Session 23

Reporting Student Financial Aid Data to IPEDS

Archie Cubarrubia
U.S. Department of Education

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Agenda

- Overview of IPEDS
- Why Reporting is Important
- Context: HEOA Requirements
- 2009-10 Data Collection in Review
- 2010-11 Data Collection and Beyond
- Key Concepts
- Data Screens
- Resources and Tips

What is IPEDS?

- Integrated Postsecondary Education Data System
  - Annual data collection conducted by the U.S. Department of Education's National Center for Education Statistics (NCES)
  - A system of nine interrelated surveys that collects institution-level data

What is IPEDS?

Fall	Winter	Spring
• Institutional Characteristics • Completions • 12-month Enrollment	• Human Resources	• Finance • **Student Financial Aid** • Fall Enrollment • Graduation Rates • Graduation Rates 200

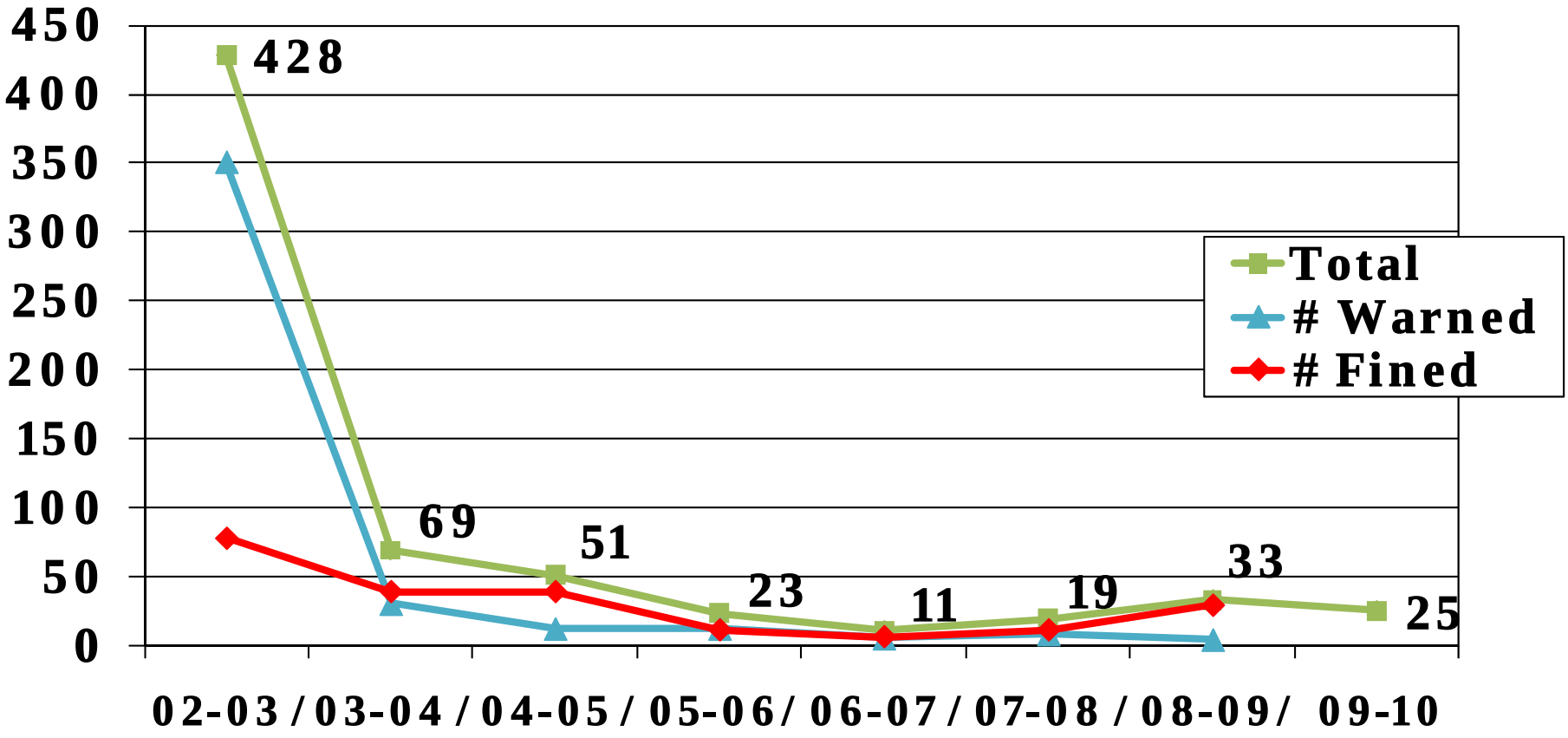
What is IPEDS?

- Required of every college, university, and technical and vocational institution that participates in the federal student financial aid programs
  - Program Participation Agreement (PPA) with the U.S. Department of Education
- Data are made publicly available to students and parents through College Navigator and to researchers and others through the IPEDS Data Center

Why is Reporting Important?

- Compliance
  - Penalties for noncompliance include
    - Fine of up to $27,500 per violation
    - Institution's eligibility to participate in Title IV programs can be suspended

Compliance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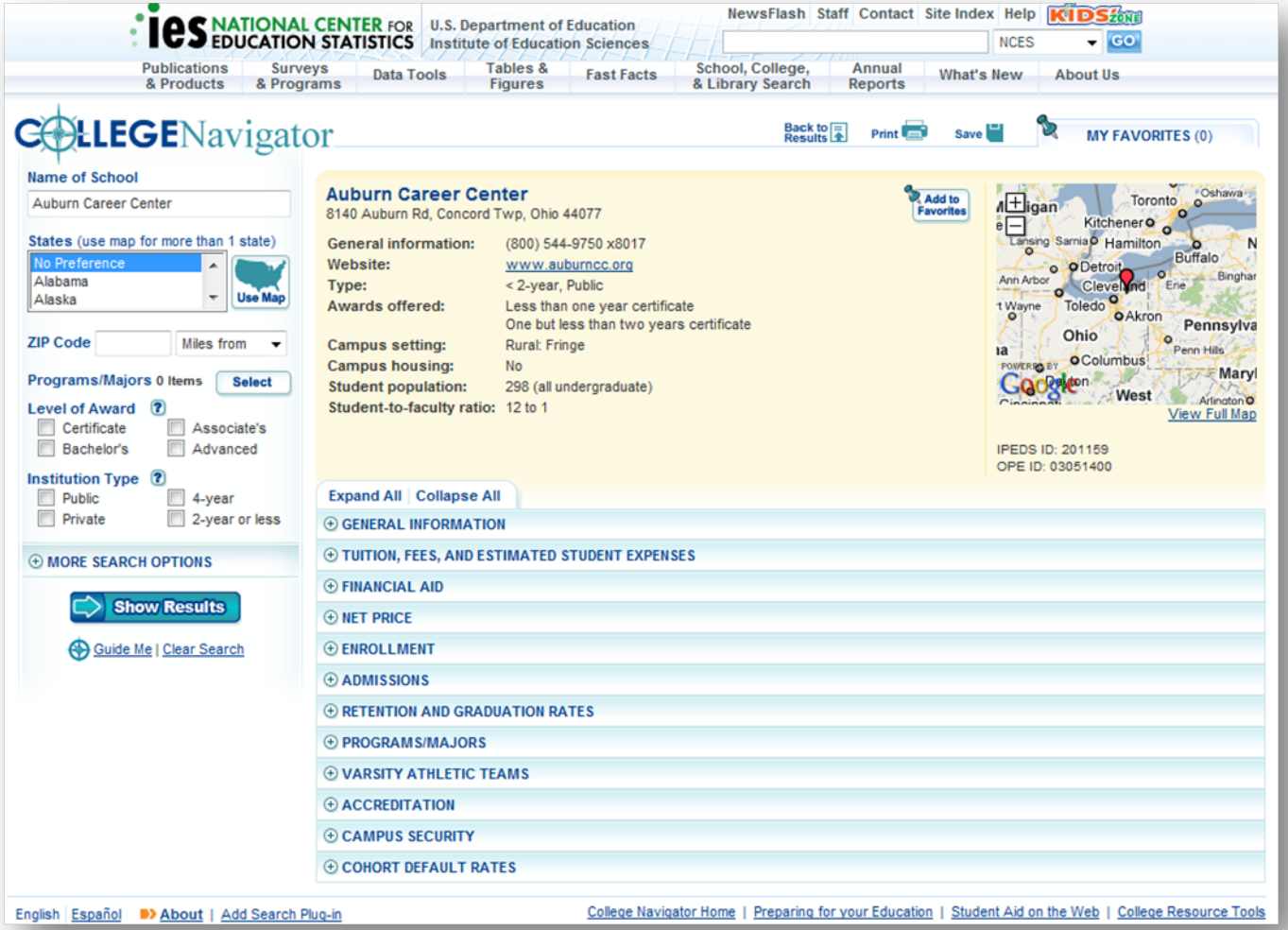
02-03 / 03-04 / 04-05 / 05-06 / 06-07 / 07-08 / 08-09 / 09-10

Why is Reporting Important?

- Assuring Quality of Information for the Public
  - Accurate data important to students and parents through College Navigator
  - Accurate data important to the institution's CEO/President through the Data Feedback Report sent annually
  - Accurate data important for use by Congress, researchers, media, policymakers, and many others through the IPEDS Data Center

For Students and Parents



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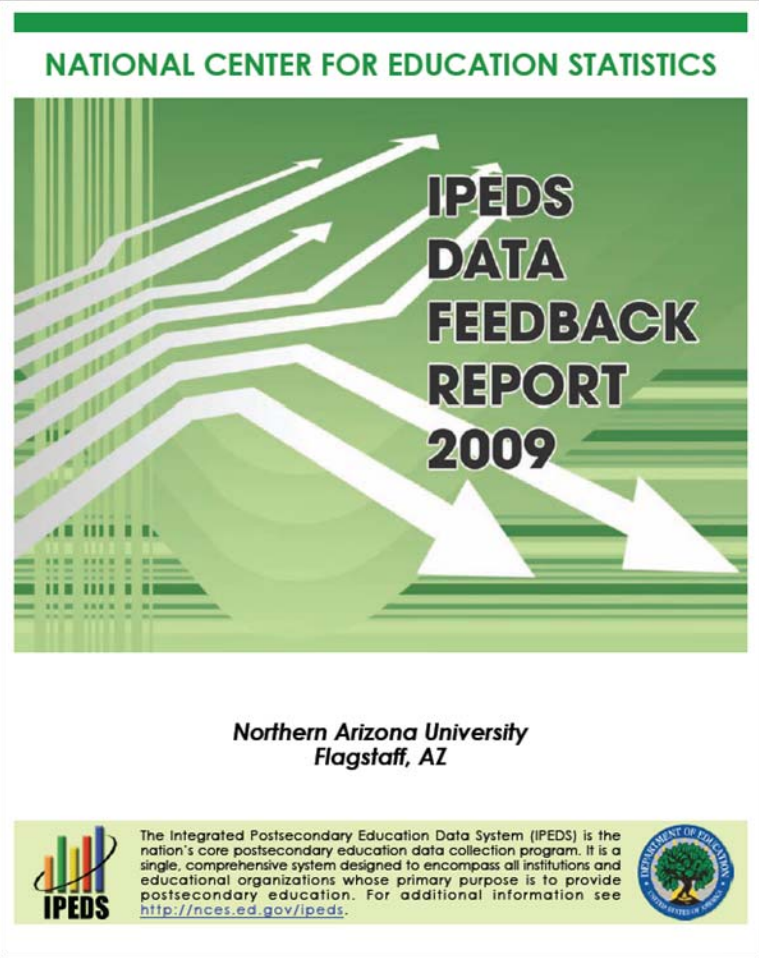
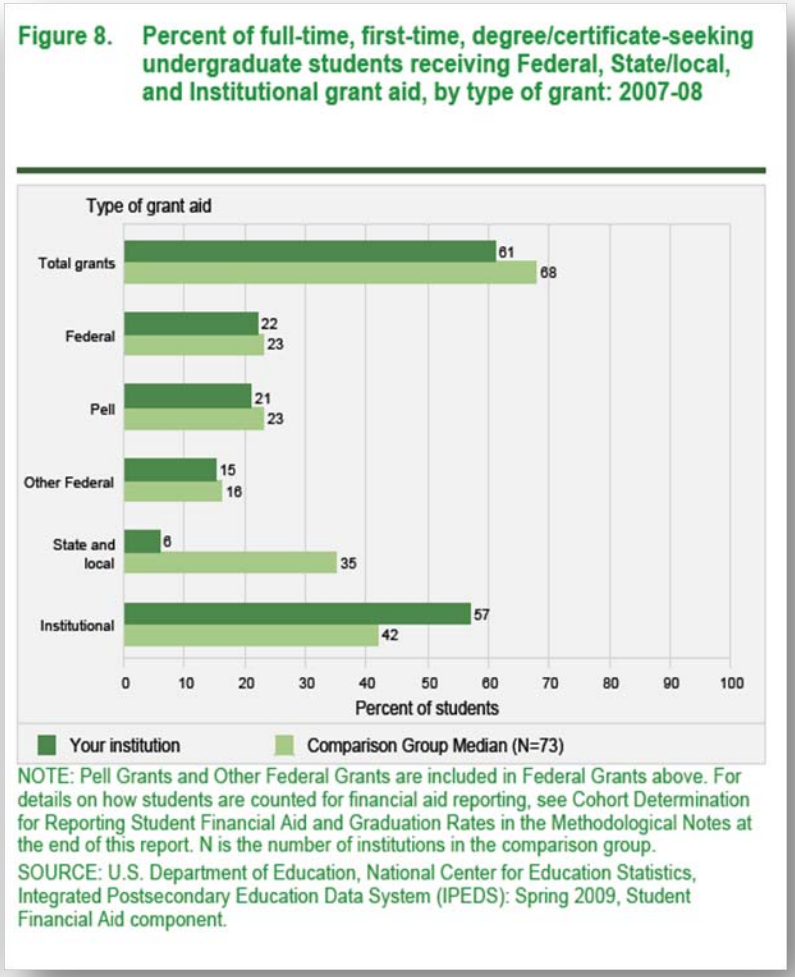
For CEOs / Presidents





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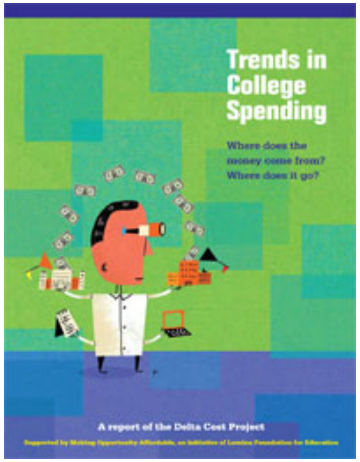
Data Used by Others

OSDS Occupational Supply Demand System

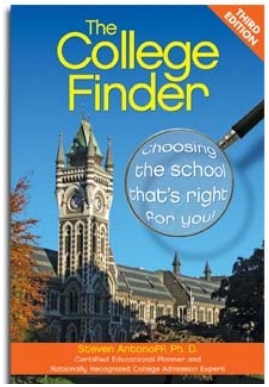
Bill & Melinda Gates foundation

CollegeBoard
connect to college success™



DELTA PROJECT
on Postsecondary Education Costs, Productivity, and Accountability

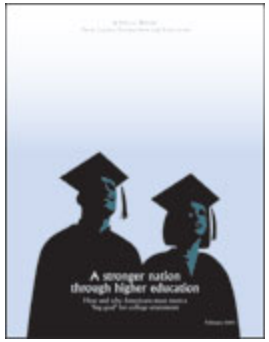
The Education Trust



U.S. News & World Report
usnews.com

PETERSON'S
A Nelnet Company

MEASURING UP 2008
THE NATIONAL REPORT CARD ON HIGHER EDUCATION



WINTERGREEN ORCHARD HOUSE

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Who is Responsible?

- IPEDS Keyholder
  - Coordinates all aspects of data submission at the institution level
  - Arranges for others at the institution to have access to the Data Collection System
  - Works with other offices to compile the necessary data for submission
  - Responsible for ensuring all of the institution's data are submitted accurately and on time
  - Responsible for locking each survey, signaling that the data are correct

Who is Responsible?

- IPEDS Coordinator
  - Responsible for state or system-level coordination of IPEDS submissions, but roles vary form state to state
- Others on campus
  - If you assist in compiling IPEDS data for your institution, you can obtain a username and password to the Data Collection System
  - Talk to your IPEDS Keyholder (IR or registrar)

Context

- Higher Education Opportunity Act (HEOA)
  - Signed into law on August 14, 2008
  - Includes many new reporting and disclosure requirements

HEOA Requirements

- Reporting: College Navigator
  - "A to Z" consumer information list
  - Multi-year tuition calculator
  - Net price data
  - College affordability lists

“A to Z” Consumer Information

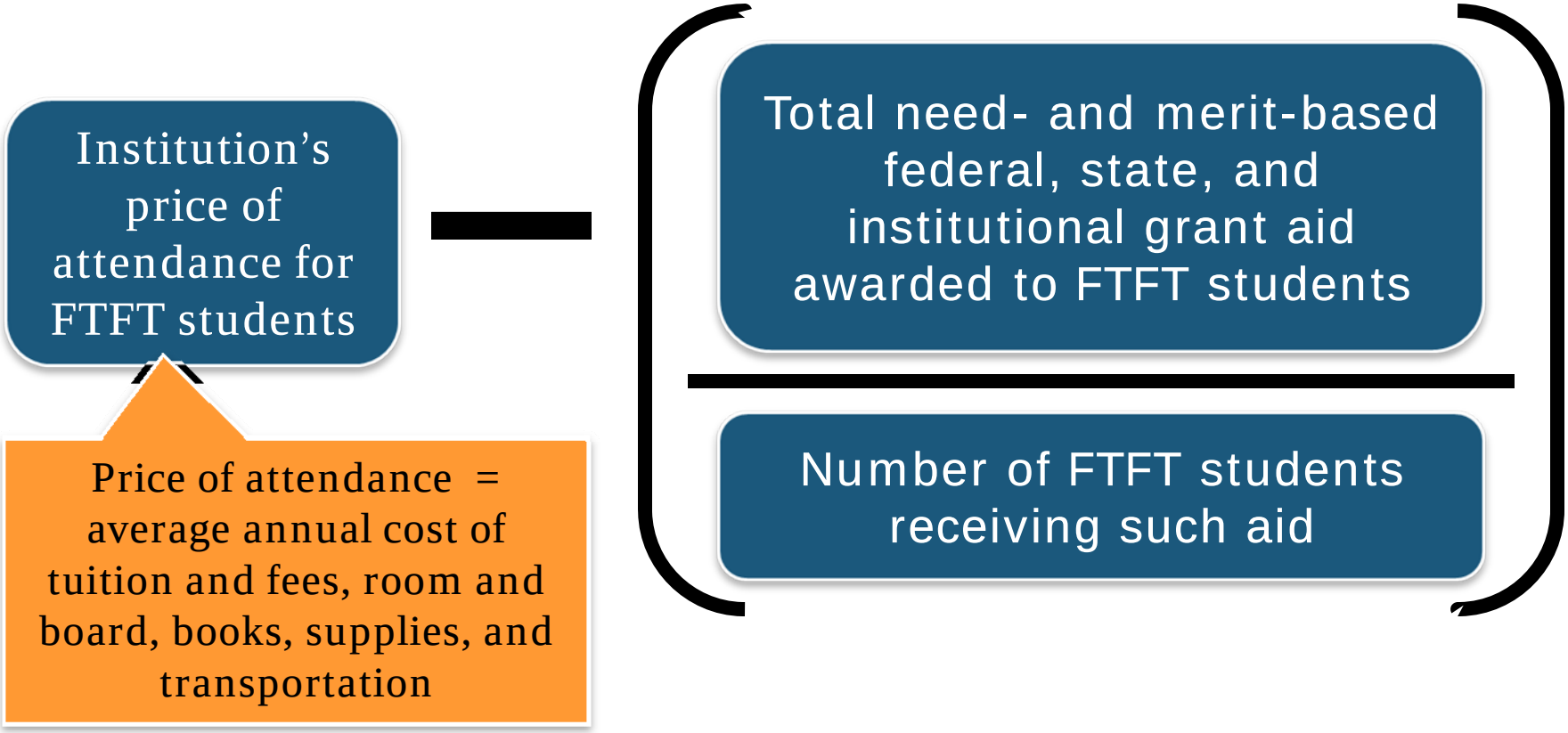
- Mission statement
- Admissions data
- Pricing data
- Completions/top areas of study
- Enrollment data by status, level, gender, R/E; transfer-in data
- Residency/migration data
- Retention rates
- Graduation rates
- Alternative tuition plans offered
- Student-to-faculty ratio
- Student financial aid:
  - Total grant aid awarded to all undergraduates
  - Total number of all students who received a Pell grant
- Students with disabilities
- 100%, 150%, 200% graduation rates

Multi-year Tuition Calculator

- Has been posted to College Navigator
- Allows users to calculate estimated tuition and fees for normal duration of a program at an institution
- Uses price of attendance data from IC component
- Determines estimated annual % change based on most recent 4 years of data

Net Price

- HEOA Definition of Net Price



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Net Price

- Three years of average net price
  - Average institutional net prices for 2006-07, 2007-08, 2008-09 are currently available on College Navigator
- One year of average net price disaggregated by income
  - Average institutional net price by income for 2008-09 is currently available on College Navigator

College Affordability Lists

- NCES must post to College Navigator by July 1, 2011 for each sector:
  - Highest tuition & fees (top 5%)
  - Highest percentage increases in tuition & fees (top 5%)
  - Highest average net price (top 5%)
  - Highest percentage increases in average net price (top 5%)
  - Lowest tuition & fees (bottom 10%)
  - Lowest net price (bottom 10%)

2009-10 Year in Review

- Spring collection was scheduled to close on 4/14
- As of 4/13
  - Help Desk was getting > 1,200 calls/day
  - Callers had to be put on hold, experienced long delays
  - Data Collection System slowed down
  - Only about ½ of all spring surveys were complete
- Spring collection was extended through 4/19

2010-11 SFA Data Collection

Registration opened	August 4, 2010
Survey materials available	August 4, 2010
SFA collection opens	December 8, 2010
SFA collection closes for keyholders	April 13, 2011
SFA collection closes for coordinators	April 27, 2011

2010-11 Improvements

- More detailed survey instructions
- Overview and summary screens
- More detailed edits and error messages
- XML uploads

- **Tip: Start early!**

Updates

- Technical Review Panel (TRP) on Improvements to the Student Financial Aid Component
  - Held September 14-15, 2010
  - Focused on clarifying key concepts and improving the reporting experience, particularly for program reporters
  - Changes resulting from the TRP will likely be implemented in the **2011-12 data collection year**

Key Concepts

- Aid Received
  - Aid awarded and accepted
- Reporter Type
  - Based on predominant calendar system:

Academic reporters	Semester, trimester, quarter, or other academic-year calendar
Program reporters	Differs by program, continuous basis

Key Concepts

- Full Aid Year (Reporting Period)

Academic reporters	2009–10 academic year
Program reporters	Calendar year between September 1, 2009 and August 31, 2010

- Cohorts

Academic reporters	Students enrolled as of October 15, 2009 or the institution's official fall reporting date
Program reporters	Students enrolled anytime between September 1, 2009 and August 31, 2010

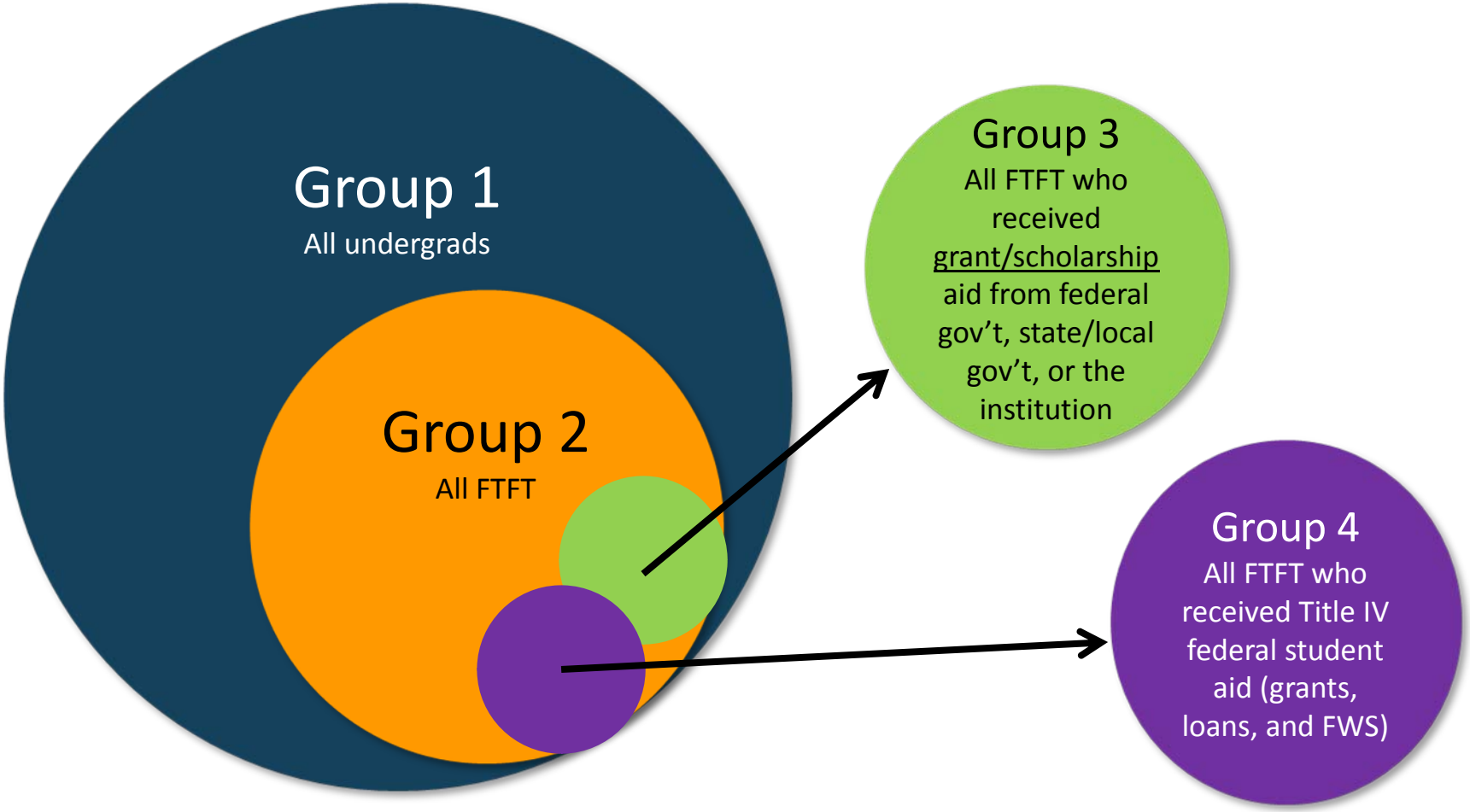
Key Concepts

- Title IV Federal Student Aid
  - Federal Pell Grant, Federal Supplemental Educational Opportunity Grant (FSEOG), Academic Competitiveness Grant (ACG), National Science and Mathematics Access to Retain Talent Grant (National SMART Grant), Teacher Education Assistance for College and Higher Education (TEACH) Grant
  - Federal Work-Study
  - Federal Perkins Loan, Subsidized Direct or FFEL Stafford Loan, and Unsubsidized Direct or FFEL Stafford Loan

Key Concepts

- Groups
  - Group 1: All undergraduates
  - Group 2: Of Group 1, full-time, first-time (FTFT) degree/certificate-seeking students
  - Group 3: Of Group 2, students who received any grant/scholarship aid from the federal government, state/local government, or the institution
  - Group 4: Of Group 2, students who received any Title IV federal student aid (grants, loans, Federal Work-Study)

Key Concepts



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Key Concepts

- Data are pulled from the IPEDS Institutional Characteristics component
  - Pricing information
  - Living arrangement options
- Data are pulled from IPEDS 12-month Enrollment component
  - Undergraduate count
- Consult the IPEDS Glossary

Before You Begin

WHAT YOU WILL NEED

- Survey instructions
- Information about each student group
- Living arrangement information for FTFT undergraduate students who received grant/scholarship aid
- Living arrangement information for FTFT undergraduate students who received Title IV federal student aid
- Income categories for FTFT undergraduate students who received Title IV federal student aid

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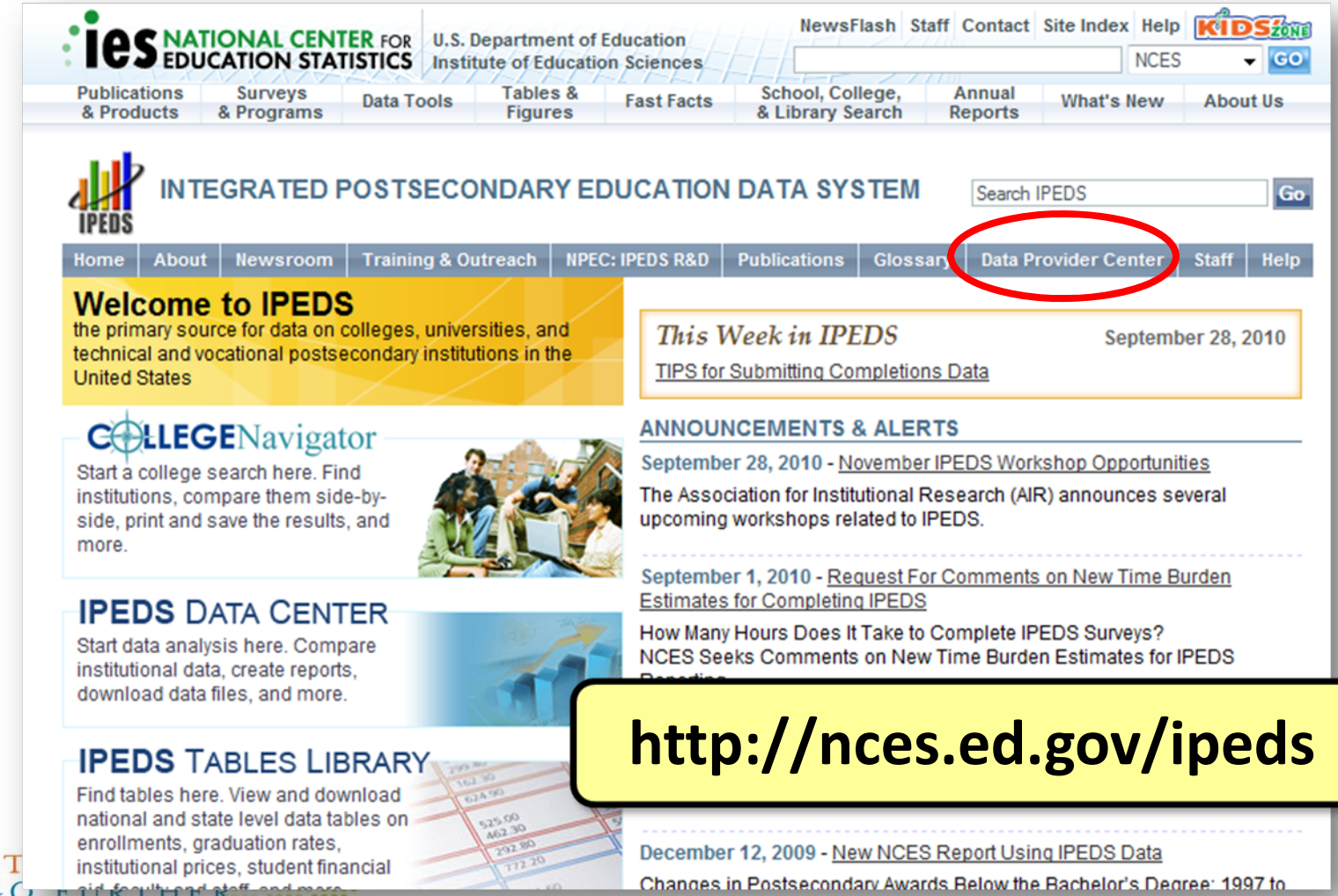
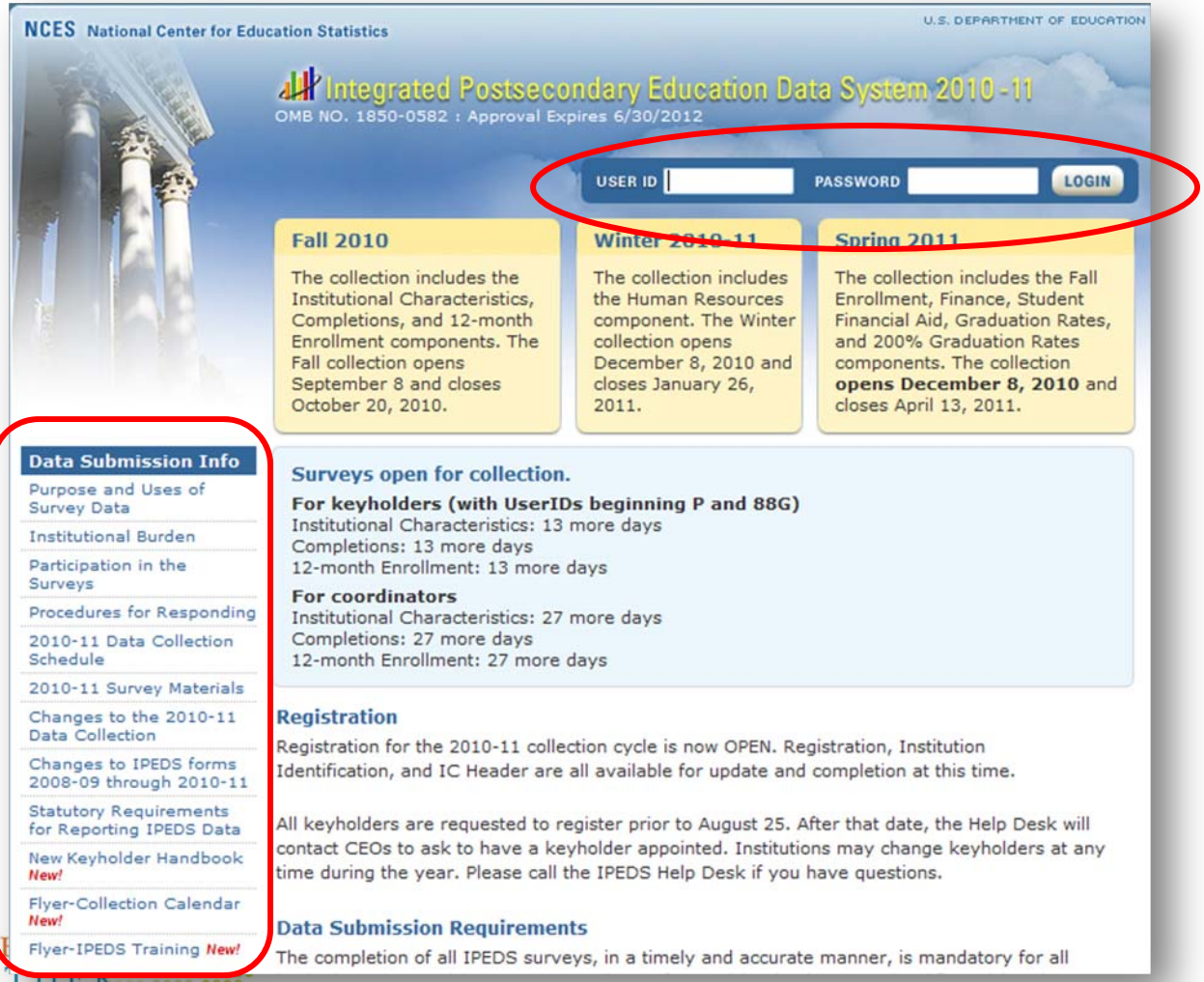
Getting Started



http://nces.ed.gov/ipeds

IPEDS Data Provider Center



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Overview

- Part A: Establish Your Groups
- Part B: Data on Group 1
- Part C: Data on Group 2
- Part D: Data on Group 3
- Part E: Data on Group 4
- Part F: Net Price Worksheet for Group 3
- Part G: Net Price Worksheet for Group 4

Part A: Establish Your Groups

In Part A, report:

- The number of students in various groups
  - Note: the values you enter on this screen will be carried forward to other parts of the Student Financial Aid component

Part A: Establish Your Groups

Group	2009-10	Prior year
01. Group 1 All undergraduates enrolled during the full aid year.		Pre-loaded
02. Group 2 Of those in Group 1, those who are full-time, first-time, degree/certificate-seeking undergraduates.		Pre-loaded
02a. Of those in Group 2, those who received any Federal Work Study, loans to students, or grant or scholarship aid from the federal government, state/local government, the institution, or other sources known to the institution.		Pre-loaded
02b. Of those in Group 2, those who received any loans to students, or grant or scholarship aid from the federal government, state/local government, or the institution.		NEW!
03. Group 3 Of those in Group 2, those who received grant or scholarship aid from the federal government, state/local government, or the institution. Exclude other sources of grants.		Pre-loaded
04. Group 4 Of those in Group 2, those who received Title IV federal student aid.		Pre-loaded

Part B: Data on Group 1

Group 1 students are all undergraduates enrolled…

For academic reporters:

As of October 15, 2009 or the institution's official fall reporting date

For program reporters:

Anytime between September 1, 2009 and August 31, 2010

Part B: Data on Group 1

- For this part, report:
  - Financial aid received by Group 1 students from all sources: federal government; state/local government; your institution; other sources known to the institution
  - Financial aid received by Group 1 students during the full aid year

Part B: Data on Group 1

Aid Type	Number of students receiving aid	% of students receiving aid	Total amount received by students	Average amount received by students
01. Grant or scholarship aid from the federal government, state/local government, the institution, or other sources known to the institution		Calculated		Calculated
02. Pell grants		Calculated		Calculated
03. Federal student loans		Calculated		Calculated

Part C, Page 1: Data on Group 2

Group 2 students are full-time, first-time degree/certificate-seeking undergraduate students enrolled...

For academic reporters:

As of October 15, 2009 or the institution's official fall reporting date

For program reporters:

Anytime between September 1, 2009 and August 31, 2010

Part C, Page 1: Data on Group 2

Information from Part A	Number of students in 2009-10	% of total number in 2009-10	% of total number in 2008-09
01. Group 1 All undergraduate students enrolled during the full aid year. (This number is carried forward from Part A, Line 01.)	Calculated	Calculated	Calculated
02. Group 2 Full-time, first-time degree/certificate-seeking undergraduates enrolled during the full aid year. (This number is carried forward from Part A, Line 02.)	Calculated	Calculated	Calculated
02a. Of those in Group 2, those who received any Federal Work Study, loans to students, or grant or scholarship aid from the federal government, state/local government, the institution, or other sources known to the institution. (This number is carried forward from Part A, Line 02a.)	Calculated	Calculated	Calculated
02b. Of those in Group 2, those who received any loans to students or grant or scholarship aid from the federal government, state/local government, or the institution (This number is carried forward from Part A, Line 02b.)	Calculated	Calculated	--

Part C, Page 1: Data on Group 2

- For public academic reporters, report:

04. Group 2 students	Number of Group 2 students in Fall 2009	Percentage of Group 2 students in Fall 2009	Percentage of Group 2 students in Fall 2009
04a. Paying in-district tuition rates		Calculated	Calculated
04b. Paying in-state tuition rates		Calculated	Calculated
04c. Paying out-of-state tuition rates		Calculated	Calculated
04d. Unknown (calculated value)	Calculated	Calculated	Calculated

Part C, Page 2: Data on Group 2

- For this part, report:
  - Unduplicated student counts **within** a given aid category (e.g., Pell grants)
    - However, a student can appear in more than one aid category
  - Only grant or scholarship aid received by Group 2 students from the federal government, state/local government, and from your institution
    - Do not include grant or scholarship aid from private or other sources (e.g., Rotary Club Scholarship)

Part C, Page 2: Data on Group 2

- For this part, report (continued):
  - Loans to Group 2 students from the federal government and from other sources (including private loans)
    - Do not include PLUS loans (which are made to the parent of the student)
  - Financial aid received by Group 2 students during the full aid year

Part C, Page 2: Data on Group 2

- **Notes:** Two aid categories in this section are further disaggregated into subcategories
  - Because students may receive more than one type of aid, the sum of the values you enter in the subcategories will not necessarily equal the value you enter in the aid category
  - However, the total number of students reported for the aid category cannot exceed the sum of subcategories
  - In addition, the total number of students reported for an aid category must be at least as large as the largest of those reported in a subcategory

Part C, Page 2: Data on Group 2

Types of aid	Number of Group 2 students receiving aid	% of Group 2 students receiving aid	Total dollar amount received by Group 2 students	Average amount received	PY average amount
01. Grant or scholarship aid from the federal government, state/local governments, or the institution		Calculated	Calculated = Lines 02 + 03+04	Calculated	Pre-loaded
02. Federal grants		Calculated	Calculated = Lines 02a + 02b	Calculated	Pre-loaded
02a. Pell Grants		Calculated		Calculated	Pre-loaded
02b. Other Federal grants		Calculated		Calculated	Pre-loaded
03. State/local government grants or scholarships		Calculated		Calculated	Pre-loaded
04. Institutional grants or scholarships		Calculated		Calculated	Pre-loaded
05. Loans to students		Calculated	Calculated = Lines 05a + 05b	Calculated	Pre-loaded
05a. Federal loans		Calculated		Calculated	Pre-loaded
05b. Other loans		Calculated		Calculated	Pre-loaded

Part D: Data on Group 3

Group 3 students are all full-time, first-time degree/certificate-seeking undergraduate students enrolled anytime during the full aid year who received grant or scholarship aid from the federal government, state/local government, or the institution.

For public academic reporters: Group 3 students are all full-time, first-time degree/certificate-seeking undergraduates who pay the in-state or in-district tuition rate and who received grant or scholarship aid from the federal government, state/local government, or the institution.

Part D: Data on Group 3

- For this part, report:
  - Only grant or scholarship aid received by Group 3 students from the federal government, state/local government, and from your institution. Do not include grant or scholarship aid from private or other sources (e.g., Rotary Club Scholarship)
  - Financial aid received by Group 3 students during the full aid year
  - Living arrangement information (on-campus, off-campus with family, off-campus not with family) for Group 3 students

Part D: Data on Group 3

	2009-10	2008-09	2007-08
01. Number in Group 3	Pre-loaded from Part A	Pre-loaded	Pre-loaded
02a. Number of Group 3 students living on-campus		Pre-loaded	Pre-loaded
02b. Number of Group 3 students living off-campus with family		Pre-loaded	Pre-loaded
02c. Number of Group 3 students living off-campus not with family		Pre-loaded	Pre-loaded
02d. Unknown living arrangement	Calculated	Pre-loaded	Pre-loaded
03. Total grant/scholarship aid received by Group 3 students from the federal government, state/local government, or the institution. Exclude other sources of aid.		Pre-loaded	Pre-loaded
04. Average total grant/scholarship aid received by Group 3 students from the federal government, state/local government, or the institution. Exclude other sources of aid.	Calculated	Pre-loaded	Pre-loaded

Part E: Data on Group 4

Group 4 students are all full-time, first-time degree/certificate-seeking undergraduate students enrolled during the full aid year who received Title IV federal student aid.

For public academic reporters: Group 4 students are all full-time, first-time degree/certificate-seeking undergraduates who pay the in-state or in-district tuition rate and who received Title IV federal student aid.

Part E: Data on Group 4

- For this part, report:
  - Dollar amounts for grants and scholarships from the federal government, state/local government, or the institution received by Group 4 students
    - Do not include grants or scholarships from private or other sources (e.g., Rotary Club Scholarships) and do not include loan dollar amounts
  - Financial aid received by Group 4 students during the full aid year
  - Living arrangement information (on-campus, off-campus with family, off-campus not with family) for Group 4 students
  - The number of Group 4 students by income level

Part E: Data on Group 4

	2009-10
01. Number of first-time, full-time degree/certificate-seeking undergraduates who received Title IV federal student aid	Pre-loaded from Part A
02a. Number of Group 4 students living on-campus	
02b. Number of Group 4 students living off-campus with family	
02c. Number of Group 4 students living off-campus not with family	
02d. Unknown living arrangement	Calculated

Income level	Number of Group 4 students receiving any Title IV federal student aid	Total amount of grant/scholarship aid received by Group 4 students	Average amount of grant/scholarship aid received
$0-30,000			Calculated
$30,001-48,000			Calculated
$48,001-75,000			Calculated
$75,001-110,000			Calculated
$110,001 or more			Calculated

Parts F & G: Average Net Price

- Net Price Worksheets
  - Will show calculation of net price for Group 3 and net price by income level for Group 4
- Context boxes allow respondents to provide contextual information about the data reported
  - Context boxes are optional
  - Text in many context boxes are published on College Navigator

Edits and Error Checks

- Confirmation
- Explanation
- Fatal

Resources

- If you do not have a log in:
  - IPEDS Help Desk
  - Training
  - Data Provider Center: Survey materials (forms, instructions, glossary, FAQs, narrative edits, import specifications)
- Additionally, if you do have a log-in:
  - Access to Data Collection System and survey screens
  - Links to glossary terms within survey screens

IPEDS Help Desk

- Phone: 1-877-225-2568
- E-mail: ipedshelp@rti.org

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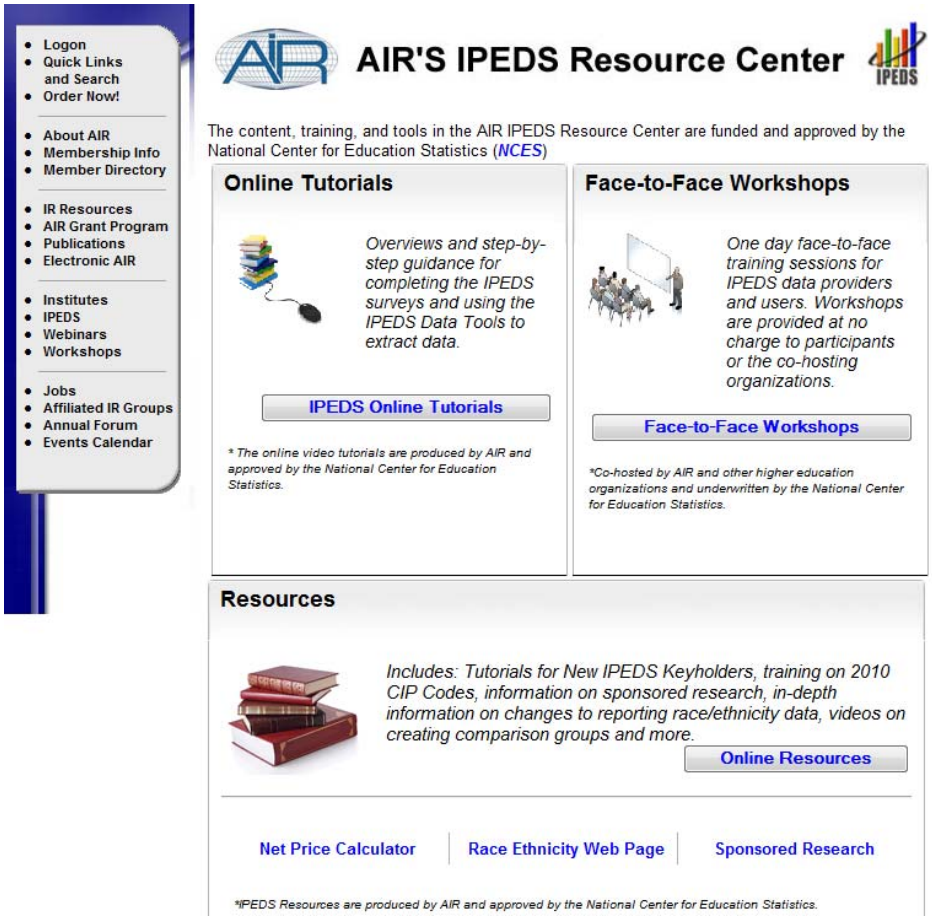
AIR Training

AIR Training



Tips

- Start early
  - SFA survey materials became available on August 4, 2010
  - Data collection opens on December 8, 2010
  - Deadline for keyholders is April 13, 2011
  - Gather the required data elements as soon as they're available

Contact Information

We appreciate your feedback and comments. We can be reached at:

Archie Cubarrubia
Phone: 202-502-7601
E-mail: Archie.Cubarrubia@ed.gov

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