Data Collection Process Re-Engineering & Training
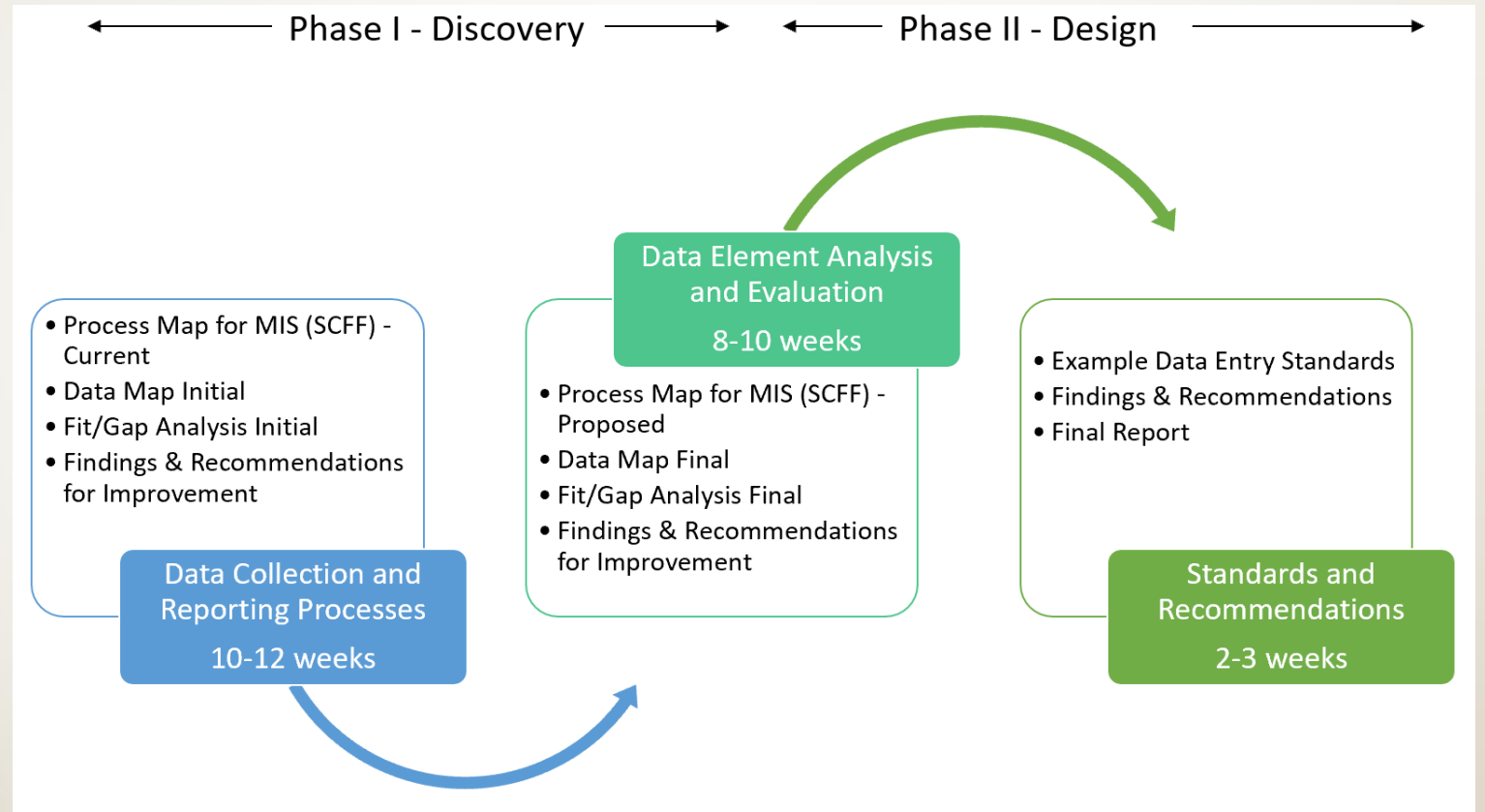
Presented by Cambridge West Partnership, LLC

# A Little History – the Data Integrity Project

Phase I - Discovery → ← Phase II - Design

Data Collection and Reporting Processes
10-12 weeks
- Process Map for MIS (SCFF) - Current
- Data Map Initial
- Fit/Gap Analysis Initial
- Findings & Recommendations for Improvement

Data Element Analysis and Evaluation
8-10 weeks
- Process Map for MIS (SCFF) - Proposed
- Data Map Final
- Fit/Gap Analysis Final
- Findings & Recommendations for Improvement

Standards and Recommendations
2-3 weeks
- Example Data Entry Standards
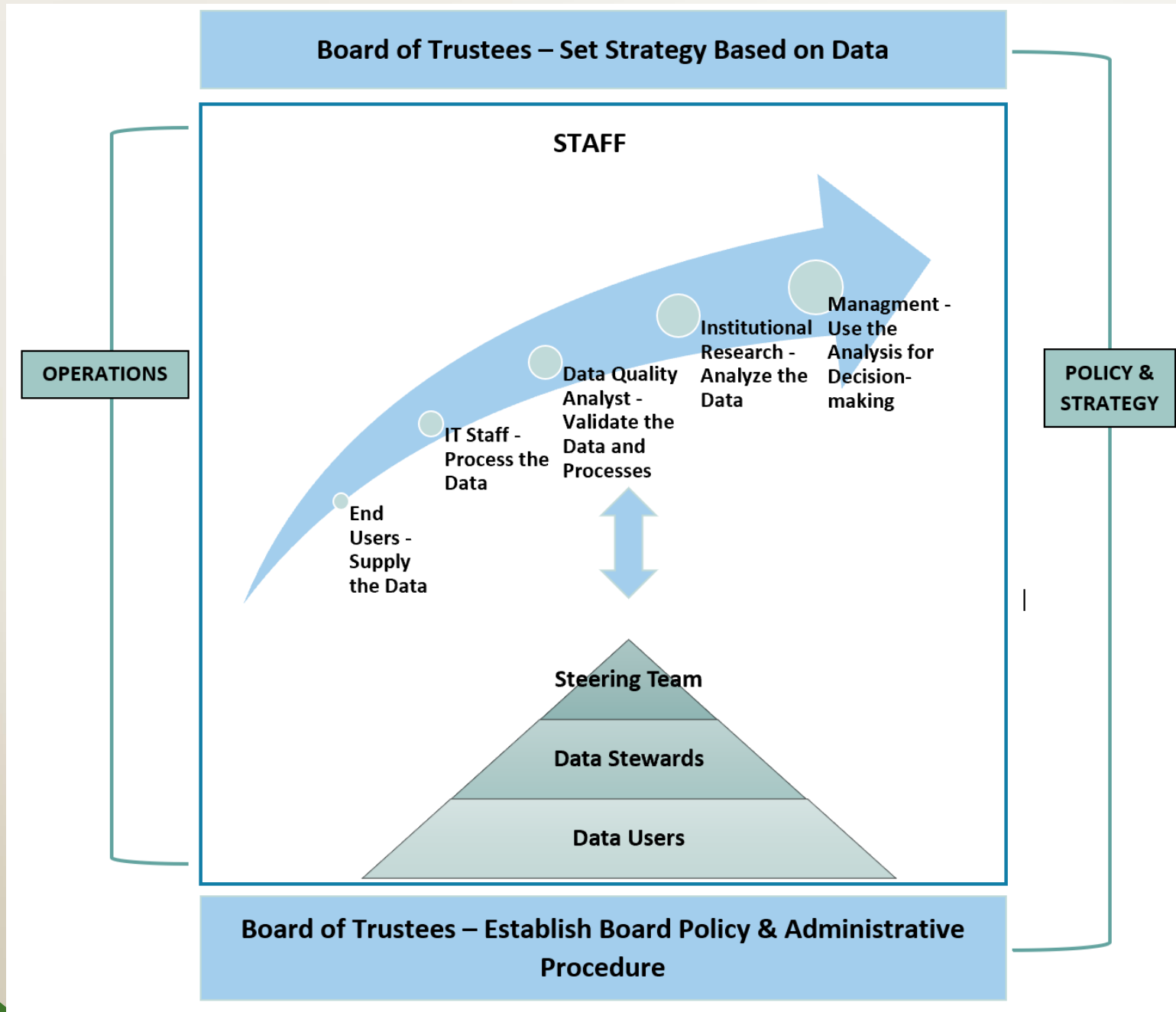- Findings & Recommendations
- Final Report

Interviewed **100+ Staff** in **13+ Departments**; Resulted in **12 Gaps, 28 Departmental Recommendations**

Data Reviewed during the Data Integrity Project
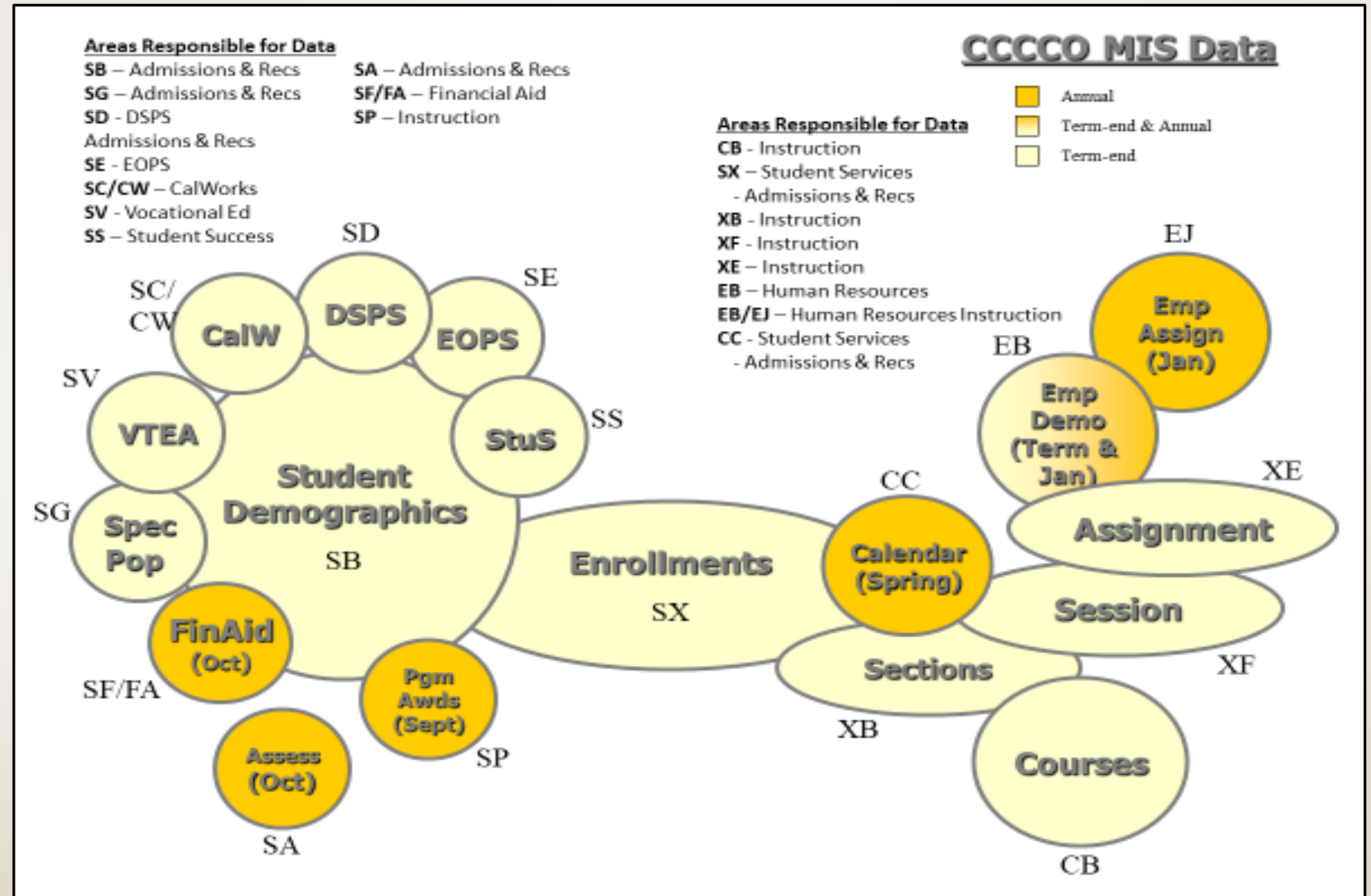
Role of the Board & Staff in Data Integrity

Data Collection Process Re-Engineering & Training Project

- Review with appropriate staff the findings and recommendations from Data Integrity Project
- Revise process and data maps as warranted based on re-engineering outcomes
- Develop training materials/presentations for a training session for each area including training on use of the documents, data input requirements and impact/outcomes of the processes
- Conduct 4-hour training sessions (face-to-face or online) for each of the areas

Role of the Steering Team

Guide the project to completion

Help to ensure that resources are available when needed to complete the project

Provide feedback on the effectiveness of the process

Act as advocates for the process and report out to others in the institution regarding the progress, gaps, findings and recommendations
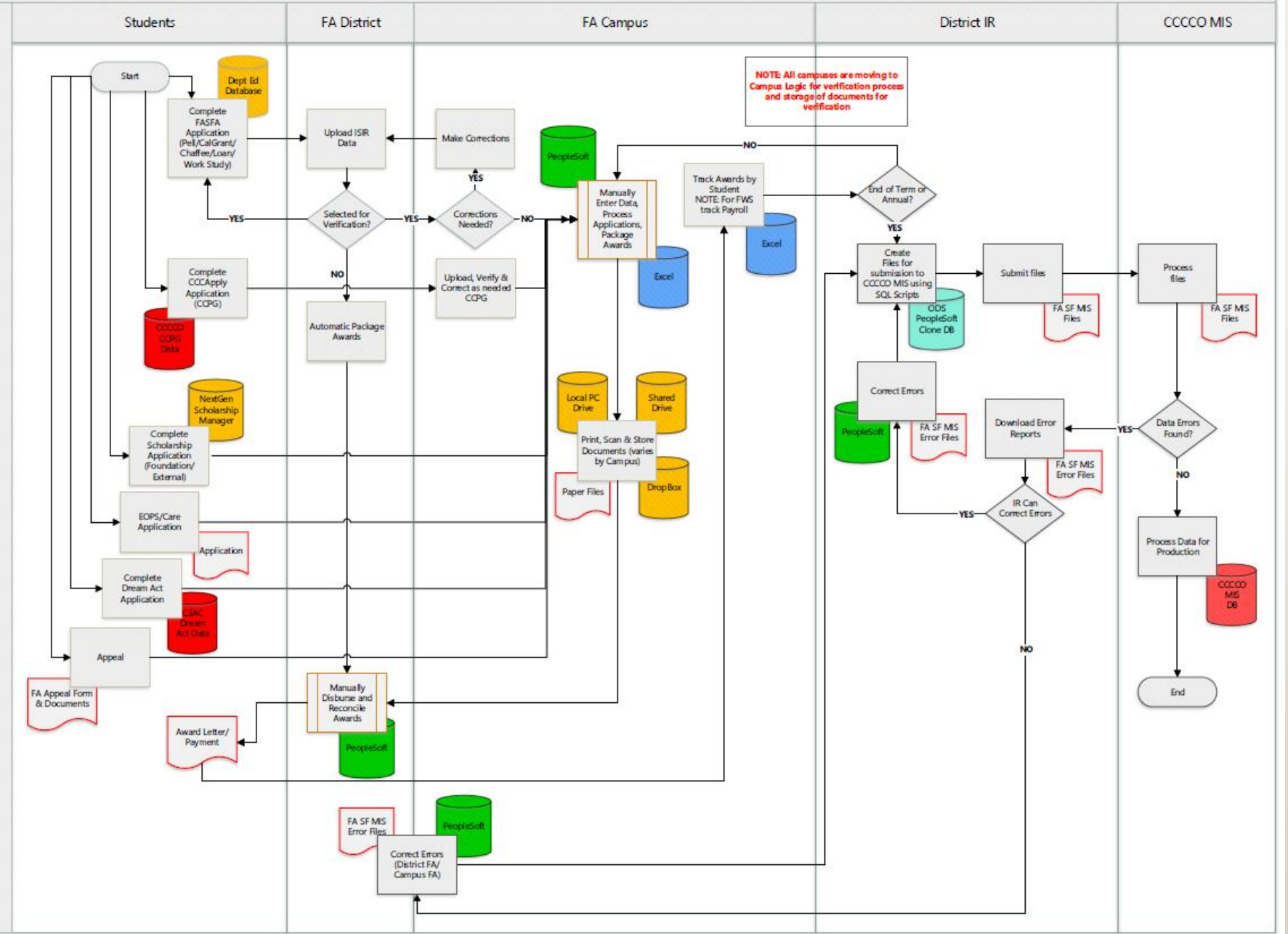
Carry on the work to address the gaps and recommendations

CW/P

Review Current Process

Review Data Dictionary/Map

Review List of Recommendations

FINANCIAL AID		
Recommendation	**Target Completion**	**Status**
Report all student who enroll and whose drop date if after the first class meeting For Pell, report Summer as a trailer For Promise, report Summer as a header Implement sync process for creation of fee waiver at each campus; consult Los Rios CCD for their process Report all $0 promise grants up to 7% of total reported (see Gap Recommendation 1)		
Continue the implementation of CampusLogic consistently District-wide with the ability to share information; setup the storage of documents uniformly for easy access by all Financial Aid departments to better and more consistently serve students		
Hire a consultant twice a year (or more if needed) who is familiar with PeopleSoft to train staff on performing aid year and semester setup, review system setup and validate processing will be done properly (see Gap Recommendation 1)		
Develop roles and responsibilities for each department and clearly communicate this to staff and students to avoid confusion and double work (see Gap Recommendation 4)		
Develop online Financial Aid forms that directly interface with PeopleSoft (see Recommendation 11)		
Select and implement a digital imaging system for all document storage (See Gap Recommendation 6 & 11)		

Project Plan Draft

6 Weeks	Steering Committee & VTEA Re-Engineering/Training	Approximate Dates	Status	Approximate Timeline					
				November				December	
				8-11	15-18	22-24	29-2	6-9	13-16
1	Review of Financial Aid Re-engineering & Steering Team Update	Nov 8-11							
2	VTEA Preparation	Nov 15-18							
3	VTEA Re-engineering meeting	Nov 22-24							
4-5	VTEA Process Flow/Data Dictionary/Map & Recommendations List Updated; Training Materials Developed	Nov 29 - Dec 9							
6	Training	Dec 13-16							

Products	• Revised VTEA Process Flow to be Implemented
	• Updated Data Dictionary/Map for VTEA
	• Updated VTEA Recommendation List Assignments/Timeline
	• VTEA Training Materials

Notes	Holidays excluded Nov 25 - 26
	Light blue highlighted areas require District/College staff participation: other items are consultant only

Project Plan Draft

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Project Plan Draft

- ❖ **Conduct Financial Aid re-Engineering meeting**
  - ❖ Validate processes
  - ❖ Review recommendations
- ❖ **Update documents**
- ❖ **Develop and conduct training session**
- ❖ **Review process and refine**
- ❖ **Continue for all areas – VTEA and Special Populations are next**

Where Do We Go From Here?

CW/P

Discussion & Questions