Opportunity Grant.
- Automated Continuing Education aid process.
- Completely revamped the student loan process.
- Utilized Banner functionality to allow students to accept a portion of their financial aid.
- Reviewed and streamlined the budget process for all students.
- Corrected communication/connectivity issues between Banner and Global so that files were sent and received in a timely basis.
- Implemented procedures for the timely processing of students that went into suspense.
- Reduced the number of Satisfactory Academic Progress codes from 40 to 16.
- Implemented BDMN scanning and indexing of all financial aid documents.
- Created a tracking system for the receipt and review of all high school transcripts for financial aid students.

- Created a reconciliation process for federal student loans in Banner.
- Corrected issues with the attendance reporting process.
- Automated the Master Promissory Note import process.
- Created a loan disclosure notification for all students on direct loans.
- Implemented the use of attending hours in Banner.
- Reviewed and corrected issues with Student Aid Report comment codes from the Department of Education.
- Restructured the Banner Satisfactory Academic Suspension Appeal process
- Utilized a Banner Product called Banner Workflow to create a Satisfactory Academic Progress Appeal process for approvers.
- Made adjustments to financial aid fund codes to correct regulatory issues.
- Began utilizing the Student Employment module in Banner.
- Created athletic financial aid fund codes to better administer athletic scholarships.
- Utilized Banner for federal FISAP reporting.
- Created a Banner workflow to instantly notify employees of new student documents that have been submitted.
- Created a Banner workflow to automatically recalculate Satisfactory Academic Progress when a student switches programs of study.
- Implemented gainful employment regulations using Banner, including reporting.
- Modified financial aid requirement codes to include web links to required documents.
- Created new student documents to be utilized for verification.
- Moved financial aid file processing to off-hours to improve the timeliness of the awarding process.

The Financial Aid Call Center was established in 2012-2013 to handle the large number of calls that were being received. Students had expressed frustration in not being able to contact us by phone. Their only other option was to come to campus and stand in a line. The Call Center initially started with temporary employees and it took the better part of two years to really get the staff trained. In 2015 we were able to make these employees permanent members of our staff. They receive training in customer service and regulatory updates. They have been able to help us reduce the number of students standing in line. The Call Center has three permanent staff members and typically one temporary employee. The Call Center typically handles about 46,000 phone calls each year and it gives our students a convenience that enables them to get their questions answered efficiently.

Our best customer service happens when the student does not even have to come to us for anything because we were able to take care of all of their processing and clearly communicate the process; however, when interaction is necessary or desired we want to be ready to assist the student at a level in which the student is highly satisfied.

We are proud of our outreach efforts that have resulted in three times as many presentations to area high schools and potential students over the past 3 years. We have worked hard to make students aware of the programs that could be of benefit to them. The relationships that we are building with high school counselors will assist us in reaching out to students in our local high schools. Two years ago we started an annual high school counselor workshop. The training was given to 65 high school counselors in 2016 and to 57 high school counselors in 2017. The training helps prepare the high school counselors to assist their students in making the transition from high school to college. The training has been a huge success and we have had so many counselors thank us for the training and the assistance we have given to their students and parents.

While we are proud of all of these efforts, it is important to recognize that the student experience still needs to be enhanced and we must work to make sure students are aware of financial assistance available to them. One of the areas we would like to be enhanced is our ability to interact with the student in a more comprehensive way. Students' first contact is typically with the financial aid specialist. The ability to assess and assist the student at the point of first contact, we believe, would be better accomplished by upgrading the first line staff from specialist to advisor. Our ability to communicate and guide our students through the complex financial aid process is sometimes hindered by a limited skillset at the initial point of contact. Increasing the experience and qualification of our staff directly assisting students could provide a more complete service. In addition, the work load for the current financial aid advisors could be better balanced by spreading workload among advisors if additional advisors replace the specialists. Instead of an advisor spending 75% to 80% of their time processing, their work load would be adjusted to 50% processing by spreading the processing out to more advisors. Based on the current job descriptions and classifications it would be inappropriate to have the specialists carry out the processing. Making this move would most certainly enhance the student experience and allow us to provide more comprehensive advising.

We want to see continued improvement in our customer service levels. We recognize that many students start by going to our web page; however, after hearing a presentation at a recent financial aid advisory board meeting we have come to realize that our pages are written at a reading level that is too high and with words that are not in the everyday vocabulary of our community members. The University of Texas System is working to rewrite their web pages at an 8th grade reading level. If an institution with the prestige of UT sees the need to have their pages at a lower reading level then how much more do we need to have our pages examined to make sure that all students have a clear pathway to higher education. We often use a vocabulary that is confusing to the student and one in which they have no context of understanding.

We are pleased that our Veterans Resource Centers are up and running on each of the three campuses. The expansion happened this fall with an open house at each Center. We are excited about our ability to reach out to our Veterans and assist them in a successful time at Collin and beyond.

We are working to see our students through the eyes of a guide and not as a regulation manager. While the regulations are important and must be enforced, we need to take more time to explain and help students overcome hurdles that are in front of them. Some of these hurdles include the application process with the Department of Education, the follow-up requirements assigned by the Department of Education, the timing of their award with payment deadlines and getting registered in the proper classes/programs so their financial aid will pay. As we continue to improve the dignity and respect shown to our customers, we will find better interactions with our students and can encourage those students to complete their education goals. We are working to accomplish this through our annual training, workshop offerings and the Director of 1st Impressions training. We have come a long ways and now we keep moving.

2. WHY DO WE DO THE THINGS WE DO? UNIT RELATIONSHIP TO THE COLLEGE MISSION, CORE VALUES & STRATEGIC PLAN.

- **Provide unit-specific evidence of actions that the unit supports the mission statement:** "*Collin County Community College District is a student and community-centered institution committed to developing skills, strengthening character, and challenging the intellect.*"
- **Provide unit-specific evidence of actions that support the case that the unit and its faculty contribute to fulfillment of the college core values:** *"We have a passion for Learning, Service, Involvement, Creativity, Innovation, Academic Excellence, Dignity, Respect and Integrity."*
- **Provide unit-specific evidence that supports how the unit supports the college strategic plan**: http://www.collin.edu/aboutus/strategic_goals.html

Requested points to address, but not limited to:

- *What evidence is there to support assertions made regarding how the Service Unit relates to the Mission, Core Values and Strategic Plan?*
- *Analyze the evidence you provide. What does it show about the Service Unit?*

Our office is student centered and we work hard to get student financial aid established for each applicant so students can focus on their studies in the classroom and not on the financial aid piece. If a student is stressed by their financial situation then it is hard for them to focus on the thing that really brought them here. Providing prompt service is critical to making our students feel welcomed and comfortable. For

many students, their journey to higher education begins with a visit to the Financial Aid Office. Without financial assistance, many of our students would not be able to consider higher education, but for many students we make higher education a real possibility. Our ability to set a student at ease from a financial prospective is important to their decision to come to Collin and to persist in their educational endeavors.

In our training sessions we focus on three core values in regards to serving our students. The training session feature role playing, videos and discussions that center around customer service at other successful institutions and businesses. Treating our students with dignity and respect are critical to the success and satisfaction of our students. We have seen tremendous improvement in our internal student surveys that are conducted for students that sign into Qless (CougarQ). After an intense emphasis on customer service in 2016, we have seen tremendous improvement in every category of our student surveys with a 5% increase from 2015-2016 to 2016-2017. Integrity is also critical to the success of our department and the college. Complying with federal and state regulations and doing the right thing by the student must be handled with a high degree of integrity and diligence. In Financial Aid we have a passion for learning and that unfolds in two ways. First of all, we want to learn everything that we possibly can and provide training opportunities for all of our staff that will equip them with the knowledge and ability to serve our students in an exceptional manner. We provide eight department wide trainings per year on various financial aid topics and all staff completes a comprehensive annual training once per year. Second, we have a passion for our students to be turned on to learning.

Our department is focused on the following strategic initiatives:

1. Increase outreach – During the 2015-2016 school year we conducted 33 presentations at local high schools and in class rooms. During the 2016-2017 year. That number rose to 90 in 2016-2017 and is at 84 and counting for the 2017-2018 academic year. In 2016 and 2017 we conducted a financial aid workshop for local high school counselors and have committed to making it an annual event. Financial aid staff members have also conducted an open financial aid night at each of our campuses for all students and parents. Regardless of where they are going to college, we educate them on federal, state and scholarship aid that is available and assist them with the application process.

2. Create an increasingly welcoming environment for students, community members, faculty and staff. Customer service has been a strong focus over the past three years. In 2016 our annual retreat focused on customer service and we began providing monthly feedback to our employees from the student surveys that administered to students that sign into Qless (the queuing software utilized by all of our campuses). We have seen improvement in our customer service from these surveys over the past two years. In addition, we have seen very good improvement from the Collin College Service Unit Survey Reports. The Spring 2017 data shows a typical increase of 6% to 7% from 2014 to 2017 and an increase of 10% over the Spring 2012 survey.

	Spring 2012	Fall 2014	Spring 2017
Hours Available	4.11	4.15	4.36
Timely Service	3.92	4.00	4.34
Courteous Staff	4.06	4.18	4.46
Knowledgeable Staff	4.07	4.22	4.48
Overall Satisfaction	3.91	4.05	4.32

One other piece of data that is extremely significant is the number of negative vs. positive comments on the three surveys. About 86% of the comments were negative in 2012, 76% negative in 2014 and only 45% were negative in 2017. This data points to a great improvement in servicing our students.

	Spring 2012	Fall 2014	Spring 2017
Positive Comments	13	15	21
Negative Comments	80	47	17

3. WHY DO WE DO THE THINGS WE DO?

A. Make a case with evidence to show that the <u>primary</u> functions/services of the unit are necessary as they are, or they should be modified, or eliminated.

Requested points to address, but not limited to:

- *What is the purpose and reason for the service?*
- *How has the function evolved during the 5-year cycle? How have the reasons for the service changed over time?*
- *What would happen if the unit no longer provided these services and/or the services were outsourced?*
- *What unit services require the most resources including staff time? Which services add the biggest value to the college? Discuss any discrepancies between the services named in these two questions.*
- *What are the interdependencies with other unit services and other units of the college? Is the unit duplicating any services with other units?*
- *Is there a clear line of communication with other units involved in or supporting each of these services?*
- *Does the unit or the college have alternate ways of providing any of these services?*
- *Are the services offered/conducted as efficiently as possible?*

Our service centers around helping to provide financial aid based on student need and eligibility. The cost of higher education is so much more than just tuition and fees. Our ability to find grants, scholarships and even loans for our students results in students being able to afford College.

The last five years has actually seen a significant decrease in the amount of aid available to students. This has occurred with the limit of federal Pell grants to 6 years and the restriction of subsidized student loans. Major regulatory changes have occurred in the areas of Satisfactory Academic Progress, Verification and the application process, which has limited the availability of aid for some students. Transparency and accountability requirements continue to grow with new reporting required for gainful employment programs, student loan monitoring and degree plan evaluations. While most state aid has remained static, we have seen a surge in new regulations over the past 5 years.

If the Financial Aid department did not exist there would no doubt be many students that would not be able to attend Collin or would struggle to complete their education. While it is difficult to out-source the entire department, there are aspects of our department that have been outsourced over the last five years. Verification, the process by which tax information and other reported FAFSA data is verified against the federal financial aid application, was outsourced in 2012-2013 and has proven to be a successful move as we have seen a decrease in the amount of time it takes a student to go through the verification process. Prior to 2012-2013 it was taking over 12 business days to verify a student file due to the volume of students in verification. Today the average time is 4.5 days. This change has allowed our staff to be more student-focused instead of being behind closed doors processing documents. The in-person interaction with our students is important for their success and outsourcing this time consuming and labor intensive process has been good for our students. The current process allows students to submit documents electronically where previously they had to turn in paper documents to our office. The process has certainly been streamlined and allows a student to conduct business without having to come to campus.

Our front counter interactions require the most resources. Those interactions are very time consuming and require a high level of knowledge to thoroughly review the application and inform the student of the various requirements and pitfalls. This interaction also adds the most value to the College in that it gives staff an opportunity to instruct and assist the student in completing the process all the way to the award and receipt of funds. The regulatory requirements of federal and state financial aid can make the process very intimidating for our students. Our front-counter staff serves the very vital roles of recruiter and retention specialist by assisting the student with their financial resources. The financial aid process involves so much more than just the front counter experience. While we saw 27,369 students during the last calendar year, we also received 39,377 phone calls this past year and we processed 26,590 documents for students during the 2016-2017. Our third-party verification company reviewed approximately 37,000 documents in the same time period. We certainly do feel needed by the students. We believe that a student who has finances in order is free to focus on their education and that is what we want to see happen for our students. It takes a lot of navigation to make things happen for our students.

Financial aid works with all of the Student Enrollment Services offices including Admission, Advising and Testing to assist students in completing the admission and advising process. We refer students as needed and provide computer assistance with the admission application process. We also work closely with the Bursars Office to serve the financial needs of the students. A payment plan may be a great alternative to taking out a student loan. We also work closely with the Bursar to make sure that student refunds are processed as efficiently as possible. It is important that these services are coordinated in order to serve the student holistically. If one part of the equation is missing or delayed, the result is a bad experience for the student. There is not a duplication of effort, but rather a well-orchestrated effort to prepare the student for the classroom. There are clear lines of communication open to us in all of these service areas. The coordination of our efforts is important to the overall success of the student. Each campus manger has good working relationships with their counterparts in the other service departments and the Director of Financial Aid and Veterans Services works with the various Vice-Presidents and Deans to develop policies and practices that eliminate student barriers and reduce the amount of bouncing from department to department. One example of this is our collaboration to have the mini summer sessions combined into one summer term. This was a huge effort and one that smoothed out so many difficulties for students from the financial aid process to the admission process to the payment process. The individual sessions presented so many complications that were immediately fixe d by going to one summer Banner term.

There are no practical alternatives to delivering these services and in fact federal regulations requires internal controls that prevent other departments from carrying out multiple functions such as processing an award for a student and then being able to refund the student or being able to admit a student, process their aid and enroll them in courses. While the importance of maintaining internal control is very evident, the importance of working with all of our colleagues to streamline our processes and for all of us to work for the common good of our students cannot be overstated. Partnerships between departments are critical in order for the student to be successful.

We are continually looking for ways to gain additional efficiencies in the financial aid process. In the 2013-2014 we completely reworked our Satisfactory Academic Progress policy and worked to find smarter ways to improve the wait time for the appeal process. This past year we took the process another step forward by creating a workflow that streamlines the appeal process to the committee. Employee training has been critical to our ability to serve the student more efficiently, which has resulted in greater student satisfaction as shown by the student surveys. This past July our Financial Aid Leadership team met and identified over 20 different items that we can address this coming year to improve our service to students. One area identified as an opportunity for improvement to our customer service is to have the right employee skill set requirements for our positions. We would like to have more of our employees assigned to processing so that the advisors would be more freed up to visit with students. Our advisors are our best trained and effective employees and need to be better utilized in working with our students. A change like this would require a reclassification of our front-line staff to more closely align the required skillsets with the job descriptions. Replacing Financial Aid Specialists with Financial Aid Advisors would provide a higher quality service and a more comprehensive service for our students.

B. Benchmarking: Review two or three comparable, colleges for the way they accomplish these services. Discuss what was learned and what new ideas for service improvement were gained.

One of the schools that we choose to review was the Houston Community College and San Jacinto Community System. One of the things that was interesting with HCC was their cross training program that paired back-office employees with front-line customer service employees. The result was a better understanding of how back-office processing impacted the front counter and how front counter processing helped the back-office. While we have done some cross-training, we need to make a bigger effort to show all of our employees how critical their specific job is to the whole and to engage employees in learning the entire process, not just the piece they may be responsible for maintaining.

With San Jacinto we were intrigued with the pilot of a program called "Financial Aid Like a Paycheck" where students received their financial aid on a monthly basis. The intent was to help student manage their funds throughout the semester. One of the problems that we see is a student running short on money during the semester and then having to get a job that interferes with their education. The program was well received by many students with some even asking to be added to the pilot program. However, many students were upset with change and the media got involved. San Jacinto sees the overall effort as effective for their students. They have seen their return to title IV payments cut by 50% based on a presentation given at TASFAA in 2016. In the current reauthorization of the Higher Education Act one of the proposals is for financial aid to be paid like a paycheck. We will continue to watch and study the full implementation of the program at San Jacinto to see how we want to approach this idea.

4. HOW DO WE IMPACT STUDENT OUTCOMES?

Make a case with evidence to show effects of the service unit on student outcomes.

Requested points to address, but not limited to:

- *How does the service unit influence the student experience?*
- *How does the service unit influence the student environment and/or safety?*
- *In what way does the service unit influence student retention, persistence, and/or completion?*
- *Analyze the evidence you provide. What does it show about the Service Unit?*

Financial Aid has a positive impact on the lives of our students. As was mentioned previously, the cost of higher education is more than tuition and books. We are often helping a student pay for housing and food. The ability for our students to *live* while going to school is

important. We help many students live in an environment that is safe by providing grant and loan funds to assist them with housing. We often have students come to us with their life issues and we work to them find the resources they need to be successful.

Financial resources are required in order for a student to attend Collin. Students without those resource would either not be able come or would come then not be able to afford to finish. Students also have the ability to speed up the process if they could only afford to go part-time, but financial assistance would allow them to be full-time.

Section II. Are We Doing Things Right?

5. HOW EFFECTIVELY DO WE COMMUNICATE AND HOW DO WE KNOW?

A. Make a case that the printed literature and electronic communication are current, provide an accurate representation, and support the college's recruitment, retention and completion plans.

Requested points to address, but not limited to:

- *Demonstrate how the unit solicits student feedback regarding its website and literature and how it incorporates that feedback to make improvements.*
- *Designate who is responsible for monitoring and maintaining the unit's website, and describe processes in place to ensure that information is current, accurate, relevant, and available.*

A lot of improvements to our website are based on student input. Financial Aid employees are encouraged to share instances where students are getting confused so that we can implement strategies to improve our products and services. This has particularly happened within CougarWeb. Our student assistants and employees with children going to other schools have compared our portal with that of other schools and have given us feedback. One major item that was developed two years ago based on feedback was a financial aid checklist that shows a student every step in the financial aid process and which items need additional work. Our website is reviewed on an annual basis with the build of our new aid year to update for regulatory changes and new procedures that are implemented. Our brochures are also updated annually as we work to start a new aid year. Financial aid processing begins 11 months before the start of a new academic year requiring a review of changes occurring in the coming year almost a year in advance.

This past year we enhanced our web presence by purchasing a service called FATV. This service gives us access to over 600 1-2 minute videos that address everything from the application process to setting up direct deposit for refunds. We have also

added a product call Get Counseling that provides Satisfactory Academic Progress counseling and financial literacy counseling that is interactive and available 24 hours a day.
We have created a comprehensive set of e-mails that are automatically sent to students when various conditions are met. These communications give specific instructions to students instead of expecting students to find the data on our website.

B. Provide unit website URLs. If no website is available, describe plans for creation of website or explain the absence.

The following are links to the Financial Aid website on Collin.edu informing students of the various topics related to financial aid.
http://www.collin.edu/gettingstarted/financialaid/ - Explains when to apply for financial aid, the location information for each of the three main campus financial aid offices, and information on the work study program.
http://www.collin.edu/gettingstarted/financialaid/aboutus.html - Lists contact information (specific staff members' email addresses) as well as office hours and office locations, including the CHEC.
http://www.collin.edu/gettingstarted/financialaid/applyingforaid.html - walks students step by step through the process of applying for financial aid. Topics covered include eligibility requirements, understanding the EFC (Expected Family Contribution), the process of verification, priority deadlines, following up with the school, the Cost of Attendance (COA), books and supplies, what financial aid will pay for, census date, and how mini-sessions (express classes) effect financial aid.
http://www.collin.edu/gettingstarted/financialaid/coa.html - explains the components of the cost of attendance as well as the school's current COA.
http://www.collin.edu/gettingstarted/financialaid/typesofaid.html - explains the various types of aid available to students at Collin College and links to individual pages that go into more detail about each of the programs (grants, loans and federal work study).
http://www.collin.edu/gettingstarted/financialaid/eligibility.aspx - explains the specific eligibility requirements to receive financial aid. Contains many links to specific government, college or other organizations that explain each one in more detail.

http://www.collin.edu/gettingstarted/financialaid/SAP.html - Details the specific academic progress requirements (SAP – Satisfactory Academic Progress) to maintain eligibility for aid. Also explains the appeals process for students who are not meeting SAP.
http://www.collin.edu/gettingstarted/financialaid/returntitleiv.html - Explains the Return to Title IV (aka R2T4) process to students including the definition of "complete withdrawal" both official and unofficial as well as the repayment options.
http://www.collin.edu/gettingstarted/financialaid/finaidpolicies.aspx - Lists the official Collin College Financial Aid Policies as required by the Department of Education. Links to a separate page explaining each of the policies in depth. Includes Title IV Eligibility, Verification, Resolving ISIR (C Flag) comments, special circumstances, satisfactory academic progress (SAP), Return of Title IV (R2T4), Awarding (aid), Cost of Attendance (COA) and student responsibilities.
http://www.collin.edu/gettingstarted/financialaid/forms.html - links to various financial aid forms a student may need to submit.
http://www.collin.edu/gettingstarted/financialaid/financialaidcalendar.html - the current academic year's financial aid calendar; lists specific/important dates such as the priority deadline, census date, disbursement dates, etc.
http://www.collin.edu/gettingstarted/financialaid/FrequentlyAskedQuestions.html - a list of Frequently Asked Questions and the answers.
http://www.collin.edu/gettingstarted/financialaid/additionallinks.html - Links to important financial aid websites such as the Net Price Calculator, the Direct Lending loan site and entrance/exit counseling, IRS information about the Education Tax Credits available to students, NSLDS (National Student Loan Data System), Selective Service, Income-Based loan repayment and a PowerPoint presentation entitled "Beyond High School".
http://www.collin.edu/gettingstarted/financialaid/scholarships.html - A list of both college and external scholarship sources.
http://www.collin.edu/gettingstarted/financialaid/responsibleloan.html - Links to important information about "Responsible Loan Borrowing".

http://www.collin.edu/gettingstarted/financialaid/consumerinformation.html - Links to the information considered "consumer information" required by the Department of Education to be available to students and the public. Topics include the types of aid available, policies, how to apply for aid, R2T4, SAP, entrance and exit loan counseling, private education loans, median loan debt, net price calculator, estimated COA, and the code of conduct for Title IV loans. This section also includes helpful financial aid videos about the financial aid process and responsible borrowing. Finally, this section includes some general information such as Equal Employment Opportunity, Services and Facilities to Students with Disabilities, Academic Programs, Refunds, Copyright Infringement, and so forth. Lastly, this section includes the Annual Security and Fire Safety Report information as required under the Jeanne Clery Act.
http://www.collin.edu/gettingstarted/financialaid/exemptions.aspx - Details the various State of Texas Exemption programs with links to the individual programs and includes eligibility requirements, how to apply and includes links to any necessary forms.
http://www.collin.edu/gettingstarted/financialaid/getcounseling.html - Link to the Financial Aid Counseling Center.
http://www.collin.edu/gettingstarted/financialaid/getanswers.html - A section entitled "Get Answers" provides students with links to dozens and dozens of videos explaining all aspects of financial aid.

Veterans Services Webpage Links

http://www.collin.edu/gettingstarted/veterans/ - Lists the Veterans Services location at each of the three main campuses as well as the Certifying Officials and their contact information.
http://www.collin.edu/gettingstarted/veterans/aboutus.html - States the department's purpose as well as links to the approved programs.
http://www.collin.edu/gettingstarted/veterans/gettingstarted.html - details the steps students take to apply for veterans education benefits as well as about the

process and responsibilities while attending college (to continue to receive benefits).
http://www.collin.edu/gettingstarted/veterans/satisfactoryprogress.html - explains that veteran students must maintain satisfactory academic progress in order to remain eligible and what happens when they do not. Also contains links to the academic support services available at the college and about the VA's tutorial assistance program.
http://www.collin.edu/gettingstarted/veterans/reqtsbychapter.html - Links to individual pages for each chapter with a checklist of requirements for applying for benefits.
http://www.collin.edu/gettingstarted/veterans/forms.html - links to forms the student may need to submit as well as instructions for verifying enrollment and for finding and printing out the degree plan.
http://www.collin.edu/gettingstarted/veterans/paymentfor33.html - information for Chapter 33 on paying for classes.
http://www.collin.edu/gettingstarted/veterans/pil.html - explains what a PIL is and how/when to request one.
http://www.collin.edu/gettingstarted/veterans/hazlewood.html - Details the eligibility requirements for the State of Texas Hazlewood Exemption, how to apply, how to maintain eligibility and the forms required to submit.
http://www.collin.edu/gettingstarted/veterans/links.html - Links to a variety of internal and external entities that may be important or of interest to veteran students including the VA's Educational Benefits webpage, VA forms (not college forms), the Web Automated Verification of Enrollment (WAVE) site, information about the Admission's Veterans Transition Specialist and what they can provide to students, Collin College Counseling Services and the VA's Educational and Vocational Counseling Services.

C. Describe the process used to keep all literature and electronic sites updated.

The website and all literature are reviewed annually with the setup of each new aid year and on an ongoing basis as needed. We encourage employees to identify areas of our website and on-line portal that are confusing to students. Based on our interaction with students we make changes to clarify the information that we present and to enhance the student experience. In 2016-2017we purchased a service that enables us to have over 600 online videos available for our students. These 1 – 2 minute videos explain everything from the application process, verification and all the way through getting and

maintaining a financial award package. These videos are updated as regulatory changes are made and some of the videos are year specific. A comprehensive review of our individual webpages is being conducted this year with a focus on simplifying the information that we make available to potential students.

Unit Literature Review Table

Title	Type (i.e. URLs, brochures, handouts, etc.)	Date of Last Review/Update		Responsible Party
Financial Aid – Getting Started	URL	4/01/2017	X Current X Accurate X Relevant X Available	Kerry Thompson
Financial Aid Contact Information	URL	7/15/2017	X Current X Accurate X Relevant X Available	Kerry Thompson
Free Application for Federal Student Aid (FAFSA) help page	URL	11/01/2017	X Current X Accurate X Relevant X Available	
Cost of Attendance	URL	11/01/2017	X Current X Accurate	

			X Relevant X Available	
Types of Aid	URL	07/15/2017	X Current X Accurate X Relevant X Available	
Student Eligibility	URL	5/17/2017	X Current X Accurate X Relevant X Available	
Satisfactory Academic Progress	URL	4/01/2017	X Current X Accurate X Relevant X Available	
Return to Title IV	URL	06/15/2016	X Current X Accurate X Relevant X Available	
Financial Aid Policies	URL	11/13/2016	X Current X Accurate	

			X Relevant X Available	
Student Forms	URL	4/01/2017	X Current X Accurate X Relevant X Available	
Financial Aid Calendar	URL	10/15/2017	X Current X Accurate X Relevant X Available	
Frequently Asked Questions	URL	2/01/2017	X Current X Accurate X Relevant X Available	
Return to Title IV	URL	06/15/2016	X Current X Accurate X Relevant X Available	
Scholarships	URL	2/11/2017	X Current X Accurate	

			X Relevant X Available	
Responsible Loan Borrowing	URL	3/14/2017	X Current X Accurate X Relevant X Available	
Consumer Information	URL	4/15/2017	X Current X Accurate X Relevant X Available	
Exemptions	URL	2/01/2017	X Current X Accurate X Relevant X Available	
Financial Aid Counseling	URL	06/15/2017	X Current X Accurate X Relevant X Available	
Veterans	URL	7/15/2017	X Current X Accurate	

			X Relevant X Available	
Veterans Satisfactory Academic Progress	URL	9/14/2016	X Current X Accurate X Relevant X Available	
Veterans Requirements by Chapter	URL	9/14/2016	X Current X Accurate X Relevant X Available	
Veterans Forms	URL	9/14/2016	X Current X Accurate X Relevant X Available	
Veterans Chapter 33 Payments	URL	9/14/2016	X Current X Accurate X Relevant X Available	
Veterans Parent Institution Letters	URL	2/13/2017	X Current X Accurate	

			X Relevant X Available	
Veterans Hazlewood	URL	9/01/2017	X Current X Accurate X Relevant X Available	
Veterans Links	URL	4/14/2017	X Current X Accurate X Relevant X Available	
Financial Aid Helpful Hints	Flyer	9/17/2017	X Current X Accurate X Relevant X Available	
FAFSA Flyer	Flyer	9/17/2017	X Current X Accurate X Relevant X Available	
Financial Aid Checklist	Flyer	9/17/2017	X Current X Accurate	

			X Relevant X Available	
Return to Title IV	URL	06/15/2016	X Current X Accurate X Relevant X Available	
Scholarships	URL	2/11/2017	X Current X Accurate X Relevant X Available	
Responsible Loan Borrowing	URL	3/14/2017	X Current X Accurate X Relevant X Available	

6. HOW WELL ARE WE LEVERAGING PARTNERSHIP RESOURCES AND BUILDING RELATIONSHIPS, AND HOW DO WE KNOW?

Partnership Resources: List any business, industry, government, college, university, community, and/or consultant partnerships, including internal Collin departments, to advance the service unit outcomes. If a formal agreement is involved, indicate its duration.

Partnership Resources

Partner/Organization	Description	Formal Agreement Duration, if any	Briefly explain the Partnership's Value to Service Unit
National Association of Student Financial Aid Administrators	National financial aid association	Annual membership July 1 – June 30	Provides a daily news digest regarding current legislation, regulations and interpretations of federal law. Provides resources for administering federal student aid and training.
Texas Association of Student Financial Aid Administrators	State financial aid association	Annual Membership September – August	Provides training and information regarding both federal and state issues in financial aid.
Department of Education	Federal department that oversees the administration of federal student aid	Program Participation Agreement – 5 years, expiring June 30, 2022	Provides the majority of our funding for students through multiple grant and loan programs.
Department of Veterans Affairs	Federal Department that oversees the administration of Veterans Education Benefits	No formal agreement; however, we must seek approval each year for our programs.	Partnership is required in order for our Veterans to receive education benefits.
Department of Defense	Federal department responsible for active duty tuition benefits	Memorandum of Understanding (MOU) on-going agreement	Provides tuition assistance to members of the military.
Texas Higher Education Coordinating Board	State department responsible for the administration of state aid	Memorandum of Understanding (MOU) on-going	Provides administration of state financial aid.

		agreement	
Global Financial Services	Contracted company that provides verification services	Professional services contract in place through April 2022	Provides verification services for the Free Application for Federal Student Aid
Inceptia	Contracted company that provides loan borrower information to students	Professional services contract through April 2020	Provides electronic loan information to students who have borrowed federal student loans
Western Association of Veterans Education Specialists	Veterans Organization	Annual membership	Provides training and education regarding offering Veterans Services
National Association of Veterans' Program Administrators	Veterans Organization	Annual Membership	Provides training and education regarding Veterans' programs
Ellucian	Contracted software services	Contract	Provides training and programming in order to comply with federal and state regulations and reporting.
Texas Association of Collegiate Veteran Program Officials	State Veterans organization	Annual membership	Provides training and best practices for Veterans services

7. Are we hiring qualified staff, and supporting them well with professional development, and how do we know?

Make a case with evidence that staff are qualified, keep current, and fulfill roles that advance the service unit and the college. List service unit employees (full-time and part-time), their roles, credentials, and known professional development activity in the last four years.

Employee Resources

Employee Name	Role in Unit	Credentials	Professional Development since Last Program Review**
Alan Pixley	Director	M.B.A, Bachelor Accounting	Federal Student Aid Conference NASFAA Annual Conference NAVPA Conference TACVPO Conference TASFAA Conference Ellucian Live Conference Leadership Plano THECB Financial Aid Advisory Committee TCC Conference Annual Training Workshop Internal Professional Development Series (8 sessions)
Arianna Gray	Assistant Director – Operations	Bachelor	NASFAA Core Certified Veterans Certification NASFAA Conference TASFAA Conference TACVPO Conference WAVES Conference NASFAA Leadership Training Annual Training Workshop

			Internal Professional Development Series (8 sessions)
Kerry Thompson	Assistant Director – Operations	Bachelor	Federal Student Aid Conference Ellucian Live Conference TASFAA Conference NASFAA Certifications NASFAA Leadership Training Annual Training Workshop Internal Professional Development Series (8 sessions)
Carolyn Jones	Manager – Technology	Bachelor	Ellucian Live Conference TASFAA Conference NASFAA Leadership Training NASFAA Certifications Annual Training Workshop Internal Professional Development Series (8 sessions)
Ana Chavez	Manager – Central Park Campus	Bachelor	Work Study Association NASFAA Certifications TASFAA Conference Annual Training Workshop Internal Professional Development Series (8 sessions)
Beverly Reeser	Manager – Spring Creek Campus	Masters Human Relations Bachelors Government & Politics	NASFAA Conference NASFAA Leadership Training

			NASFAA Credentialed Professional Development TASFAA Conference Annual Training Workshop Internal Professional Development Series (8 sessions)
James Leathers	Call Center Supervisor	Associates	Global Financial Services Conference Annual Training Workshop Internal Professional Development Series (8 sessions)
Amber Schmid	Technical Advisor	Masters	TASFAA Conference Annual Training Workshop Internal Professional Development Series (8 sessions)
Melisa Cotton	Technical Advisor	Bachelors Business Administration	Global Financial Services Conference TASFAA Conference NASFAA Conference NASFAA Credential Professional Judgement Annual Training Workshop Internal Professional Development Series (8 sessions)
Kristin Carpenter	Financial Aid Advisor	Bachelors of Arts Psychology	NASFAA Conference TASFAA New Aid Officer Training TASFAA Conference National Student Employment

			Association Conference Collin College Supervisor Practicum Program Annual Training Workshop Internal Professional Development Series (8 sessions)
Telisha Hinton	Financial Aid Advisor	Bachelors Business Administration	TASFAA Conference FSA Conference Annual Training Workshop Internal Professional Development Series (8 sessions)
Mary Banos	Financial Aid Advisor	Bachelors	TASFAA Conference NASFAA Conference Annual Training Workshop Internal Professional Development Series (8 sessions)
Araceli Leos-Sanchez	Financial Aid Advisor	Bachelors	TASFAA Conference Annual Training Workshop Internal Professional Development Series (8 sessions)
Lindy Henrie	Financial Aid Advisor	Bachelors	TASFAA Conference Annual Training Workshop Internal Professional Development Series (8 sessions)
Shontel Pearson	Veterans Advisor	Masters Human Services	TASFAA Conference

			Collin College Supervisor Practicum Program Federal Student Aid Conference Annual Training Workshop Internal Professional Development Series (8 sessions)
Jacqueline Grayzcyk	Veterans Advisor	Masters Strategic Leadership	TASFAA Conference TACVPO Conference WAVES Federal Student Aid Conference NASFAA Credential Application Process Annual Training Workshop Internal Professional Development Series (8 sessions)
Don Dickson	Veterans Advisor	Bachelor Computer Information Systems	New Employee
Sandra Henderson	Financial Aid Specialist		Annual Training Workshop Internal Professional Development Series (8 sessions)
Susan Karlsen	Financial Aid Specialist	Bachelor	TASFAA Conference TASFAA New Aid Officer Training Federal Student Aid Conference Annual Training Workshop Internal Professional Development Series (8 sessions)

Crystal Eberhart	Financial Aid Specialist	Bachelor	Federal Student Aid Conference Annual Training Workshop Internal Professional Development Series (8 sessions)
Mariann Grace	Financial Aid Specialist	Associate	Annual Training Workshop Internal Professional Development Series (8 sessions)
Susan Coker	Financial Aid Specialist	Bachelors Sociology	Annual Training Workshop Internal Professional Development Series (8 sessions)
Raymond Fitzgerald	Financial Aid Specialist	Associate	Annual Training Workshop Internal Professional Development Series (8 sessions)
Chris Chavez	Financial Aid Specialist	Bachelors	Annual Training Workshop Internal Professional Development Series (8 sessions)
Cindy Steltzlen	Financial Aid Specialist		New employee
Pam Minton	Veterans Services Specialist	Associate	Annual Training Workshop Internal Professional Development Series (2 sessions)

**For convenience, if providing a listing of professional development activities, this list may be included in this document as an addendum.

8. Do we support the service unit well with facilities, equipment, and their maintenance and replacement, and how do we know?

Make a case with evidence that current deficiencies or potential deficiencies related to service unit facilities, equipment, maintenance, replacement, plans, or budgets pose important barriers to the service unit or student success. As part of your response, complete the resource tables, below, to support your narrative.

Requested points to address, but not limited to:

- *The useful life of structures and equipment,*
- *Special structural requirements, and*
- *Anticipated technology changes impacting equipment sooner than usual.*
- *If you plan to include new or renovated facilities or replacement of equipment in your service unit improvement plan, be sure to justify the need in this section with qualitative and/or quantitative data evidence of the need.*
- *Analyze the evidence provided. What does it show about the Service Unit?*

Facilities Resources

Room/Office Location and Designation	Description (i.e. Special Characteristics)	Meets Needs (Y or N): Current	For Next 5 Years	Describe additional needs for any "N" answer
CHEC 313	Director Office	Y	Y	
CHEC 331	Manager Office	Y	Y	
CHEC 328	Technical Advisor Office	Y	Y	
CPC D118 (E, F, G, H)	Central Park Financial Aid Office	Y	N	Need to find a new location for Assistant Director for Compliance at CHEC to move Veterans Advisor to campus
Founders Hall (F109 C, D, E, F	Preston Ridge Financial Aid Office	Y	N	Need room for additional advisor
G 103, 117,118, 123, 124, 125	Spring Creek Financial Aid Office	Y	Y	
D213	Financial Aid Call Center – Spring Creek	Y	Y	
D200,201	Veterans Resource Center – Spring Creek	Y	Y	
XXXX	Veterans Resource Center – Preston Ridge	Y	Y	
XXXX	Veterans Resource Center – Central Park Campus	Y	Y	

Equipment ($5,000 or more)

Current Equipment Item or Budget Amount	Description	Meets Needs (Y or N): Current	For Next 5 Years	For any "N", justify needed equipment or budget change
N/A				

Financial Resources

Source of Funds (i.e. college budget, grant, etc.)	Meets Needs (Y or N): Current	For Next 5 Years	For any "N", explain why	For any "N", identify expected source of additional funds if needed
College Budget	Y	Y		
State Farm Grant	Y	N	Need more grant assistance for our Veterans Programs	Need to develop additional partnerships and make grant applications with area corporations and governmental agencies

Section III. Continuous Improvement Plan (CIP)

9. Given our present status, how do we intend to change in ways that help us advance?

Service unit review at Collin College takes place within five-year cycles. During the last (fifth) year of each cycle, the unit completes this instrument and submits its completed review to the Program Review Steering Committee. There are two two-year CIP cycles within each five-year service unit review cycle. As part of the fifth year service unit review, the unit should use the observations and data generated by this process along with data from other relevant assessment activities to develop the unit's CIP and an action plan for the first two-year CIP cycle. At the conclusion of the first two-year CIP cycle, data collected from the first cycle, plus any

other relevant data that was collected in the interim, should be used to build on the accomplishments of the first two-year CIP cycle by developing another two-year action plan for the second CIP cycle to help the service unit accomplish the expected outcomes established in its CIP.

Our greatest potential in improving our services is to be able to have the right level of expertise interacting with our students. The first-line interaction currently happens with an employee with at least an associate's degree. I see a big difference in the level of service and the thought process that occurs with employees who have bachelor degrees and higher compared with employees that have not obtained that level of education. The skill sets that are developed throughout the higher education process are very valuable to the problem solving skills, mediation and communication skills that are necessary to be a bridge between very complex regulations and the student. Our most valuable assets are the advisors and they need to be the ones that advise our students.

While our customer service has improved, we can do better. One of the hardest parts of our job is to deliver bad news to a student. Telling a student that they are no longer eligible for aid or that we have offered the maximum amount of aid that is available when the student still needs more is difficult at best. The hurdles that stand between the student and the resources they need are often frustrating and cause students to give up. We must work harder to see the student instead of seeing the regulation. Developing our customer service, communication styles and empathy will help us to provide a better experience for our students.

A redesign of our webpages needs to occur in order to make it easier to read and understand. We often let our terminology cause confusion for our students. Our goal is to have our main potential student pages updated so that they read on an 8th to 9th grade reading level. Accomplishing the rewrite of these 10 pages will help potential and current students navigate the application and award process with less stress and confusion.

All of our outreach programs should cause an increase in the number of applications that we receive. Our goal is to see an additional 3% in financial aid applications in each of the next two years.

10. HOW WILL WE EVALUATE OUR SUCCESS? Complete the Continuous Improvement Plan (CIP) tables that follow.

Within the context of the information gleaned in this review process and any other relevant data, identify program priorities for the next two years, including at least one student learning outcome, and focus on these priorities to formulate your CIP. You may also add short-term administrative, technological, assessment, resource or professional development outcomes as needed.

CIP Outcomes, Measures & Targets Table

A. Expected Outcome(s) Results expected in this program/department	**B. Measure(s)** Instrument(s)/process(es) used to measure results	**C. Target(s)** Level of success expected
Improve Qless overall satisfaction survey result	SnapSurveys.com	3%
All menu item web pages written at 8th grade reading level	Microsoft Readability Statistics	100%
Increase in the number of financial aid applications	Number of FAFSA applications received	Increased by 3% from previous year

Implementation of the action plan laid out in the CIP Cycle 1 Table will begin during the next academic year.

CIP Cycle 1 Table

Outcomes **(From Outcomes, Measures & Targets Table)** Results expected in this program/department	**Action Plan** **(Review Cycle Year 5)** Based on analysis, identify action(s) to be taken to accomplish outcome.	**Implement Action Plan** **(Review Cycle Year 1)** Implement action plan and collect data.	**Results Summary** **(Review Cycle Year 2)** Summarize collected data.	**Findings** **(Review Cycle Year 2)** What does data say about outcome(s)?
Improve Qless overall satisfaction survey result	Conduct a financial aid employee workshop on customer service Review Customer service feedback from Qless report on a monthly basis and give feedback to employees			
All menu item web pages written at 8th grade reading level	Run all identified pages through the Microsoft Readability Statistics software. Re-write pages until 8th			

Outcomes (From Outcomes, Measures & Targets Table) Results expected in this program/department	Action Plan (Review Cycle Year 5) Based on analysis, identify action(s) to be taken to accomplish outcome.	Implement Action Plan (Review Cycle Year 1) Implement action plan and collect data.	Results Summary (Review Cycle Year 2) Summarize collected data.	Findings (Review Cycle Year 2) What does data say about outcome(s)?
	grade reading level is achieved.			
Increase in the number of financial aid applications	Promote FAFSA application completion in each school. Send an e-mail to every new Collin College student regarding financial aid resources that may be available to them.			

Development of a CIP Cycle 2 action plan in the following table will occur at the end of the CIP 1 Cycle and implantation will begin during the third year of the program review cycle.

CIP Cycle 2 Table

Outcomes (May come from CIP Cycle 1 Table or from the Outcomes, Measures & Targets Table if it includes any expected outcomes that were not address during CIP Cycle 1) Results expected in this program/department	Adapt Action Plan (Review Cycle Year 2) Based on analysis, identify new action(s) or adapt prior actions to accomplish outcome.	Implement Action Plan (Review Cycle Year 3) Implement new or adapted action plan and collect data	Results Summary (Review cycle Year 4) Summarize collected data.	Findings (Review Cycle Year 4) What does data say about outcome?

Outcomes **(May come from CIP Cycle 1 Table or from the Outcomes, Measures & Targets Table if it includes any expected outcomes that were not address during CIP Cycle 1)** Results expected in this program/department	**Adapt Action Plan** **(Review Cycle Year 2)** Based on analysis, identify new action(s) or adapt prior actions to accomplish outcome.	**Implement Action Plan** **(Review Cycle Year 3)** Implement new or adapted action plan and collect data	**Results Summary** **(Review cycle Year 4)** Summarize collected data.	**Findings** **(Review Cycle Year 4)** What does data say about outcome?

11. How do our Improvement plans impact the budget?

A. What additional funding beyond the unit's base budget is needed to implement your Continuous Improvement Plan?

Briefly describe steps your department will take to secure these funds.

All of these improvements can be made with no minimal resources that can be absorbed within the current budget.

B. With these additional funds, please explain how funds will be used to improve student learning or other program outcomes.

See possible examples below:

- *Increase and retain enrollment*
- *Increase completers*
- *Develop resources*
- *Update facilities*
- *Expand service opportunities*
- *Partner to increase post-graduation employment opportunities*
- *Increase transfers to related baccalaureate institutions*
- *Increase effectiveness and/or efficiency*
- *Improve student performance levels*
- *Expand or transform services*
- *Anything else? Briefly describe.*

What happens next? The Program Review Report Pathway

A. Following approval by the Steering Committee,

- Program Review Reports will be evaluated by the Leadership Team
- After Leadership Team Review, the reports will be posted on the intranet prior to Fall semester.
- At any point prior to Intranet posting, reports may be sent back for additional development by the department.

B. Unit responses to the Program Review Steering Committee recommendations received by August 1st will be posted with the Program Review Report.

C. Leadership Team members will work with program supervisors to incorporate Program Review findings into planning and activity changes during the next five years.