

# The Higher Learning Commission Action Project Directory

## Colorado Mountain College

Project Details			
<b>Title</b>	Improving College Processes	<b>Status</b>	COMPLETED
<b>Category</b>	8-Planning Continuous Improvement	<b>Updated</b>	09-29-2014
<b>Timeline</b>		<b>Reviewed</b>	10-06-2014
<b>Planned Project Kickoff</b>	02-04-2014	<b>Created</b>	04-22-2014
<b>Actual Completion</b>	02-17-2015	<b>Version</b>	1

### 1: PROJECT GOAL

- A:** The Systems Appraisal, and supported by findings in the Gap Analysis, the BrandJuice Study, and an Elucian assessment, indicate the need to address streamlining core functional processes and minimizing barriers to student access and success. In addition, processes that indirectly impact students and have been identified in various assessments, reports, and AQIP Portfolio feedback will also be addressed including but not limited to faculty credentialing process, adjunct workload, and strategic use of data.

### 2: REASON FOR UNDERTAKING THIS PROJECT

- A:** Based on various reports and assessments, CMC has a basic lack, in some areas, of systemic and systematic approaches. By focusing attention and resources on streamlining core functional processes, the opportunity to profoundly impact increased student access and success; and, excel in customer service and quality education, is exciting and compelling.

### 3: ORGANIZATIONAL AREAS AFFECTED

- A:**
- Students (affected)
  - Community members (affected)
  - All employees (involved)
  - Board of Trustees (approve processes, if necessary)
  - College President (involved)
  - "Owners" of various processes (involved)

With successful completion of this project all internal and external stakeholders will be impacted in some way.

### 4: KEY ORGANIZATIONAL PROCESSES

- A:** To enhance, streamline and standardize systems and communications that remove barriers to admission, enrollment, success, and quality; and, is measured, documented, and systematically reviewed; and, includes enhanced and regular training and refresher training.

### 5: PROJECT TIMEFRAME RATIONALE

- A:** Each process will have varying costs ranging from \$0 additional dollars for human resources to \$250,000 for automating processes and related one-time personnel costs.
- Early February 2014: Team and meeting dates established
  - Late February 2014: Processes prioritized, top few are selected for action and measures of success and timelines are identified.
  - March 2014: Teams map and measure current process(es)
  - April 2014: Teams streamline process and/or propose necessary changes and costs needed.
  - May 2014: New process training occurs, post measurements occur.
  - June 2014: Results communicated to leadership, documented in TaskStream, website, publications and Systems Portfolio. Process for engrafting training and auditing the process are established and documented.
  - July 2014: Next prioritized processes identified and cycle begins again.

### 6: PROJECT SUCCESS MONITORING

- A:**
- Regular communication with Team(s) and College Council.
  - Timelines will be created per process
  - Team leaders will be assigned based on the process under review.

## 7: PROJECT OUTCOME MEASURES

A: Key assumptions this project is based upon -

- Functional area leaders and the “process owners” have invaluable expertise and will be included on the teams and will be vested in improving processes not only for student benefit, but for staff benefit as well.
- That human resources will not be unduly strained by limiting the number of processes addressed at one time and limiting staff to one team at a time.
- Team’s actions and decisions will be vetted to College Council and other leadership teams before implementation.

## Project Update

### 1: CURRENT PROJECT STATUS SUMMARY

A: The project is in progress. It originated on April 22, 2014 with a projected end date of July 1, 2015.

In order to develop a perpetual systematic review and streamlining of systems/processes, a flow chart, checklist and rating form were developed describing the steps to identify and prioritize process-improvement action initiatives. Using this process, the top two processes easily identified for action were: Financial Aid Engagement, post-application; and, Admissions Engagement, post-application.

It is important to note that the focus on improved processes has expanded dramatically starting in April, 2014 when a proposal and subsequent approval were achieved to move on significant technology upgrades (ERP - integrated information system upgrades) which we are just launching parallel to the above two action teams. The College is investing significant resources to bring CMC up to current technologies which have not been upgraded since 2005. This intense focus on technology upgrade and automation is expected to last three years and is expected to profoundly impact the improvement of College Processes which will be quantified. In addition to the Information System upgrades, we are currently in the process of automating internal systems that have previously relied heavily on manual processing. The first achievement was the recent launch of automated transcript request processing that significantly reduces the human resources hours and a dramatic reduction of the turnaround time to fulfill requests. This is quantifiable and will be provided in the next update report since this just launched mid-September. One final note, given the recognition of the need to upgrade our technology, the Student Affairs division was approved for and hired a Registrar’s Systems Specialist position that focuses entirely on learning the current manual processes and then automating these processes within our existing ERP solution set or finding an automation solution.

With the addition of the technology upgrades and automation, this project relates to CMC Strategic Goals:

A2-Ensure student support services and student life are adequate across CMC.

A3-Create student-friendly, seamless systems.

B2- Develop a clear plan for Continuing Education, including resource allocation.

C1-Optimize enrollments

C3-Ensure the IT infrastructure meets current and projected CMC needs.

E1-Ensure consistency in procedures and systems across CMC.

E2-Improve internal and external CMC communications.

### 2: ORIGINAL PROJECT GOALS AND DELIVERABLES

A: To enhance, streamline and standardize systems and communications that remove barriers to admission, enrollment, success, and a quality learning experience; and, is measured, documented, and systematically reviewed; and, includes enhanced and regular training and refresher training.

The project itself is to be systematic and restrained from addressing every process at the same time. The processes will be prioritized based on a rating form focused on the most impact to student access, student success and accreditation. Once a process has been fully addressed, measured, documented; and, training & auditing has been engrafted, the team will move to the next process to be addressed.

The metrics/measures will vary per sub-action team but include:

- reduction in turn-around time in student service
- reduction in human resource hours by providing online self-services
- increased standardization and consistency of processes across campuses
- increased standardization, consistency and quality of communications to students college-wide
- increased training, retraining, and quality of processes
- increased # of financial aid applicants
- increased # of admissions applications

- web-page Google analytics (page views, time per page)
- centralized documentation of processes accessible by all college-wide

### 3: ACCOMPLISHMENTS OVER THE PAST YEAR

**A: The Financial Aid Action Team** selected and prioritized 7 key action items to fulfill the Taskforce charge to: "Create and/or define a standardized process for engaging post-application students in the financial aid process." The 7 key items nearing implementation are:

1. Implement Elucian's Financial Aid HUB (available March, 2015). This is a one-stop, comprehensive, web-based portal whereby students can access and interact with for all things financial aid related. This will even be accessible via a student's smart phone. Of all of the 7 action items, the Financial Aid (FA) HUB will do more to automate and refine the process whereby students are notified and interact with CMC regarding financial aid matters.
1. Embed the Financial Aid TV videos in our financial aid home page. As opposed to the voluminous pages, layers and links students currently rarely use, (according to recent Google analytics) FA TV condenses, optimizes and communicates vital information via videos, rather than page after page of written information. The team is currently reviewing topics, discussing implementation timeframes, cost and Information Technology support requirements.
1. Post-application outreach- by determining the number of students who have applied for admission to CMC but have not filed a Free Application for Federal Student Aid (FAFSA) the Action team is developing contact strategies to inform students of the benefits of applying for financial aid. FATV, use of QR codes on business cards, mailings and email correspondence will provide step by step instructions on how to complete the FAFSA.
1. Expanded Q & A access for homepage in FATV format and/or written text. By our survey of the most commonly asked questions, we have built a robust Q & A section that students and/or parents can access to get answers to commonly asked financial aid questions 24/7.
1. Expand FA Query Training to front line staff. We have started to train and grant account managers and several counselors query access to basic financial aid screens in Elucian. This has helped front line and account managers see basic outstanding requirements students may have. While no hard measurements have yet been calculated, we have received positive feedback from front line staff that phone calls and other inquiries to the financial aid office were addressed due to the new training, thereby freeing office staff to address other financial aid needs.
1. Expand College Goal Sunday. Last year's event was very successful for CMC. The Action Team is adding staff, increasing the web presence of the event and increasing marketing efforts to better promote it this coming year.
1. Establish a social media presence through Facebook. The College has been working on links and other avenues to establish a presence for the financial aid home page and other possible CMC connections to better communicate to students at their level. Social media will play a significant role in engaging post-application students in the financial aid process.

As this task force is 7 months old and the action items above have not been launched, no quantifiable results are available at this time.

**The Admissions Engagement Action Team** began in May met through mid-July. The taskforce began with a review of communications strategies at each campus. Through this review the inconsistencies in our communications with applicants was highlighted and discussed. After a thorough review we began to explore strategies being employed by other colleges and universities.

In mid-July we had our second face-to-face all day meeting where we created and organized an outline of a yearlong communications track to a high school applicant. This outline includes communications that will come from Central Services and the Campuses. By incorporating communications from both we can centralize generic communications that every student needs and allow the campuses to focus on communications that highlight their individual attributes.

The next meeting will cover how we want to create these communications and a timeline for implementation. We will also discuss who on each campus should own the development of these individualized communications and the hiring of a writer to assist in the creation of our communications tracks.

### 4: INSTITUTIONAL INVOLVEMENT

**A: The Financial AQIP Action Team** has a targeted charge as cited earlier. This charge primarily involves financial aid, business office, marketing and CMC counselor personnel to fulfill its task. These members, while financial aid focused, will impact the learning community by streamlining and/or enhancing access to financial aid resources and thereby assist members of the community in reaching their higher education goals. While no learning community persons outside of CMC are on this task force, this group has relied heavily on community feedback and other appraisals to address known deficiencies and core functional processes with the CMC financial aid office. The large amount of data in our new Q & A section is all essentially feedback from the learning community and CMC offices that serve our students. Since the start of this action project last March, the breath of involvement has been many hours of research, meetings, assignment of tasks to committee members, evaluating analytics (Google FA page views, unique page views, average time on pages, entrances, bounce rate, percentage of exits and assigned page values) prioritizing the 7 action items established for this group and establishing methods to measure and quantify the effectiveness of our efforts. It will require an

extended period of year to year comparisons of data such as call volume, wait times, email inquiries, the number of FAFSAs filed, the number of files completed in relation to enrollment, analytics from the FA HUB, feedback from FATV, College Goal Sunday results and measuring social media hits in order to determine the true effectiveness of this task force.

We are confident that with the support of CMC's administration and the collective efforts of others to bring our office into 21<sup>st</sup> century technology that we will see vast improvements to the CMC financial aid system and thereby vast improvement in service to our students.

**Financial Aid Action Team Leader:** Tom Valles, Director of Financial Aid

**Members and areas representing**

Marketing: <b>Beth Zukowski</b>	Counselor, commuter: <b>Craig Farnum</b>
Financial Aid Staff, residential: <b>Natalie Torres</b>	Counselor, residential: <b>Chris Harnden</b>
Financial Aid Staff, commuter: <b>Peter Kuk</b>	Business Office: <b>Willa Kane</b>
Instructional and Student Affairs: <b>Robin Dove</b>	

Suggested Resources (when needed):

Foundation Office: <b>Carol Efting</b>	Educational Tech: <b>Suzanne Thompson</b>
Instructional Chair(s): <b>various</b>	Vice President for Student Affairs: <b>Lin Stickler</b>
Noel-Levitz Resource (research and best practices): <b>Shane Larson</b>	

**Admissions Engagement Action Team** is made of representatives from many different departments across the College. We have a very active group that includes Registration Techs, Counselors, Admissions, Marketing, Online and the Foundation. All bring a unique perspective on the communications needs to applicants. Registration Techs are very in tune with the logistics of communications while counselors understand the needs of the students. Marketing and Admissions bring the perspective of the goals of our communications and strategies on being effective. Together we are working very well together to develop efficient and effective long term communication plans

**Admissions Engagement Leader:** Shane Larson, AVP of Enrollment Services

**Members and areas representing**

Marketing: <b>Brian Stoess</b>	Student Services: <b>Lourra Barthuly</b>
Residential Life: <b>Lynda Tieck</b>	Admissions: <b>Blair Lowery</b>
Admissions – residential: <b>Mary Laing</b>	Counselor, commuter: <b>Jen Cantway</b>
Admissions – commuter: <b>Gloria Farmer</b>	Counselor, residential: <b>Lisa Runck</b>
Admissions – on-line: <b>Patti Holt</b>	Foundation: <b>Carol Efting</b>

Suggested Resources (when needed):

Career & Technical Ed Faculty: <b>various</b>
Information Technology: <b>Karleen Clark</b>
Business Office Resource (\$\$ impacts): <b>Mary Lehrman</b>
Vice President for Student Affairs: <b>Lin Stickler</b>

## 5: EFFECTIVE PRACTICES

- A:** Our perpetual system of listing initiatives, rating initiatives and prioritizing the top initiatives based on highest impact to access or success and including a check-off sheet that must be completed to close the project out have been beneficial tools that quickly focused CMC on the top two areas of greatest impact.

## 6: ANTICIPATED CHALLENGES TO PROJECT SUCCESS

- A:** The challenge of human resources not being unduly strained by the number of processes addressed at one time and limiting staff to one team at a time given the expansion to greater automation and technology upgrades. As we live the projects and upgrades, the below timeline may shift and extend to accommodate the human resource capacity.

## 7: PLANNED NEXT STEPS AND TIMELINE

- A:**
- |                  |  |
|------------------|--|
| October 2014:    | Teams map and measure current process(es)  |
| November 2014:   | Teams streamline process and/or propose necessary changes and costs needed.                                |
| Dec/Jan 2014/15: | New process training occurs, post measurements occur.  |
| Feb 2015:        | Results communicated to leadership, documented in TaskStream, website, publications and Systems Portfolio. |
|                  | Process for engraving training and auditing the process are established and documented.                    |
| July 2015:       | Next prioritized processes identified and cycle begins again   |

The gap between February and July is due to scheduled technology upgrades that heavily impact Student Affairs personnel and will

auto-correct several processes currently on the list to be addressed.

## 8: ADDITIONAL INFORMATION, QUESTIONS, OR CONCERNS

A: None

## Update Review

### 1: CURRENT PROJECT STATUS SUMMARY

A: In alignment with its Strategic goals and to improve student learning, Colorado Mountain College (CMC) has launched a number of continuous improvement projects. The College is to be commended for moving forward action on this project that impacts students and aligns with its Strategic Priorities. Bringing processes that impact Financial Aid and Admissions directly impacts the services that are important to students. The action of upgrading technology (dating back to 2005) will significantly impact College personnel and College operations, especially given that a new position, College Registrar was created. In order to bring this upgrade to maturation, the College will need to make sure resources are allocated to key process development and training for employees. Good work on prioritizing processes and resource allocation to Strategic Priorities. The College has an ambitious end date for the project, and the College is moving at a pace that aligns to this date.

### 2: ORIGINAL PROJECT GOALS AND DELIVERABLES

A: Prioritizing processes and focusing on high impact deliverables first is likely a project focus that will work. Although the College plans to use a rating form to identify the highest impact priorities first, the College may want to consider who has a voice in this process. The College may also want to create "calendar" that includes target dates for the various processes. The target dates is one way to measure if the project is moving at a pace that makes a difference to institution. Even though measures/metrics are listed, targets are not identified. Setting targets may assist the college in determining success. Again, the College is to be commended for making this project a priority.

### 3: ACCOMPLISHMENTS OVER THE PAST YEAR

A: CMC has made great strides in planning continuous improvement and these include: implementation of Elucian's Financial Aid Hub; embedded Financial Aid TV videos in the College's homepage; expanded Q & A in the CMC's homepage; and established a social media presence through Facebook. The College has an opportunity to quantify and measure the effectiveness of all its new initiatives in planning continuous improvement.

### 4: INSTITUTIONAL INVOLVEMENT

A: CMC involved a wide spectrum of participants from the institution for this project. The Financial Aid Action Team is primarily responsible for overseeing these tasks and various units (financial aid, business office, marketing, Online, Foundation, and counselors) are involved and share in meeting established goals.

This involvement of multiple stakeholder groups shows that the College is focusing on: AQIP Category 5 KNOWLEDGE MANAGEMENT & RESOURCE STEWARDSHIP addresses management of the fiscal, physical, technological, and information infrastructures designed to provide an environment in which learning can thrive.

In addition, the College is demonstrating promoting collaboration and Broad-based involvement, both principles of high performing organizations.

### 5: EFFECTIVE PRACTICES

A: CMC has made great strides in planning continuous improvement and these include: implementation of Elucian's Financial Aid Hub; embedded Financial Aid TV videos in the College's homepage; expanded Q & A in the CMC's homepage; and established a social media presence through Facebook. The use of social media is a growing trend among those in higher education. Linking success of key processes that impact student engagement and enrollment to social media may be a best practice that could be shared with other institutions.

### 6: ANTICIPATED CHALLENGES TO PROJECT SUCCESS

A: Having enough capital and human resources are limiting factors towards achieving these goals; therefore, the CMC may want to concentrate on top priorities. If the timeline shifts due to factors beyond the project team's control, this is because of limited resources. Hence, as the College recognizes establishing top priorities is essential to this project's success.

## 7: PLANNED NEXT STEPS AND TIME LINE

- A:** The project is active and the next steps are logical. In addition, the College has included in its next steps how to determine the sequencing of processes, how to communicate these processes to leadership, and the College community, and how to document these processes in the Systems Portfolio, showing the connection to continuous quality improvement. The College is on target to accomplish, document, and establish key processes that positively impact students.

## 8: ADDITIONAL INFORMATION, QUESTIONS, OR CONCERNS

- A:** In alignment with its Strategic goals and to improve student learning, CMC has embarked on a number of continuous improvement projects. CMC may want to benchmark with other institutions to find out how they have managed these processes and challenges through AQIP Action Project information in the AQIP Action Project database.

## Project Outcome

### 1: REASON FOR COMPLETION

- A:** The project is complete. The overarching goal was to create a perpetual system for review and streamlining of systems/processes. This process is complete with flow chart, checklist, (appended at end of document) and identified actions teams. In addition, through this process the College has come to recognize that our integrated technology system is extremely out-of-date and is a primary reason for our poor systems and processes.

### 2: SUCCESS FACTORS

- A:** All aspects have been successful. An annual review process is now in place. Several major system improvements have launched with the College investing significant resources to bring Colorado Mountain College (CMC) up to current technologies. We began implementing new Colleague Modules (our integrated technology system) in September, 2014 which will proceed over the next three years. Modules include: new Portal, Student Planning, Reporting & Analytics, and a CRM – Recruiter. Further, several Business Process Reviews are scheduled with experts in Colleague including: Finance, A/R, Financial Aid, Degree Audit, Admissions & Registration.

In addition to the Information System upgrades, we have and are currently in the process of automating internal systems that have previously relied heavily on manual processing. The first achievements were the launch of automated transcript request processing and the printing of diplomas in-house resulting in significantly reduced human resource hours, costs and a dramatic reduction of the turnaround time to fulfill requests (please reference "Results" below).

One final note, given the recognition of the need to upgrade our technology, the Student Affairs division was approved for and hired a Registrar's Systems Specialist position that focuses entirely on learning the current manual processes and then automating these processes within our existing ERP solution set or finding an automation solution.

The partnership with Parchment made a significant impact for CMC.

- Over 30 plus man hours per week saved through this partnership.
- A (to be determined) cost savings in postage, transcript paper, envelopes and other general office supplies will be significant. (general estimate of \$4,000-\$6,000/year)
- Students can order transcripts 24/7 and have the ability to track orders. Orders are 100% online.
- Currently we only fax or mail transcripts. Many institutions prefer to receive eTranscripts.
- Zero cost for CMC and could also someday be a revenue generator.
- Students will pay less than \$3 for eTranscripts and \$2 more for paper.

#### Scrip-Safe Partnership Highlights

- Diplomas previously had to be ordered 6 weeks before graduation. Now we can print all diplomas for graduation in fewer than 30 minutes.
- In 2014 we spent \$17,110 on diplomas; this was \$3,866 over budget.
- We had approximately 15% of diplomas ordered were for students who did not graduate. That is about \$2566 in discarded diplomas.
- In 2015 we will reduce our costs to about \$13,000 and in 2016 costs should be reduced by another \$5,000-6,000, effectively cutting our graduations costs in half moving forward.
- We used this opportunity to modernize the look of our diplomas and to make them full size (8 ½ x 11)
- Students are now able to Petition to Graduate in their final semester instead of in the semester preceding their final semester. This will reduce the number of Petitions from students hoping to graduate thus reducing workload on Advisors, Counselors and Registrar's Staff.

### 3: UNSUCCESSFUL FACTORS

A: None