California Community Colleges

Welcome!

Reimagine Apply
Task Force
Session 3

April 10th, 2024

Your Facilitators & Support Team

Janet Kung
Account Lead

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Delivery Lead

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Functional Lead

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Senior Analyst

California Community Colleges

Reimagine Apply Working Sessions + Task Force

Working initially with stakeholders directly impacted by potential data usage changes in restructuring questions in CCCApply. Task Force participants will be selected by their state organization to join the Task Force in February 2024. The Task Force will give input on the Target State, new application governance and High-level Roadmap for implementation of a new application system.

In-Person

WORKING SESSIONS

2024

TASK FORCE

Wednesday Feb 14th
Target State Vision

Wednesday September 18th

Virtual

Oct / Nov/ Dec / Jan
"Core" Questions
Target Concepts
+
Target State Alignment

Wednesday Mar 13th
Application Governance

Wednesday April 10th
Target State Refinement

Wednesday May 15th
Roadmap

Wednesday June 26th

Thursday August 8th

Open Invitation (statewide):
A&R, Financial Aid, CSSO, CIO, IR, Student Senate

TASK FORCE Members: Academic Senate, Student Senate, A&R, Financial Aid, CEO, CIO, CISO, CSSO, IR, PIO, CCCCO

California Community Colleges

April Task Force Agenda

Time	Activity
1:00 PM	Welcome
1:10 PM	Session Objectives
	Spotlight: Working Groups
	Where We've Been
	Target State Recap
2:30 PM	Break
	Target State & Breakouts
	Finalize Vision
3:50 PM	Next Steps & Wrap-Up
4:00 PM	END

Agreements

California Community Colleges

Timeboxed

GELMO
"Good Enough Let's Move On"

Assume Positive Intent

Be present and inclusive (everyone is heard)

Parking Lot
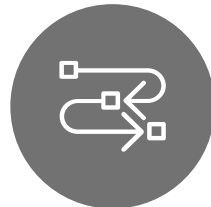
Trust the process
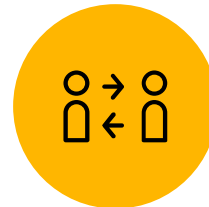
Give Grace

Be curious and solution-oriented

April Task Force Objectives

Reflect on where we've been

Align on the Target State vision

Collaborate on the direction we are headed

Identify unanswered questions and new paths forward

March 2024 Residency Working Session

7 Working Group Attendees

5 Districts Represented

Ideation Boards:

Attendees:

- Ashley Dunn, Director – Los Angeles Valley College
- Veronica Fisher, Director – State Center Community College District
- Sonya Horn, Manager of Enterprise Applications, Yuba College
- Michael Kellogg, Residency Specialist – College of the Siskiyous
- Jennifer Maller, District Registrar – Yuba College
- Lynn Neault, CEO – Grossmont Community College District
- Patrick Walton, Vice President of Student Services – College of the Siskiyous

March 2024 Residency Working Group Insights

In our ideation session, the Residency working group shared the key insights they've heard on their campuses, friction points they're facing and proposed next steps

Key Insights & Friction Points ✏️

Applicants Struggle with the User Experience

- Applicants struggle to understand the "why" around residency questions and would benefit from clarity on the residency objectives
- Applicants don't find the questions to be user-friendly and have a hard time understanding what is being asked

Algorithm Complexities and Nuances

- The application doesn't automatically validate addresses which leads to "flags", manual interventions, confusion, and unnecessary delays for applicants
- The algorithm automatically flags certain populations (e.g., foster youth as unable to qualify as status 1 residents)
- The many nuances in the algorithm code require students to enter a lot of information

Current Residency Rules & Processes

- The residency rules are not generally understood, the group consensus was that it is highly complex
- Significant amount of money and time spent reconciling residency flags

Legislative Complications

- The nature of the legislature and its constant changes makes it difficult to keep up
- Some laws have never been evaluated, but they determine how much we can alter the application

Next Steps 📨

Quick Wins

- Implement automatic USPS Database Address Validation Tool
- Provide context to students as to why they are asked the Residency questions

Long-term Success

- If legally feasible, require Residency re-visitation only for those who are out of district or out of state (i.e., you don't have to apply again unless your address changes to out of district)
- Establish team and resources (including legal) to focus on Residency laws and algorithm maintenance
- Enable an "upload document" feature in the application

March 2024 Fraud Working Session

10 Working Group Attendees

6 Districts & Organizations Represented

Ideation Boards:

Attendees:

- Anthony Cervantes, Dean of Enrollment Services – Foothill College
- Devin Crosby, Chief Technology Officer – Yuba College
- Annie Koruga, Student Senate
- Elaine Kuo, College Researcher – Foothill College
- Jackie Lau, Assistant Director of Admissions & Records– Bakersfield College
- Lisa Mandy, Director of Financial Aid & Scholarship, De Anza College
- Patricia Mendoza, Director of Financial Aid, Foothill College
- Chien Shih, Associate Vice Chancellor – Foothill De Anza CCD
- Michelle Smith, Visiting Assistant Vice Chancellor – Chancellor's Office
- Ruthie Welborn, Assistant Director of Financial Aid – Bakersfield College

March 2024 Fraud Working Group Insights

In our ideation session, the Fraud Working Group shared existing efforts and best practices on their campuses to mitigate fraud, current friction points, and proposed next steps

Key Takeaways

- **Fraudsters' patterns and technology are constantly evolving**, rendering traditional measures and technology of limited effectiveness
- **Strengthening fraud defense by centralizing and sharing data is key**, as it counters fraud migration to vulnerable points and enables automation that keeps pace with evolving patterns
- College-wide efforts are needed to **educate all faculty and staff about the updates in fraudulent enrollment**
- Measure to mitigate fraud can **unintentionally create hurdles for genuine applicants** (e.g., requiring additional FAFSA tax information)
- **Additional clarity about data handling in ID.me could improve ID.me participation rates** by clarifying the data's destination and use
- **OpenCCC Spam filter and how colleges interact with it** have led to more manual labor and undetected fraudsters at the campuses

Next Steps

Local Level

- Engage a third-party vendor for thorough vetting of documents and identity verification to enhance security
- Create cross-departmental discussions with Admissions & Records and Financial Aid (possibly facilitated by organizations like CACCRAO) to share insights on fraud trends, mutual training, and pattern recognition
- Develop a system to avoid mistakenly flagging returning students
- Enable data lake support to provide local colleges applicant historical view and chosen majors across campuses

State Level

- Establish a centralized database to share information on fraudulent activities across campuses for better detection and prevention
- Implement Customer Relationship Management (CRM) software for immediate fraud pattern analysis and student identity validation
- Deploy automation tools / dedicated help desk for tasks like address validation and ID.me confirmations
- Establish a comprehensive institutional strategy to educate all faculty and staff on fraud detection and prevention across departments and campuses

Where We've Been & Where We're Going

2023

February	March	April	October	December	January

2024

February	March	April	May	June	August

STWG Workshop #1

Context Setting

Interview Synthesis & Application Review – What We Heard & What We've Seen

Improvements Timeline

Task Force Purpose

STWG Workshop #2

Vision

Guiding Principles for Task Force

Short-term 'wins' in CCC Apply

Current State Personas for redesign process

STWG Workshop #3

Recruitment, Engagement & Communications plan for Task Force Validated

Key Milestones for Redesign Roadmap

Working Session #1

Educational Goal

Programs & Services

Education History

Working Session #2

Unique Student Needs

Revised Content

Design Preview

Working Session #3

Target State Alignment

Ideal Data Journey

Residency Challenges

Task Force Kick-off

Target State Vision

Task Force #2

Application Governance

Task Force #3

Target State Refinement

Task Force #4

Roadmap

Task Force #5

TBD

Task Force #6

TBD

From our Task Force Kick-off

STWG – Short-term Working Group (of the Consultation Council)

11

Target State: Design & Student Experience
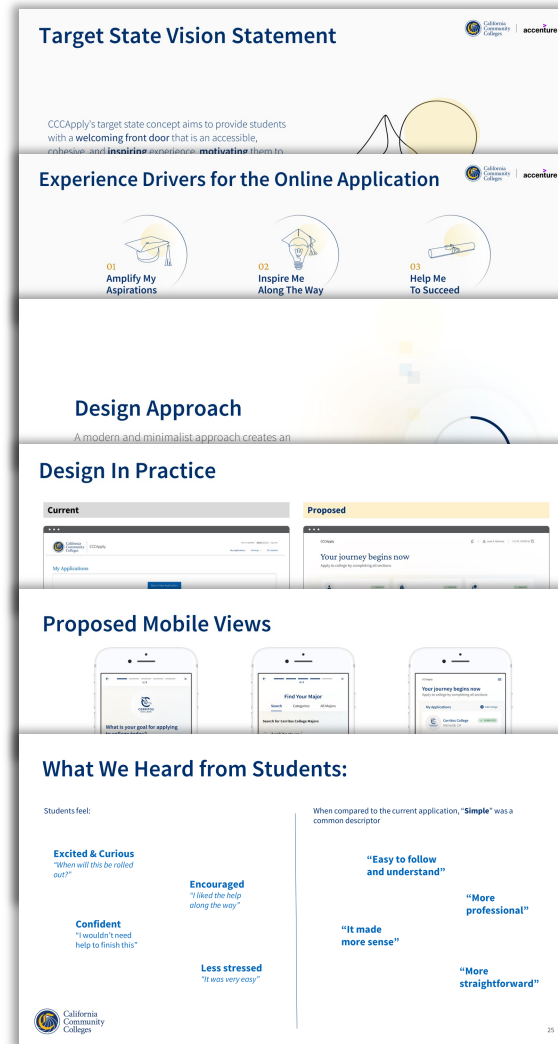
Key Points:

User-friendly design:

- The design consisted of a rigorous process of user experience research, literature review, peer comparisons, stakeholder and student interviews, and student testing
- These insights led to a mobile-first application with simplified questions and reorganized content in a structure that better aligns with a student's mental model for applying to college

Resilient Layered Fraud Detection:

- The fraud strategy utilizes multiple methods of detection, including advanced analytics, behavioral biometrics, and machine learning algorithms, to identify and mitigate fraudulent activities
- These methods ensure a secure and trustworthy environment for users and maintain the integrity of the application process

# Target State: Updated Technology & App Tools

✎ Key Points:

- **Updated Technology**
  - Commercially powered modern technology system that can integrate with District SIS and third-party systems (e.g., CCGI – Ca College Guidance Initiative)

- **Application Tools in Higher Education**
  - Improve the user experience for students and stakeholders
  - Allow financial aid, admissions and records and student support services to personalize communication and optimize their engagement with the student
  - Providing improved analytics
  - Expand functionality to stay up to date with modern needs
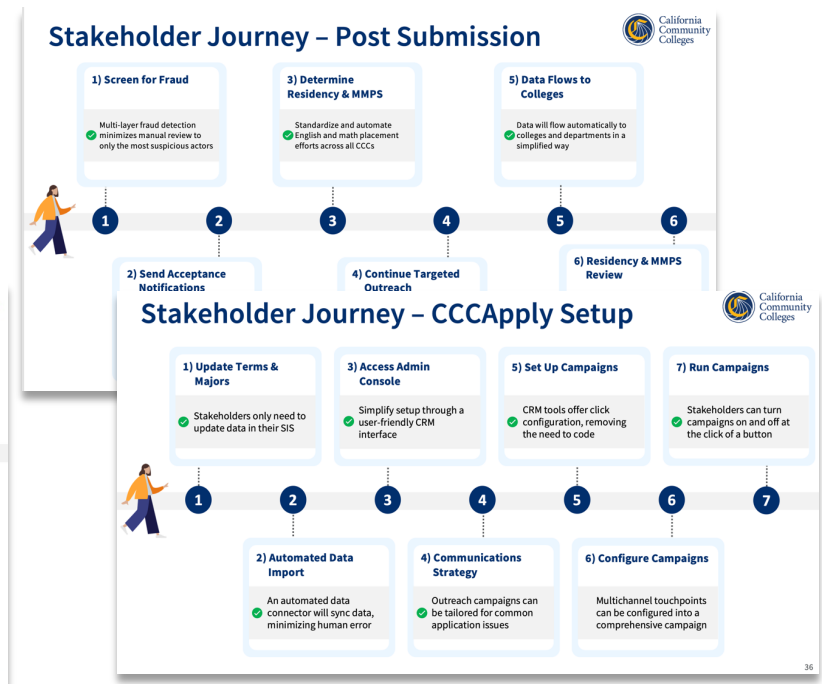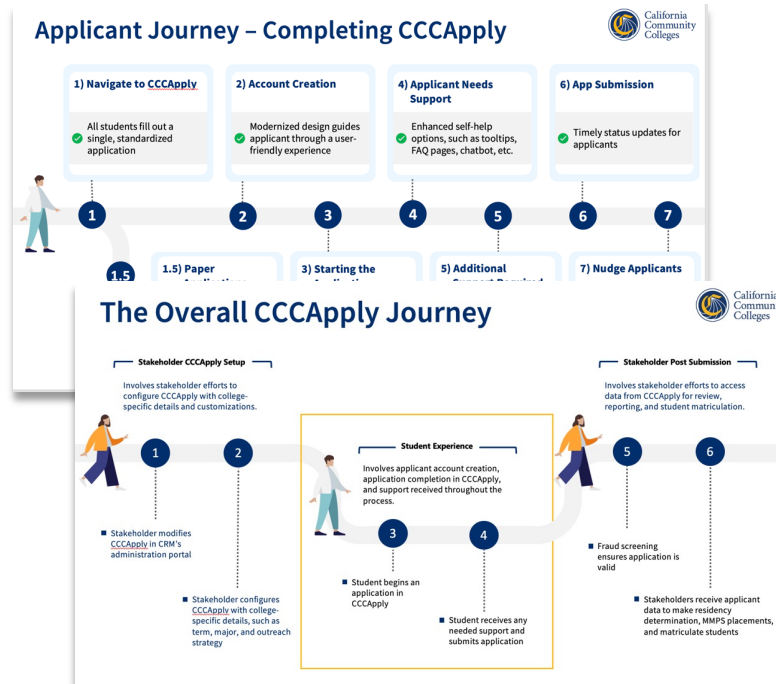
Art of the Possible: Insights into Application Tools

A commercial solution can:

Streamline and modernize the application user experience for applicants, student, and college staff

Provide robust features to automate administrative efforts

Modernize and scale accordingly to meet evolving needs

Deliver self-service options for applicants and staff to expedite troubleshooting

Reduce cost to operate, maintain, and update a legacy application system

A commercial solution can consolidate existing technology into a centralized place:

OpenCCC
CALIFORNIA COMMUNITY COLLEGES

CCCAPPLY
CALIFORNIA COMMUNITY COLLEGES

CCCADMINISTRATOR
CALIFORNIA COMMUNITY COLLEGES

MyPath
CALIFORNIA COMMUNITY COLLEGES

Potential commercial solutions can do the following:

1 **Improving the user experience for students and stakeholders:**

- ✓ Enhance usability for students seeking to apply to a CCC through a centralized application with improved branching and pagination
- ✓ Streamline and simplify activities for stakeholders, enabling them to focus on supporting students

2 **Expanding functionality to stay up to date with modern needs**

- ✓ Deliver personalized student communications through multiple channels (e.g., email, SMS, and call)
- ✓ Support students and stakeholders through a variety of self-service support options, such as chatbots and knowledge bases

3 **Modernizing and scaling technology**

- ✓ Improve scalability and performance to accommodate the diverse needs and growing applicant user base of CCC
- ✓ Enhance security to protect sensitive data and ensure compliance with data privacy regulations
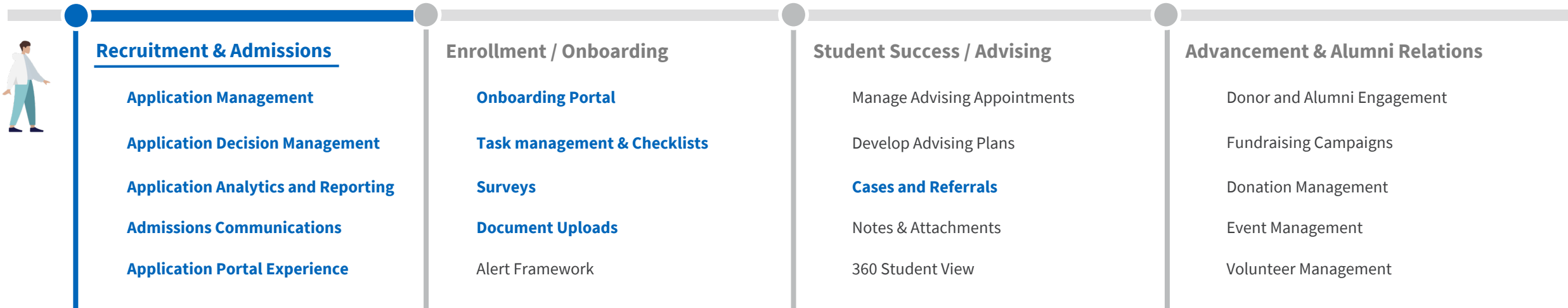
CRM: Definition & Capabilities

What is a CRM?

A CRM (**constituent relationship management)** system is designed to manage, track, and improve interactions with applicants, students, alumni, faculty, and other key stakeholders relevant for higher education institutions.

A CRM can serve as a **centralized platform** to **streamline and automate key processes** across the end-to-end Student Lifecycle. This lifecycle includes **Recruiting and Admissions**, Enrollment and Onboarding Management, Student Success and Advising, and Alumni Relations.

A CRM can **provide institutions with crucial capabilities** to enhance the user experience expected by applicants, meet student demographic shifts in a timely manner, and enable staff to more efficiently support students.

End-to-End Student Lifecycle: Key CRM Capabilities

Recruitment & Admissions	Enrollment / Onboarding	Student Success / Advising	Advancement & Alumni Relations
Application Management	Onboarding Portal	Manage Advising Appointments	Donor and Alumni Engagement
Application Decision Management	Task management & Checklists	Develop Advising Plans	Fundraising Campaigns
Application Analytics and Reporting	Surveys	Cases and Referrals	Donation Management
Admissions Communications	Document Uploads	Notes & Attachments	Event Management
Application Portal Experience	Alert Framework	360 Student View	Volunteer Management

Recruitment and Admissions functionality is in alignment with the target state vision of Reimagine Apply for the California Community Colleges.

Target State: Governance

✏️ Key Points:

Governance Benefits

- Governance creates a set of rules to decide what changes will be made to the application ensuring those changes align to legislated requirements, the users' needs and the latest technology

Governance Structure

- The collaborative governance structure, involving the Application Team and the Chancellor's Office, ensure all updates support the student experience and are communicated to the field

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Governance Objectives

Strategic Alignment	Accountability & Responsibility	Clarity of Decisions	Checks & Balances	Speed to Insights	Reduce Compliance Risk
Align organizational activities with its mission, vision, and strategic goals, ensuring that decisions and actions are in line with the overall direction of the organization	Establish clear roles, responsibilities, and accountabilities for individuals within the organization, helping to promote transparency and ensuring that individuals are held responsible for their actions	Develop indisputable decision-making rights to ensure clarity and stickiness of decisions while also reducing time to decision	Ensure different opinions are appropriately weighed, reducing perceived or actual bias and promoting a fair decision-making process	Enable leaders and key stakeholders to gain insights and make decisions more quickly through improved data management	Build policies, processes, and procedures to ensure data is adequately protected and in full accordance with relevant regulations and industry standards

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Governance 101

Governance is like the rulebook for how an organization operates. It details:

Roles & Responsibilities: Who does what	Decision-making: Choosing what to do	Processes: How things get done	Rules: What you can and can't do

Let's take a personal life example and explore its governance: hosting a dinner party at my house

<u>Host</u>: responsible for organizing the event, providing venue, and preparing the meal	<u>Host</u>: decides menu theme and who is invited	<u>Host</u>: does meal preparation, home set-up, clean-up	<u>Host</u>: Provide safe, inclusive environment
<u>Guests</u>: RSVP and bringing potluck dish	<u>Guests</u>: determine appropriate potluck dish	<u>Guests</u>: Timely RSVP, brings dish, may help clean-up	<u>Guests</u>: expected to arrive at the set time, be respectful, and have fun

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Communications in the Target State

Legislative Requests	Performance Management	Internal Change Requests
The Application Team and CCCCO Government Relations Team will **meet on a bi-annual basis** to discuss any changes requested by legislatures, enabling **better coordination** between the parties. **AppTeam will inform relevant stakeholders regarding application changes** requested by legislatures so that they can take appropriate actions (e.g., creating data field).	The Application Team will share **monthly reports with CCCCO** to keep them informed, highlighting any deviations from targets for Service Level Agreements (SLA) and non-SLA metrics.	Notification of whether change requests have been approved or not will be **provided by the AppTeam as well as updates when changes have been implemented**. These implementation updates will be provided in simple, non-technical language.

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Break

Breakout

1. What additional information do you need to effectively communicate the Reimagine Apply Target State with your associations, organizations, and constituencies?

2. When are you planning to communicate this content to your associations, organizations, and constituencies?

Revised Vision Statement

V1

The **CCCApply Transformation** is **a reimagining** of the student admission process that **creates a welcoming 'front door' to all**

V2

The CCCApply Transformation is creating a **student-centric process** to help more Californians **realize their potential** through higher education and career advancement by **removing unnecessary barriers and making it as seamless as possible** to succeed in college

V3

The reimagination of CCCApply aims to make the application process **quick and easy** to ensure **accessibility and equity** in higher education, ultimately opening doors to a **brighter future and career advancement** for all students

Revised Vision Statement

V1

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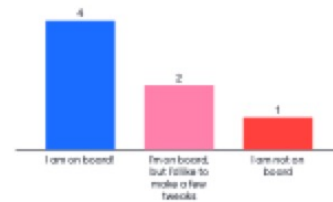
V2

The CCCApply Transformation is creating a **student-centric process** to help more Californians **realize their potential** through higher education and career advancement by **removing unnecessary barriers and making it as seamless as possible** to succeed in college

V3

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Menti

Next Steps

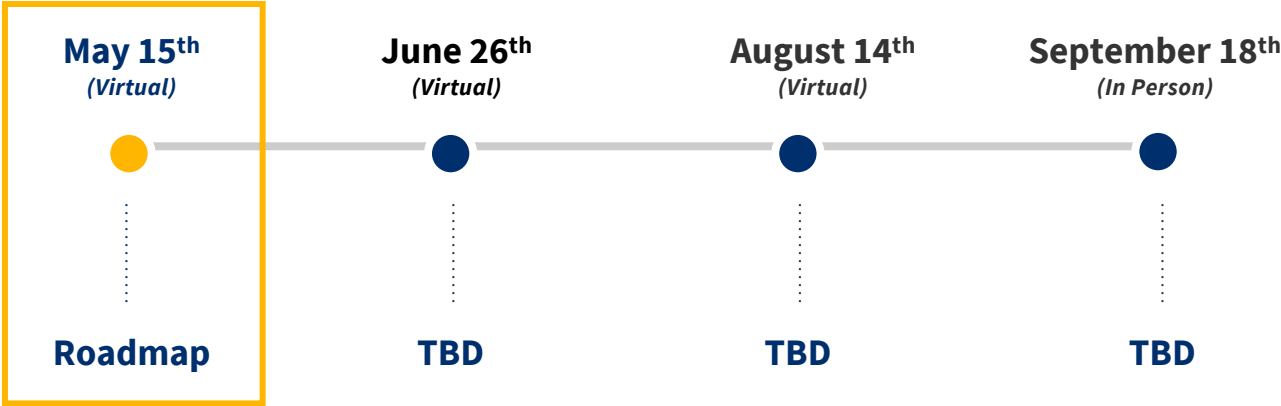**Upcoming Task Forces:**

May 15th *(Virtual)*	June 26th *(Virtual)*	August 14th *(Virtual)*	September 18th *(In Person)*
●	●	●	●
Roadmap	**TBD**	**TBD**	**TBD**

Plus / Delta

Menti

California Community Colleges

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PLUS +

13 responses

Time confetti!

Clear asks on feedback

I appreciat e learning more about the big

Include faculty counselor s on the CRM discussio

I feel more prepared to go to my groups to

Login to edit this Menti

24

Menti

California Community Colleges

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DELTA Δ

1 response

> Not a change I'm requesting but I miss

Login to edit this Menti

Thank You!

Reimagine Apply will:

- improve the user experience

- make the application process easier for students

- improve data accuracy

- better support equitable access

- protect against and mitigate fraud

Student Input

California Community Colleges

ANALYSIS

Conducted **moderated usability testing** with current students to test prototypes of **an updated design** of the CCCApply standard application

1:1 sessions with 11 students using a Figma prototype

20 Student Usability Testing Sessions

WHAT WAS FOUND

We talked to a **range of students** from varying backgrounds and colleges including: first gen, under 18, returning students over 25

More than 50% interviewed were POCs

More than 90% successful task completion rate

TARGET STATE

Mobile-first design is essential

Questions need to **be rewritten for greater clarity**

Ed Goal explanations needed

More disclaimers need to be added to sensitive questions

Questions Analysis

ANALYSIS

Peer comparison of CCCApply to other applications

Evaluated the 5 CCCApply applications types and their College Adoption Rates

Evaluated **2,483 questions** and **fields**

Identified places to **optimize** and reduce student confusion

WHAT WAS FOUND

Standard (100% adopted)
60 questions and 113 fields

Supplemental (80% adopted)
865 questions with 1087 fields
1 to 23 supplemental questions
used by each college

Promise Grant (42% adopted)
38 questions and 19 fields

Non-Credit (32% adopted)
35 questions and 84 fields

International (28% adopted)
35 questions and 147 fields

TARGET STATE

Streamline applications by validating essential data and removing redundant questions where possible

Leverage branching logic to create a **single application for applicants**

Clarify application language to reduce applicant confusion

Stakeholder Input

California Community Colleges

ANALYSIS

141 survey respondents and interviewed 73 stakeholders from 47 districts and 59 colleges to understand usage of CCCApply data.

Engaged 156 stakeholders in 6 working sessions to get **input and feedback** on the new application design, unique student challenges and overall process.

WHAT WAS FOUND

84% of respondents' colleges use additional methods to collect student data

Identified areas for optimization that would improve the student experience and not impede data collection needs

TARGET STATE

Simplify **Ed Goal and Education History**

Revise wording and **groupings for Programs & Services**

Explore **residency criteria and algorithm** to improve applicant experience

Design for the **unique needs** of student populations such as dual enrollment

Technical Analysis

ANALYSIS

Evaluated 11 years of CCCApply documentation
20+ stakeholder interviews

Conducted **architecture/technical** reviews

Recommended **system architecture** and **data flow improvements**

WHAT WAS FOUND

Utilization of the **AWS infrastructure** and **AWS managed services** a strong decision

OpenCCC uses a **modern and mature IAM solution**

CCCApply and MyPath are built on an **antiquated framework**

CCCApply and MyPath management tools can be **complex and challenging**

Superglue is a homegrown bespoke solution that is **labor-intensive to manage**
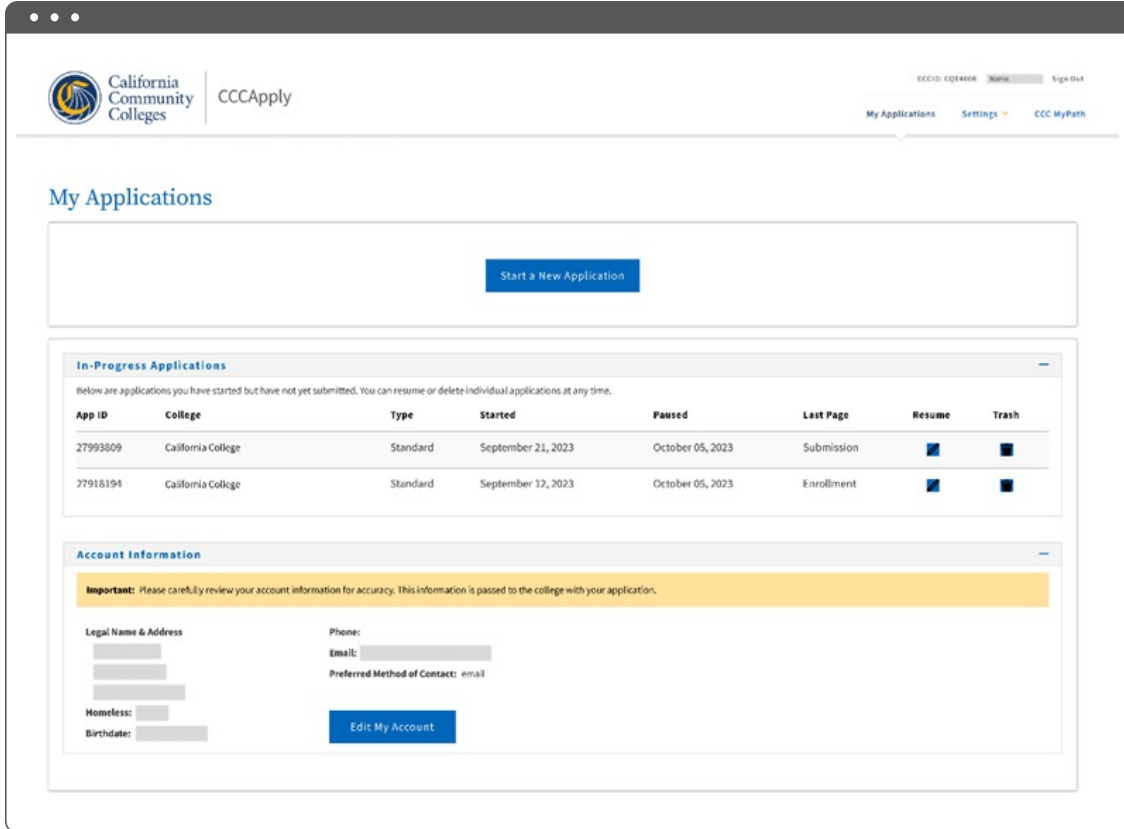
TARGET STATE

Explore **commercial cloud hosted fully-managed alternatives** to open-source and other self-managed applications

Explore a **professionally managed commercial** fraud prevention strategy

Explore a **data management solution** that enables a Reimagined CCCApply to **integrate with 3rd party and districts systems** with **bi-directional data flow**
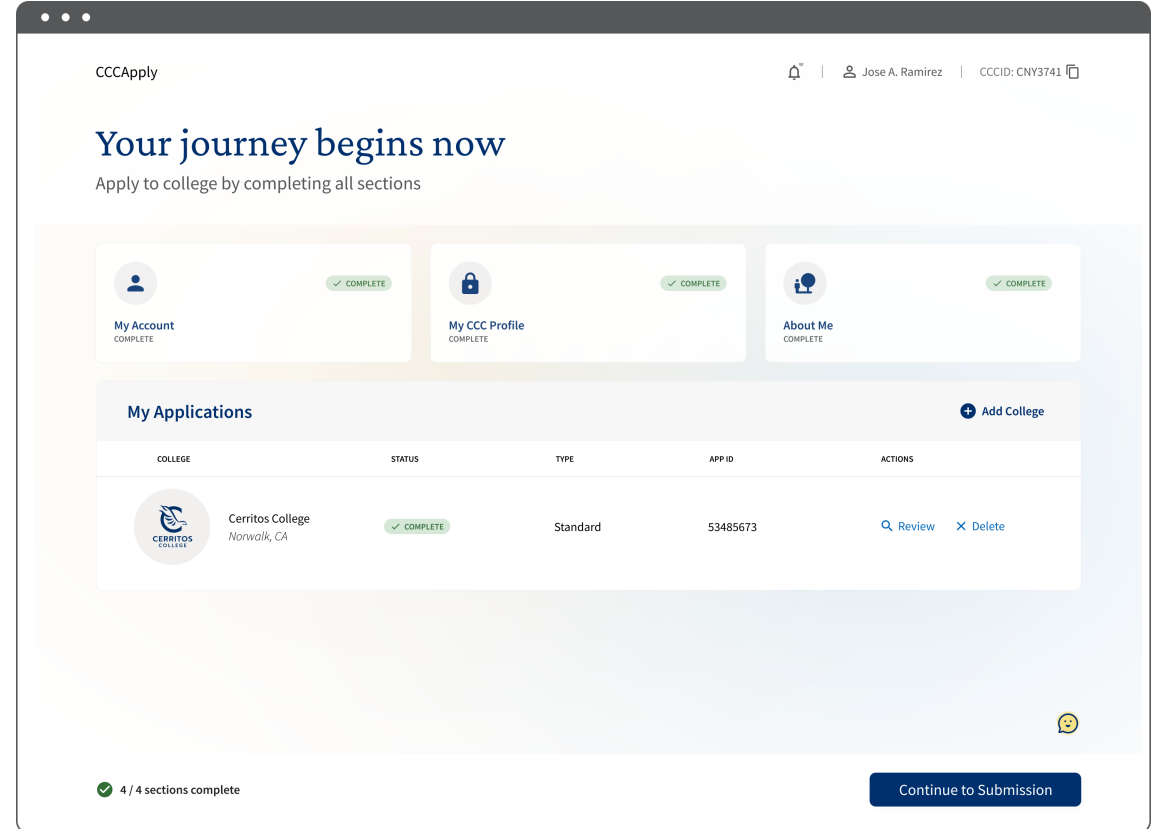
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Design In Practice

Current

Proposed

Proposed Mobile Views

Proposed Designs

Mobile Friendly
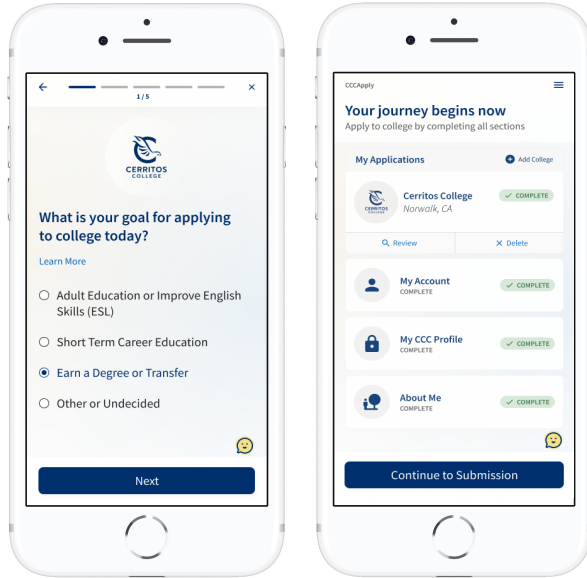
Purpose of Requirements
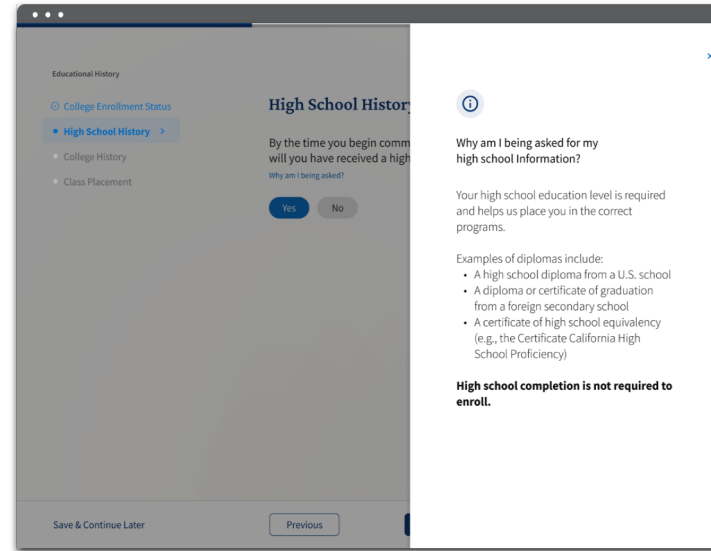
Section Labels
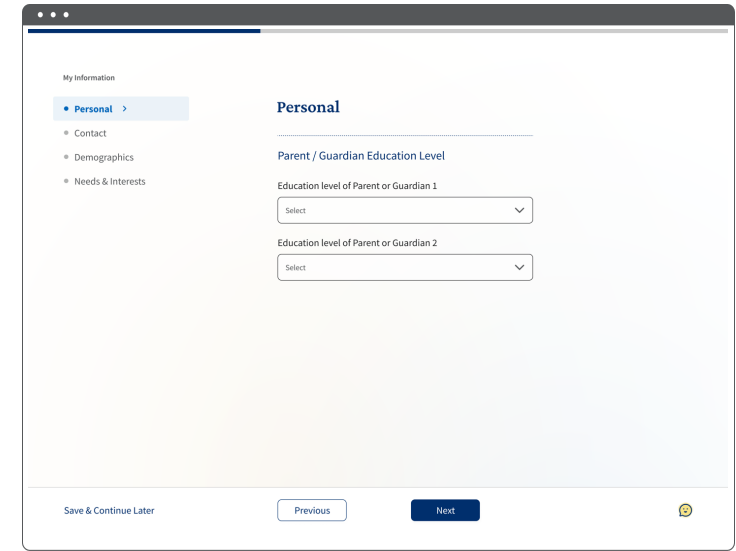
Progress Tracking
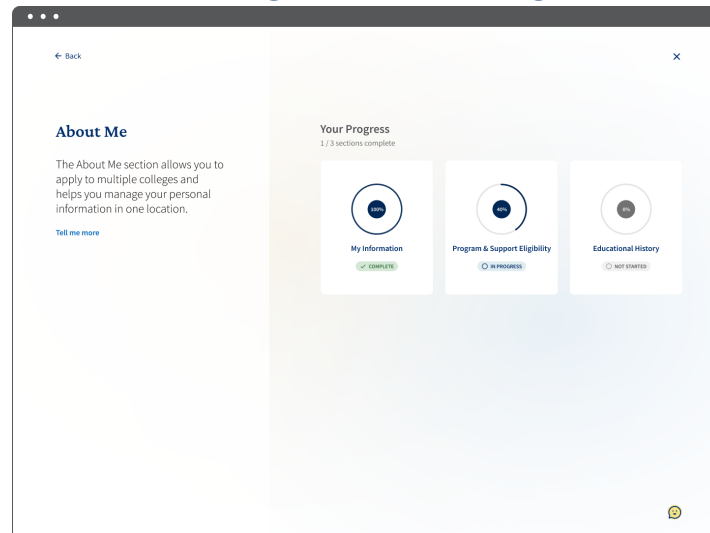
Scannable Text
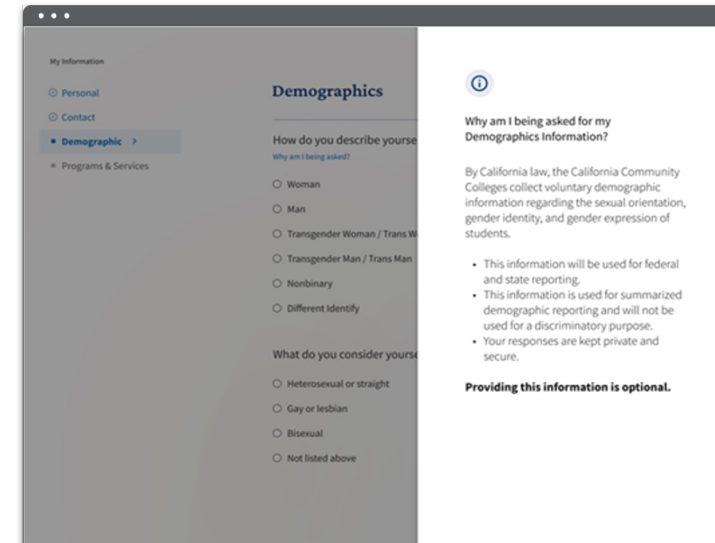
Applicant Journey – Completing CCCApply

1) Navigate to CCCApply

✅ All students fill out a single, standardized application

2) Account Creation

✅ Modernized design guides applicant through a user-friendly experience

4) Applicant Needs Support

✅ Enhanced self-help options, such as tooltips, FAQ pages, chatbot, etc.

6) App Submission

✅ Timely status updates for applicants

1.5

1.5) Paper Applications

✅ Efficient options for staff to input paper applications

3) Starting the Application

✅ Pre-populated fields via trusted data sources; improved multi-language translations

5) Additional Support Required

✅ Connect students to college staff within the application

7) Nudge Applicants

✅ Reach students through multiple channels as needed

1   2   3   4   5   6   7

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Stakeholder Journey – CCCApply Setup

1) Update Terms & Majors

✅ Stakeholders only need to update data in their SIS

3) Access Admin Console

✅ Simplify setup through a user-friendly CRM interface

5) Set Up Campaigns

✅ CRM tools offer click configuration, removing the need to code

7) Run Campaigns

✅ Stakeholders can turn campaigns on and off at the click of a button

1   2   3   4   5   6   7

2) Automated Data Import

✅ An automated data connector will sync data, minimizing human error

4) Communications Strategy

✅ Outreach campaigns can be tailored for common application issues

6) Configure Campaigns

Multichannel touchpoints can be configured into a comprehensive campaign

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Communications in the Target State

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Where We've Been & Where We're Going

2023

February — STWG Workshop #1

Context Setting

Interview Synthesis & Application Review – What We Heard & What We've Seen

Improvements Timeline

Task Force Purpose

March — STWG Workshop #2

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Short-term 'wins' in CCC Apply

Current State Personas for redesign process

April — STWG Workshop #3

Recruitment, Engagement & Communications plan for Task Force Validated

Key Milestones for Redesign Roadmap

2024

October — Working Session #1

Educational Goal

Programs & Services

Education History

December — Working Session #2

Unique Student Needs

Revised Content

Design Preview

January — Working Session #3

Target State Alignment Ideal Data Journey

Residency Challenges

February — Task Force Kick-off

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Roadmap

June — Task Force #5

TBD

August — Task Force #6

TBD

From our Task Force Kick-off