

# Report and Suggestions from IPEDS Technical Review Panel #36 Collecting Data on Veterans

**SUMMARY:** The Technical Review Panel suggests collecting information on veterans and military service members and the use of education benefits in order to capture data necessary for policy making and analysis, while also improving information available to veterans and military service members considering postsecondary education. Comments from interested parties are due to Janice Kelly-Reid, IPEDS Project Director at RTI International, at [ipedstrpcomment@rti.org](mailto:ipedstrpcomment@rti.org) by March 7, 2012.

On November 8–9, RTI International, the contractor for the Integrated Postsecondary Education Data System (IPEDS) web-based data collection system, convened a meeting of the IPEDS Technical Review Panel (TRP) in Washington, DC. Meetings of the IPEDS TRP are conducted by RTI to identify technical improvements to the IPEDS data collection and dissemination, as well as to foster communication with data providers and users. The purpose of this meeting was to solicit input from the postsecondary education community regarding collecting data on veterans. The panel consisted of 43 individuals representing data providers and users including the federal government, state governments, institutions, association representatives, and others. Many of these either directly represented veterans organizations or represented institutions enrolling a large number of veterans and military service members. The TRP assessed the availability of data to effectively meet the needs of this population as well as policymakers and researchers and discussed the feasibility of collecting data on veterans and service members through IPEDS.

## Overview

Since the Post-9/11 Veterans Educational Assistance Program (Post-9/11 GI Bill) went into effect in August 2009, there has been dramatic growth in both the number of beneficiaries and benefits payments under the program to support study at postsecondary institutions. In fiscal year 2010, over \$5 billion in education benefits were expended for the Post-9/11 GI Bill alone. An additional \$3 billion supported the remaining education benefit programs (e.g., Montgomery GI Bill, Military Tuition Assistance Program). The U.S. Department of Veterans Affairs (VA) supported over 800,000 students through its education benefits programs, and the Department of Defense (DoD) aided almost 400,000 through its Military Tuition Assistance Program (TA).

**Table 1. Overview of key veterans education benefits programs**

<b>Program</b>	<b>Benefit</b>
Post 9-/11 Veterans Educational Assistance Program (Post-9/11 GI Bill)	<ul style="list-style-type: none"><li>• Effective August 1, 2009</li><li>• Tuition and fees, monthly housing allowance, and books and supplies stipend</li><li>• Can transfer educational benefit to dependent</li><li>• Program expanded in 2011 to cover non-degree-granting programs, apprenticeships/on-the-job training programs, flight training programs, and training by correspondence</li></ul>
Montgomery GI Bill – Active Duty(MGIB-AD)	<ul style="list-style-type: none"><li>• First entered active duty on or after June 30, 1985</li></ul>
Montgomery GI Bill – Selected Reserve (MGIB-SR)	<ul style="list-style-type: none"><li>• Funded by Department of Defense and administered by Veterans Administration</li></ul>
Reserve Educational Assistance Program (REAP)	<ul style="list-style-type: none"><li>• National Guard and Reserves serving in support of a contingency operation under federal authority on or after September 11, 2001</li></ul>
Survivors and Dependents Educational Assistance (DEA)	<ul style="list-style-type: none"><li>• Designed for spouses and children of veterans who died or were disabled in service</li></ul>
Post-Vietnam Era Veterans Educational Assistance Program (VEAP)	<ul style="list-style-type: none"><li>• First entered active duty after December 31, 1976, and before July 1, 1985</li></ul>
Tuition Assistance Program (TA) and Tuition Assistance Top-Up Program	<ul style="list-style-type: none"><li>• Administered by the Department of Defense</li><li>• For active duty service members, reservists called to active duty, and their spouses</li><li>• GI Bill benefits can be used to supplement costs not covered by this program</li></ul>

The increase in beneficiaries and federal dollars expended has led to demand for more information for (1) researchers to study the impact of these programs on college participation and success; (2) institutional researchers and other data users to conduct peer comparison in serving these students; (3) veterans and military service members looking to use their educational benefits; and (4) policymakers to assess the effectiveness of benefits programs and return on investment. The following exhibit presents the type of questions in which the different stakeholders have expressed interest.

Veterans/Service Members	Institutions	Policymakers/Researchers
Where do other veterans enroll?	How does our veteran population compare to other institutions?	What institutions are veterans attending and for what purposes?
Which institutions provide special services for veterans?	How do the services we provide compare to other institutions?	How do these programs impact access and education attainment for veterans?
At which institutions am I more likely to be successful?	How do outcomes for veterans at my institution compare to other institutions?	What are the student outcomes?
How much will it cost me to attend/what is my net price?		What is the return on investment in the programs?

To respond to these information demands, the TRP focused on discussing possible ways to utilize already existing data and collect new information on veterans and military service members to better address policy and research questions, as well as to provide more detailed information on the number and types of students using education benefits and how these students are being served by institutions.

## Discussion Item #1: Availability of Data

### Background on Federal Data

The IPEDS data collection does not currently capture information on veterans, military service members, or services offered to this student population. In light of this, the panel discussed the potential opportunities that other existing federal sources may present.

NCES is able to provide national estimates on basic demographic information on veterans and service members through its large-scale, nationally representative samples of institutions and students such as the National Postsecondary Student Aid Survey (NPSAS). NPSAS is conducted every 4 years and is the primary source of information used by the federal government (and others, such as researchers and higher education associations) to inform public policy on student financial aid programs such as the Pell grants and Stafford loans. Further, NPSAS is used to obtain baseline data for longitudinal study of student subpopulations. Specifically, NPSAS data provide the base-year sample for the Beginning Postsecondary Students (BPS) longitudinal study. BPS, conducted every 8 years, follows students over time to examine such issues as persistence and the effects of financial aid on subsequent enrollment.

Although NPSAS and BPS can provide national estimates on basic demographics of veterans and military students, the small sample size for this population makes further analysis statistically unreliable. Further, NPSAS and BPS are nationally representative, but not state representative, nor can they provide institution-level data. In addition, the most recent iteration of NPSAS was in 2007-08—prior to the creation of the Post-9/11 GI Bill. Therefore, the periodicity, combined with the limitations of the sample size for this population, prevent NPSAS and other subpopulation longitudinal studies from providing immediate answers to policy questions and useful and meaningful measures to consumers.

The panel discussed whether any other federal agency captures data on veterans related to postsecondary education. VA does capture data on veterans and military service members, specifically (1) which students are certified to receive benefits; (2) the date a student begins using

benefits; and (3) the date a student stops using benefits. Therefore, the panel agreed that it would make sense to consider the possibility of utilizing the existing VA data to address questions around the number of students receiving benefits and total benefit dollars received.

### **Background on Institution Data**

Prior to the Post-9/11 GI Bill, education benefits were paid directly to students in the form of a monthly stipend. Institutions were not responsible for administering benefits, making it unlikely that they had the information necessary to track benefits and identify beneficiaries.

The Post-9/11 GI Bill has changed the role of an institution in administering benefits. Tuition and fee benefits under the Post-9/11 GI Bill are paid directly to the institution, while the monthly housing allowance, books and supplies stipend, and rural relocation payment paid directly to the student by the VA. The VA determines student eligibility and works with the School Certifying Official (SCO) at each institution to have the student's enrollment certified and administer benefits. Because the tuition and fee portion of the benefit is paid directly to the institution, institutions have the information necessary to identify Post-9/11 GI Bill beneficiaries and can also amount of benefits received for tuition and fees. To better understand the availability of data at the institution level and the systems in place across campuses, panelists were asked to comment on the information available at their institutions. Responses varied across institution types and sectors.

### **Discussion**

The panel agreed that in order to capture useful data related to veterans, it would first be necessary to more clearly determine how state and institutional data systems identify veterans. In the absence of a mandated approach, methods vary by state and by institution. Most commonly, data systems identify veterans only when they use veteran's education benefits. Using available data the SCO can identify the beneficiary, the type of benefit used, and whether the student is a spouse or dependent of a veteran or service member (i.e., using transferred benefits). However, panelists noted that for VA benefits other than the Post-9/11 GI Bill benefits, some state and institution systems are only able to identify veterans that have been certified to receive VA benefits and are unable to determine if the student actually received the benefit. Other institutions supplement any information they may have through the administration of benefit programs and further define veterans as students who self-identify as veterans, indicate veteran status on the Free Application for Federal Student Aid (FAFSA), transfer military credits, or some combination of these. The panel acknowledged that one of the main issues associated with this approach is that the count of veterans will likely be underreported as some veterans will choose not to self-identify. Further, the sources used to determine veteran status are not consistent across institutions.

Being able to define veterans in a way that is consistent across institutions and state systems presents a challenge.

## **Discussion Item #2: Collecting the Data in IPEDS**

### **Background**

After determining that the existing source of data that may assist in answering some of the data demands is data maintained by the VA, the panel was asked to consider whether it makes sense to incorporate any existing data and the collection of any new data on veterans into IPEDS in order to address changing policy, research, and consumer needs. Incorporating data into IPEDS would allow for any new data on veterans to be displayed on College Navigator, the Department of Education's college search tool for prospective students, as well as to be available to researchers and

policymakers through the IPEDS Data Center. Specifically, the panel was asked to assess the feasibility of improving the IPEDS data collection in the following areas:

- enrollment data on veterans and service members;
- degrees/certificates awarded to veterans and service members;
- retention rates for a veterans and service members subcohort;
- graduation rates for a veterans and service members subcohort;
- services available for veterans and service members at the institution;
- the use of educational benefits and the subsequent impact on institutional net price for veterans and service members.

## **Discussion**

While the panel agreed to that incorporating data on veterans and military service members into IPEDS makes sense and that such data would be useful to stakeholders and easily accessible through IPEDS data tools, the panel was concerned with meeting the information and assessment needs of prospective students and policymakers, while imposing the least amount of institutional burden. Some measures, such as information on special services and tuition programs for veterans, are important to prospective students when choosing a college. Other measures are useful to policymakers for assessing whether education benefits facilitate college participation and success. For all stakeholders, knowing the number of veterans and military service members in postsecondary education programs is important. Therefore, the panel was asked to consider how information on veterans and military service members might best be collected through IPEDS surveys or other federal sources of data.

### **Institutional Characteristics (IC) Survey Component**

To address the demand for consumer data, the panel considered data items for addition to the IC component that could be useful to prospective veteran and military service member students as a first step in helping them compare institutions. The panel acknowledged that there are a broad range of programs available for veterans academically, financially, and socially. Given the amount of variation that exists within service and support programs and across institutions, the panel determined that it is important to capture data on these programs at the most general level.

To prevent a possible duplication of effort by the institution in reporting data on student services, the panel examined existing sources (e.g., institution or state data systems and voluntary data collections). For example, a panelist noted that institutions can be granted “military friendly” designation if specific criteria are met and institutions can self-report on a series of program and service offerings related to veteran and military service member students. While the panel recognized the importance of these measures, there was concern that an indicator of “military friendly” on College Navigator will appear as an endorsement of program quality by NCEES. Instead, the panel focused on collecting data on veterans and military service members through two questions in IC: (1) programs related to veteran and military student services and (2) tuition policies available for veterans and military service members.

The panel noted that the resulting list is not intended to represent all programs available at institutions but instead to provide prospective students with a first look at the availability of such programs. To determine eligibility for specific programs, prospective students should contact the institution directly.

To best capture data on programs related to veteran and military student services, the panel suggested adding the following question to IC and providing clarification to the terms in the instructions:

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**Suggested IPEDS Data Element**

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Which of the following is available to veterans, military service members, or their families?

- Credit for military training
  - Dedicated point of contact for support services for veterans, military service members, and their families
  - Recognized student veteran organization
  - Member of Servicemembers Opportunity Colleges
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Next, the panel discussed tuition policies and noted that these policies are prone to variation, specifically in-state tuition for nonresident veterans and military service members. Given the complexities, the panel suggested including a simple checkbox for tuition differential. This would allow institutions to report tuition policies not already collected and would prompt institutions to describe the specific differential tuition policies in the context box. The panel suggested that NCES provide examples of tuition differentials in the instructions to facilitate accurate and thorough reporting.

The panel also discussed collecting the URL of the page specific to policies effecting veterans and military service members on institutions' websites with a note to contact the institution for further information. This approach would allow institutions to link to tuition policies related to veterans and service members and would decrease the volume of information reported in the context box. Panel members noted that the link is intended to be a supplementary piece of consumer information and should be collected *in addition to* information about specific tuition policies. There was concern that this approach would prevent prospective students from making side-by-side institutional comparisons in College Navigator. While the group consensus was that it would be preferable to make reporting this information available but not required, panel members did not come to a consensus whether IPEDS should collect and post to College Navigator the institutions' website at this time. Because the TRP did not reach consensus, NCES would appreciate additional comment on this topic.

To best capture data on programs related to tuition policies, the panel suggested adding the following question to IC and providing clarification on the terms in the instructions:

## Suggested IPEDS Data Elements

Which of the following do you offer to veterans, military service members, or their families?

- Institution participates in Post-9/11 Yellow Ribbon Program (link to VA website)
- Military tuition waivers
- Tuition deferment
- Tuition differential

Provide optional context box for institutions to share additional information to be posted on College Navigator

URL for tuition policies specifically related to veterans and military service members

For institutions to report on veterans services and tuition, the keyholder may rely on various institutional offices (e.g., student services, veterans affairs) to complete or assist in gathering data. To reduce the keyholder burden, the TRP suggested grouping the two consumer information questions and collecting them separately as a new Section F in IC. This would allow the keyholder to send the assisting institutional office an entire survey section rather than a list of items located across different survey sections.

Next, the panel examined the broader concept of collecting veteran and military service enrollment data to provide context and capture information that would be useful not only to students but also to policymakers. The panel agreed that there needs to be a balance between meeting the demand for data and imposing undue level of burden on institutions. Panelists agreed that the best way to address the issue of burden is by making it easier for institutions to report on veteran enrollment.

Consequently, the panel suggested that IC collect the number of undergraduate and graduate students enrolled during the previous fall reporting period who are veterans or military service members certified to receive federal veteran/military education benefits or are known to be veterans or military service members by some other method such as self identification. As noted in the previous discussion, institutions and state systems use various methods to identify veterans and military service members (e.g., transcript data, self-identification, benefit certification, FAFSA). The panel noted that if the intended focus is collecting enrollment of veterans and military service members—not the number of veterans and service members certified for benefits—it is important to determine how many veteran and military service members are known to the institution. This approach is consistent with the current framework for collecting disability data in IC.

The panel suggested if this data item is added to IPEDS, the data file should show the **number** of veterans and military service members enrolled but College Navigator should show the **percentage** enrolled. This would help present information in a manner more suited to prospective students' needs.

### Student Financial Aid (SFA) Survey Component

While IPEDS currently collects data on the number of students who are awarded financial aid and the amounts awarded, no data are collected on the number of students who use veteran education benefits. Veteran education benefits are an earned benefit and were removed from the definition of “estimated financial assistance” used in the SFA survey component under HEOA provisions.

However, the increased demand for information on the availability and use of veteran educational benefits prompted the TRP to consider two approaches for collecting information on benefits in SFA, as described below.

***Option 1: VA could provide information to institutions***

Under this approach, VA would provide data to institutions (by facility code) on the number of recipients of benefits for each program and total dollars distributed. The institution would aggregate the data (if it has multiple facility codes) to the IPEDS Unit ID to report to IPEDS. Institutions report in SFA (collected in winter on the previous award year):

- Number of undergraduates receiving *any* VA benefit (unduplicated count of beneficiaries)
- Number of undergraduate beneficiaries by program and total dollar amount awarded to them by the program
- Number of undergraduate beneficiaries and total dollar amount of DoD Tuition Assistance

This approach would allow NCES to disseminate information for policy analysis while shifting the reporting burden from the institution. VA maintains records on all beneficiaries of veteran education benefits by birth date, sex, number of months of benefits used, amount of benefits remaining, amount of benefits provided (separated by the amount paid to the institution and the stipend provided directly to the student), and facility enrolling the benefits. Facility codes are multi-digit identifiers that represent a specific location or program that has been certified by VA to enroll benefits. At this time, data can be obtained from VA by facility code but *not* by IPEDS unit ID.

Through discussion, the panel identified the following technical issues with VA providing data to institutions for reporting to IPEDS:

- Inability of VA data to distinguish between undergraduate and graduate student beneficiaries;
- Reconciling institution facility codes used by VA and UnitID used by IPEDS;
- lack of alignment in IPEDS and VA reporting periods, fluctuating variables like overpayments and underpayments that change over time, due to the transactional nature of the data system;
- duplication of data for students who attend and receive benefits at more than one facility code; and
- inability to validate data at the institution level other than Post-9/11GI Bill benefits;



***Option 2: VA cannot provide necessary information to institutions***

The TRP suggested that if VA cannot provide the necessary data to institutions, institutions should report data to IPEDS on data available in their systems. SFA (collected in the winter on the previous award year), would collect the following:

- Number of undergraduates receiving Post-9/11 GI Bill benefits
- Tuition and fee dollar amount awarded to them through the institution
- Number of undergraduates receiving DoD Tuition Assistance
- Total amount of DoD Tuition assistance awarded to them through the institution

This approach would impose a higher level of institutional burden and would fail to capture complete information. Under this approach, benefit dollars provided under the Montgomery GI Bill and approximately 10 other aid programs would be excluded. Institutions would be able to identify all students receiving any type of VA and DoD benefits—because the institution must certify eligible students—but institutions would be unable to determine the amount awarded to and received by students.

Given the technical issues that were identified in the discussion, the panel agreed that mapping VA data to IPEDS data for reporting to IPEDS is an important method that should be explored by NCES and the VA, however it is not feasible at this time. NCES should continue to work with VA to resolve technical issues and assess the option for using this approach as a long-term solution. Therefore, the panel suggested using Option 2 at this time and collecting data directly from institutions through IPEDS.

**Completions, Retention, and Graduation Rates**

In light of the previous discussion, the panel determined that collecting additional data on completions, retention, and graduation rates of veterans and military service members in IPEDS is not feasible at this time and needs further study. There is value in collecting more detailed information on veterans and military service members to address policy questions and provide more detailed information on veteran persistence rates, graduation rates, and the number of veterans completing postsecondary programs. However, given the limitations in data systems and available data, the panel concluded that IPEDS is not the appropriate instrument for collecting these data at this time. NCES should continue to examine the extent to which student outcome measures can be addressed using other federal sources of data. Further, VA has plans to capture student outcome data in the future.

## Summary of Proposed Revisions to IPEDS IC and SFA Components

Following is a list of the changes included in the discussion sections of this report.

### CHANGES SUGGESTED BY TECHNICAL REVIEW PANEL #36

#### Additions to **IC data collection**:

- Collect the number of undergraduates enrolled during the previous fall reporting period who are veterans or military service members. This status is known to the institution because the student was certified to receive federal veterans/military education benefits or by some other identification method such as self identification.
- Collect the number of graduate students enrolled during the previous fall reporting period who are veterans or military service members. This status is known to the institution because the student was certified to receive federal veterans/military education benefits or by some other identification method such as self identification.
- Add an additional section, Part F, to ask:
  - (1) Which of the following are available to veterans, military service members, or their families?
    - Credit for military training
    - Dedicated point of contact for support services for veterans, military service members, and their families
    - Recognized student veteran organization
    - Member of Servicemembers Opportunity Colleges
  - (2) Which of the following do you offer to veterans, military service members, or their families?
    - Institution participates in Post-9/11 Yellow Ribbon Program (link to VA website)
    - Military tuition waivers
    - Tuition deferment
    - Tuition differential
  - (3) Context box to be displayed on College Navigator
  - (4) URL for tuition policies specifically related to veterans and military service members

#### Additions to **SFA data collection**:

- Collect the number of undergraduates receiving Post-9/11 GI Bill benefits and the total dollar amount of tuition and fee benefits awarded to them through the institution.
- Collect the number of undergraduates receiving DoD Tuition Assistance and the total dollar amount of DoD Tuition Assistance awarded to them through the institution.

## **Implications on Reporting Burden for Institutions**

The panel was asked to estimate reporting burden for institutions, however due to the variability of systems and available data across institutions, no burden estimate was determined. If federal data could be provided to institutions at the student level and aggregated for reporting to IPEDS, the burden associated with the additions to SFA could be minimized. However, given the technical issues associated with this approach, NCES should continue to assess the feasibility of a federal data match and incorporate other sources of data into IPEDS to improve data on veterans and reduce reporting burden for institutions. Institutions are encouraged to provide estimates of reporting burden for each component (IC and SFA) during the comment period. The estimate should include time required to review instructions, search data sources, complete and review responses, and transmit or disclose information.

## **Next Steps and Reporting Implications**

Once the TRP summary comment period has closed, RTI will review the comments and provide NCES with final recommendations based on the suggestions of the TRP. NCES will review the recommendations to determine next steps and any reporting implications for IPEDS. Before any changes are made to the IPEDS data collection, proposed changes will be submitted to OMB for information collection clearance. The next OMB package will cover the 2014-15 to 2016-17 IPEDS reporting years. NCES would plan to implement any changes based on suggestions from this TRP for the 2014-15 data collection and beyond.

## **Comments**

RTI is committed to improving the quality and usefulness of veterans' data into IPEDS. **We encourage interested parties to send any comments or concerns about this topic to Janice Kelly-Reid, IPEDS Project Director, at [ipedsTRPcomment@rti.org](mailto:ipedsTRPcomment@rti.org) by March 7, 2012.** As noted above, RTI is specifically interested in the **implications on reporting burden as well as on the quality and usefulness of the data elements** based on the proposed revisions.