Implementing the Principles of Excellence for Serving Service Members, Veterans and their Families

Presented by:
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Tuesday April 1, 2014 3:45-4:45 Room 205
Session ID 1929
Session Rules of Etiquette

• Please silence your cell phone/pager

• Please complete the session evaluation using the AACRAO mobile app or the paper form in your registration packet, drop boxes are available throughout the convention center.

• If you must leave the session early, please do so as discreetly as possible

• Please avoid side conversation during the session

Thank you for your cooperation!
Outline

• Overview: Principles of Excellence and Public Law 112-249

• Implementation at three universities
  • Oklahoma State University
  • University of Virginia
  • Colorado State University

• Questions/share your implementation experience
Overview: Principles of Excellence and Public Law 112-249
Executive Order 13607 (Principles of Excellence)

- Signed in April 2012
- Principles for Educational Institutions Serving Service Members, Veterans, Spouses and other Family members
- Designed to protect veterans and service members from deception and provide adequate information so they can make informed decisions
- Designed to protect Federal military and VA educational benefits
- Participating schools are listed on the VA’s POE website
Principles of Excellence participants agree to:

- Provide students with a personalized form covering the total cost of an education program
- Provide educational plans for all military and Veteran education beneficiaries
- End fraudulent and aggressive recruiting techniques and misrepresentations.
- Accommodate Service members and Reservists absent due to service requirements.
- Designate a point of contact to provide academic and financial advice.
- Ensure accreditation of all new programs prior to enrolling students.
- Align institutional refund policies with those under Title IV, which governs the administration of federal student financial aid programs.
Public Law 112-249: Comprehensive Veterans Education Information Policy:

• Approved in January 2013
• Consistent with Executive Order 13607 and formalizes it as federal law
• Also charges the VA, US Dept of Education and State Accrediting Agencies to work together to improve outreach and transparency for veterans and service members
• Related state laws
Implementation at Oklahoma State University
OSU Implementation Process

- Intent to comply
- Implementation Leadership Team
- Conceptualization: Areas, Expectations, Responsible Offices, Area Leaders
- Guidance from US Dept of Ed and VA
- Written progress reports and End of Year summary to Provost
Selected OSU implementation activities

- Standardized cost form
- Disclosure and misrepresentation mindfulness
- Identification of service members, veterans and families
- Academic and financial counseling points of contact
- Military leave of absence accommodations
- Website for military and veteran students
- Future Plans
Military Leave of Absence Accommodations

• Do you provide special accommodations for service members and reservists absent due to service requirements?
• Refunds?
• Readmission accommodations?
• Extended degree completion time?
• Revert to the tuition/fee charges that the student was paying when he/she was called to duty?
• Special assistance to help the returning student complete his/her degree?
Serving Active Duty Service Members

University of Virginia
Sheila F. Tolley
Active Duty Students at University of Virginia

- Approximately 600 service members and/or their family members
  - 125 Active Duty
  - 10 Reservist/National Guard
  - 480 Veterans
- Approximately 450 students receive Veteran’s Benefits
  - 250 Dependents
  - 200 Veterans
Serving our military related students requires compliance with state and federal regulations and mandates

• Department of Defense MOU
• Veteran’s Administration certification
• State Laws and Regulations
• Principles of Excellence
Pre - Principles of Excellence
U.Va. responses to Federal and State mandates/regulations:

- Worked to create and hire a dedicated position to manage Veterans’ Affairs in October 2011
- Created a University Veterans Matters Group
- Improved communication and relations with SFS
- Partnered with the Regional Representative of the Wounded Warrior Program to provide regional information to service members
Principles of Excellence U.Va. responses

- Manage and monitor School Publications regarding Military benefits, requirements, and expectations
- Provide students with detailed information regarding financial aid and Military and Veteran benefits
- Continued to request and obtain the approval of the institution's accrediting agency for new course or program offering before enrolling students
- Provide students with Academic Requirement Reports
Principles of Excellence U.Va. responses

Active Duty in the Uniformed Services

In accordance with the “Virginia Tuition Relief, Refund, and Reinstatement Guidelines,” University students in the uniformed services under call or order to active duty, of more than 30 days, after the beginning of a semester or summer session have two options they may consider with the dean's office of their school of enrollment and UREG (Office of the University Registrar) in determining their enrollment status with the University:

Students may withdraw from all courses in which they are enrolled as of the effective date of the call or order to report to active duty. When this option is selected, a full credit of all tuition and fees, and any pre-paid tuition, room, or board deposits, will be made to the student. The notation "Withdrew for military service [date]" will be added to the official transcript.

Students may take a grade of incomplete in all courses. The conditions for completing course work and receiving a regular grade should be agreed to between the student, course instructors, and the appropriate dean's office of the school in which the student is enrolled. Upon separation from active duty, and subject to the reinstatement provisions below, students may complete the course work without paying any additional tuition and fees for the semester. No notation is added to the transcript, and the incomplete grades are changed to final grades when the coursework is completed.
Principles of Excellence U.Va. Responses: Priority Enrollment process for military related students

**Enrollment Appointment Date Assignment:**

- Academic fourth-year Transition, Echols, Rodman, College Arts Scholars, College Science Scholars, Military, Veteran, and ROTC, men's and women's basketball, cross country, golf, lacrosse, swimming and diving, track and field, and tennis; baseball, softball, rowing, and wrestling, random within year
- Academic fourth-year, random within year
- Academic third-year Transition, Echols, Rodman, College Arts Scholars, College Science Scholars, Military, Veteran, and ROTC, men's and women's basketball, cross country, golf, lacrosse, swimming and diving, track and field, and tennis; baseball, softball, rowing, and wrestling, random within year
- Academic third-year, random within year
- Academic second-year and Academic first-year Transition, Echols, Rodman, College Arts Scholars, College Science Scholars, Military, Veteran, and ROTC, men's and women's basketball, cross country, golf, lacrosse, swimming and diving, track and field, and tennis; baseball, softball, rowing, and wrestling, random within years
- Academic second-year, random within year
- Academic first-year, random within year
- College students who fail to verify their enrollment
Principles of Excellence at CSU

Colorado State University
Marc Barker
Benefit eligible population at CSU

- Approximately 1250 service members and /or their family members and veterans
- ~150 active duty, guard and reserve TA
  - Includes all branches of military and coast guard
- ~1050 Veteran Benefit users
  - ~350 dependents
  - ~700 veterans
POE compliance at CSU

- Process employed at Colorado State
- Compliance work group focus on section II of Executive Order
- Work group, Registrar, Vet benefit office, SFS, Admissions, ALVS, review by general counsel
POE compliance at CSU

• Executive Order Section 2(a)

• “…personalized and standardized form…to help those prospective students understand the total cost of the education program…”

• “…tuition and fees; the amount of that cost that will covered by Federal educational benefits; the type and amount of financial aid they may qualify for; their estimated student loan debt upon graduation; information about student outcomes; and other information to facilitate comparison of aid packages offered by different educational institutions…”
PoE compliance at CSU

- Shopping Sheet details
  - Clarification of prior to enrollment and prospective student language in Sec 2(a)
  - CSU roundtable, reached out to DoD but no reply
  - Timing issues related to student record processing drove the answers for CSU re these questions
POE compliance at CSU

- Financial Aid
  - Section 2(b) language “…inform students who are eligible to receive Federal military and veterans eligibility benefits of the availability of federal financial aid…before packaging…private student loans…”
  - Compliance: admitted student packets refer all students to FAFSA, many websites for veterans that inform them of resources for paying for college.
  - Refund policy Section 2(f) “…agree to an institutional refund policy that is aligned with the refund…rules applicable to Federal student aid…”
    - Can’t have a separate refund policy for these students
  - Section 2(h) “…designated point of contact for academic and financial advising…”
## Costs in the 2013-2014 year

<table>
<thead>
<tr>
<th>Item</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimated Cost of Attendance</td>
<td>$28,213.00</td>
</tr>
<tr>
<td>Tuition and fees</td>
<td>10996.00</td>
</tr>
<tr>
<td>Housing and meals</td>
<td>8982.00</td>
</tr>
<tr>
<td>Books and supplies</td>
<td>674.00</td>
</tr>
<tr>
<td>Transportation</td>
<td>1526.00</td>
</tr>
</tbody>
</table>

## Grants and scholarships to pay for college

- Total Grants and Scholarships (*Gift* Aid; no repayment needed)
  - Grants and scholarships from your school
  - Federal Pell Grant: 3295.00
  - Grants from your state: 1250.00
  - Other scholarships you can use

## What will you pay for college

- **Net Costs** (Cost of attendance minus total grants and scholarships): $17,713.00

## Options to pay net costs

### Work options
- Work-Study (Federal, state, or institutional): 8909.00

### Loan Options*
- Federal Perkins Loans: 0.00
- Federal Direct Subsidized Loan: 5500.00
- Federal Direct Unsubsidized Loan: 2000.00

*Recommended amounts shown here. You may be eligible for a different amount. Contact your financial aid office.

## Other options

- **Family Contribution** (As calculated by the institution using information reported on the FAFSA or to your institution.): $2,377.00
  - Payment plan offered by the institution
  - Parent or Graduate PLUS Loan
  - Military and/or National Service benefits
  - Non-Federal private education loan

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3/14/2014
**Glossary**

**Cost of Attendance (COA):** The total amount (not including grants and scholarships) that it will cost you to go to school during the 2014–15 school year. COA includes tuition and fees; housing and meals; and allowances for books, supplies, transportation, loan fees, and dependent care. It also includes miscellaneous and personal expenses, such as an allowance for the rental or purchase of a personal computer; costs related to a disability; and reasonable costs for eligible study-abroad programs. For students attending less than half-time, the COA includes tuition and fees; an allowance for books, supplies, and transportation; and dependent care expenses.

**Total Grants and Scholarships:** Student aid funds that do not have to be repaid. Grants are often need-based, while scholarships are usually merit-based. Occasionally you might have to pay back part or all of a grant if, for example, you withdraw from school before finishing a semester.

**Net Costs:** An estimate of the actual costs that you or your family will need to pay during the 2014–15 school year to cover education expenses at a particular school. Net costs are determined by taking the institution’s cost of attendance and subtracting your grants and scholarships.

**Work-Study:** A federal student aid program that provides part-time employment while you are enrolled in school to help pay your education expenses.

**Loans:** Borrowed money that must be repaid with interest. Loans from the federal government typically have a lower interest rate than loans from private lenders. Federal loans, listed from most advantageous to least advantageous, are called Federal Perkins Loans, Direct Subsidized Loans, Direct Unsubsidized Loans, and Direct PLUS Loans. You can find more information about federal loans at StudentAid.gov.

**Family Contribution (also referred to as Expected Family Contribution):** A number used by a school to calculate how much financial aid you are eligible to receive, if any. It’s based on the financial information you provided in your Free Application for Federal Student Aid (FAFSA). It’s not the amount of money your family will have to pay for college, nor is it the amount of federal student aid you will receive. The family contribution is reported to you on your Student Aid Report, also known as the SAR.

**Graduation Rate:** The percentage of students who graduate from an institution. This shows students who began their studies as first-time, full-time degree- or certificate-seeking students and completed their degree or certificate within 150 percent of "normal time." For example, for a four-year school, the graduation rate would be the percentage of students who completed that program within six years or less.

**Loan Default Rate:** The percentage of student borrowers – undergraduate and graduate – who have failed to repay their federal loans within three years of leaving a particular school. A low loan default rate could mean that the institution’s students are earning enough income after leaving school to successfully repay their loans.

**Median Borrowing:** The amount in federal loans the typical undergraduate student takes out at a particular institution. It also indicates the monthly payments that an average student would pay on that amount using a 10-year repayment plan.
CSU Summary

- 2014 staffing
  - 3.0 certifying officials, 6 va student employees, non-student hourly
  - 2009 .5 FTE

- Staffing level allows us to certify, advocate at the legislative level, (more than implementation), know what is coming and advocating for change

- Participate in NAVPA, regional associations, work with congressional delegation
Resources

Questions and Thank You!

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