

**STUDENT ASSISTANCE COMMISSION, OREGON**

**Annual Performance Progress Report (APPR) for Fiscal Year (2008-2009)**

**Proposed KPM's for Biennium (2009-2011)**

Original Submission Date: 2009

| 2008-2009<br>KPM # | 2008-2009 Approved Key Performance Measures (KPMs)   |
|--------------------|--|
| 1                  | Percentage of growth in number of privately funded scholarships awarded.   |
| 2                  | Time to complete a degree program review.  |
| 3                  | Ratio of administrative dollars to private and public Scholarship dollars awarded to students.   |
| 4                  | Number of detrimental duplication issues resolved by ODA.  |
| 5 a                | Percentage of new program proposals requiring ODA involvement – New program application denial rate.   |
| 5 b                | Total program applications processed by ODA.   |
| 6                  | Number of degree validation cases resolved by ODA.   |
| 7                  | Impact of Opportunity Grants on enrollment of eligible students.   |
| 8                  | Persistence rates over 4 years for students at 4-year institutions who are eligible and awarded an OOG.  |
| 9                  | Completion rates (graduated within 6 years) for students at 4-year institutions who are eligible and awarded an OOG.                                     |
| 10                 | Completion rates (graduated within 3 years) for students at community colleges who are eligible and awarded an OOG.                                      |
| 12                 | Percentage of students of color served by OSAC programs (i.e., disaggregate measures to track race/ethnicity of beneficiaries of OSAC program services). |
| 13                 | Completion rates for part-time students.   |

| <b>2008-2009<br/>KPM #</b> | <b>2008-2009 Approved Key Performance Measures (KPMs)</b>   |
|----------------------------|---|
| 14                         | Percent of total best practices met by the Board of Commissioners.  |
| 15                         | Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall customer service, timeliness, accuracy, helpfulness, expertise and availability of information. |

| New<br>Delete | <b>Proposed Key Performance Measures (KPM's) for Biennium 2009-2011</b>  |
|---------------|--|
| <b>DELETE</b> | <p><b>Title:</b> Percentage of growth in number of privately funded scholarships awarded.</p> <p><b>Rationale:</b></p> |
| <b>DELETE</b> | <p><b>Title:</b> Number of detrimental duplication issues resolved by ODA.</p> <p><b>Rationale:</b></p>                |
| <b>DELETE</b> | <p><b>Title:</b> Number of degree validation cases resolved by ODA.</p> <p><b>Rationale:</b></p>                       |
| <b>DELETE</b> | <p><b>Title:</b> Impact of Opportunity Grants on enrollment of eligible students.</p> <p><b>Rationale:</b></p>         |
| <b>DELETE</b> | <p><b>Title:</b> Completion rates for part-time students.</p> <p><b>Rationale:</b></p>                                 |

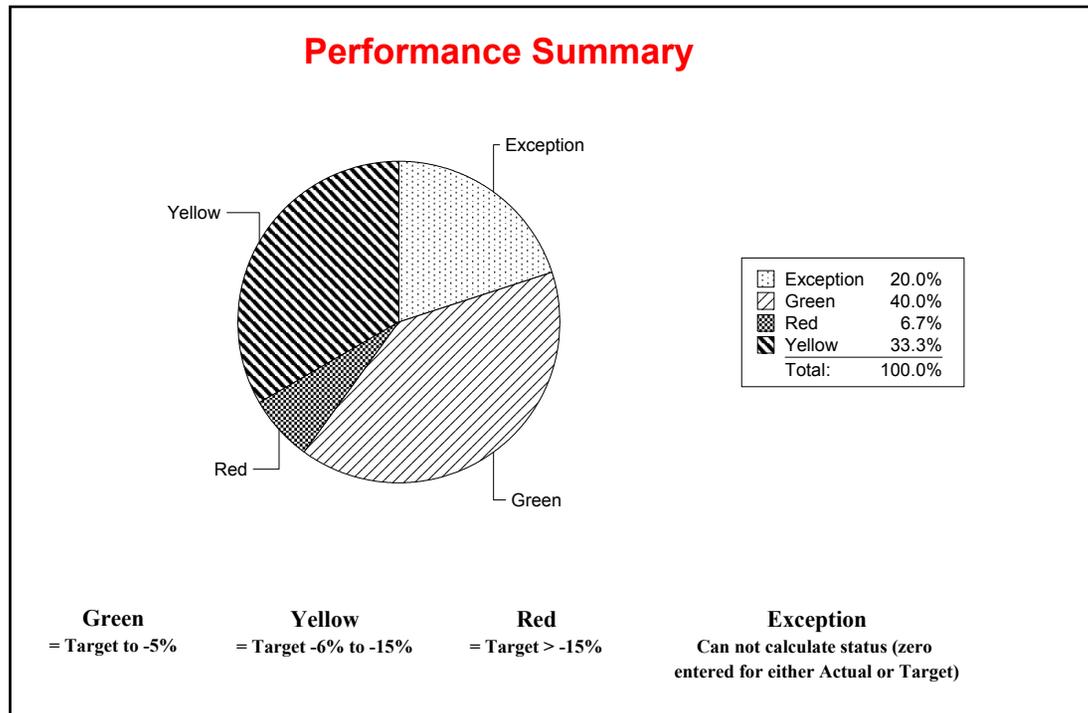
**Agency Mission:** To assist Oregon students and their families in attaining a postsecondary education and to enhance the value, integrity, and diversity of Oregon's college programs.

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**1. SCOPE OF REPORT**

Agency programs and services addressed by key performance measures:

1) The Oregon Opportunity Grant is Oregon's largest state-funded, need-based program. Each year it assists eligible students with higher education expenses. The program was established in 1971, and revised and expanded in subsequent biennia. The program's funds for the 2007-09 biennium consisted mainly of General Funds with approximately \$1.6 million in federal funds from the Federal Leveraging Educational Assistance Partnership (LEAP) program and an additional amount of Lottery funds. In 2008-09, more than 38,800 students received over \$68 million in Opportunity Grants. 2) The Office of Degree Authorization provides protection for the citizens of Oregon and for Oregon's postsecondary institutions by ensuring the quality of higher education programs and preserving the integrity of an academic degree as a public credential. 3) Scholarship and Access Programs include more than 400 student assistance programs funded by state, federal, or private sources. OSAC partners with government agencies, large foundations, financial institutions, community organizations, employers, and individual private donors to establish and implement these

programs. In 2008-09, more than 3,300 college and university students received over \$16 million through this array of programs. Agency programs and services not addressed by key performance measures: 1) ASPIRE (Access to Student assistance Programs in Reach of Everyone) is a mentoring program that helps high school students access postsecondary education opportunities. In 2008-09, ASPIRE worked in approximately 115 Oregon high schools. ASPIRE personnel are developing KPMs to track their progress. The program is already included in the OSAC customer service survey. 2) OSAC access improvements: OSAC improved access to Spanish-language materials on OSAC websites in 2005-06 and in 2006-07 began offering "Opportunities" booklets in Spanish, which assisted more Spanish language students and advisers. The College Goal Oregon website is also accessible in both English and Spanish.

## **2. THE OREGON CONTEXT**

Since the 2005-07 biennium, the picture for student financing of higher education in Oregon improved in many areas but deteriorated in others. The Oregon Employment Department reports that 87% of the new jobs to be created between 2007 and 2011 will require an associate degree or higher. The College Board and numerous other research groups have established the positive relationship between higher learning and higher-wage jobs, which lead to a higher tax base and increased state resources. There is clear evidence of higher education's return on investment, both for the individual and for the state. At the same time, however, data from OUS Institutional Research Services and the Oregon Department of Education show a decline in the rate of postsecondary participation for recent high school graduates, decreasing from a high of 23.8% in 2001-02 to 20.8% in 2004-05. The National Center for Public Policy and Higher Education reports that for every 100 Oregon students who graduate from high school, 33 went on to college, compared to a national average of 40. And, of the college-going group, only 15 will graduate, compared to the national average of 18. Issues of higher education cost, access, and affordability are critical for the state's future, and Oregon faces real challenges on all fronts. Recognizing the challenges noted above, the 2007 Legislative Assembly approved a historic overhaul of the Oregon Opportunity Grant (OOG) program, more than doubling program funding for the second half of the 2007-09 biennium for a total of \$106 million. Working in concert with colleagues from the Oregon University System, private 4-year colleges, and community colleges, OSAC continues to explore ways to expand and increase the effectiveness of the OOG program, the state's major need-based grant program for postsecondary students. This will be especially critical as college costs continue to outpace inflation and the state's college-going rates seem to be declining. In 2008-09, the first year under the new program, OSAC saw such huge increases in demand because of the economic downturn that began in late 2007 that OSAC had to suspend the awarding process at the end of November 2008, and demand continues to outpace available resources for 2009-10. Simultaneously, OSAC is working to expand the benefits of the ASPIRE program to all high schools and, ultimately, to all Oregon high school students who need them. The ASPIRE program, in conjunction with the increase in funds, was able to serve approximately 115 high schools in 2007-08. While there is additional demand from schools seeking to join the program, current funding limitations prohibit additional expansion during 2008-09. For 2007-09 biennium and again for the 2009-11 biennium, the Commission has three goals related to its mission: 1) increase Oregon Opportunity Grant funding; 2) increase the number of scholarship programs administered by OSAC; and 3) increase the number of Oregon high schools that participate in the ASPIRE program. Meeting these goals will contribute to an increase in the participation of Oregonians in higher education programs and the attainment of degrees, as highlighted by Oregon Benchmarks 24, 25 and 26. Whether it is possible to sustain programs and work toward these goals with the reduced funding available in the 2009-11 biennium remains to be seen.

## **3. PERFORMANCE SUMMARY**

OSAC's Annual Progress Report for 2006-07 contained 12 KPMs, including four new KPMs under development that were added by the 2005 Legislative Assembly. Several of these 12 KPMs were modified or deleted by the 2007 Legislative Assembly and several other KPMs were added. OSAC currently has 15 KPMs, but the 2009 Legislative Assembly approved deletion of five KPMs that did not provide useful information about OSAC's programs. Overall, a total of 12 KPMs have been added since the 2005 Legislative Session ended, but OSAC has only one or two years' worth of actual data for several of these newer KPMs. With such limited data, it is too early to identify trends or to determine with any certainty whether OSAC is making progress toward its targets. Limited data also makes it difficult to set initial targets or to determine how reasonable they are.

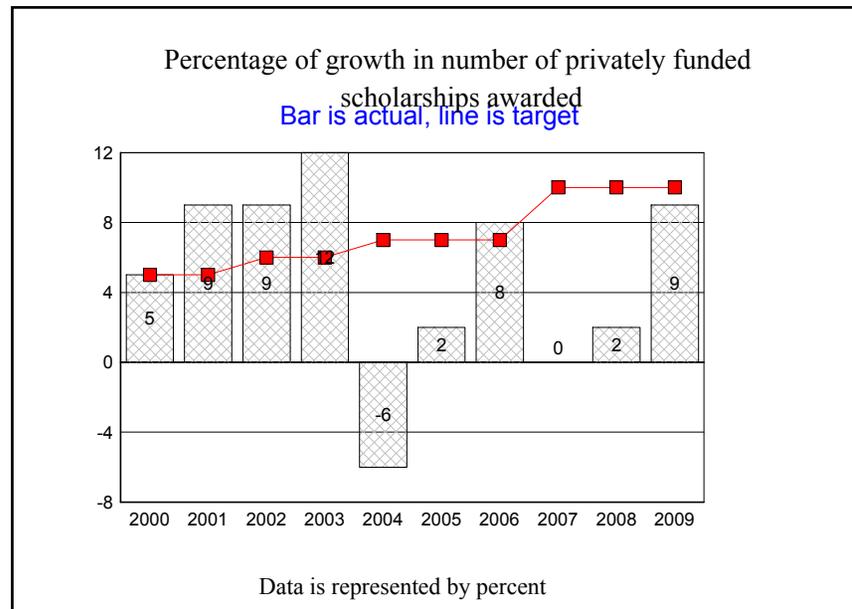
## **4. CHALLENGES**

OSAC faces challenges uniquely related to its diverse programs and the KPMs for these programs, as noted below: 1.) OSAC worked collaboratively with outside organizations and relied on its network of current donors and influencers to generate new scholarship interest until a donor relations and marketing position was added in 2008. Even in good economies, it would take several years before the results of this added position are measurable. Moreover, creating new scholarship programs becomes nearly impossible at a time when both Oregon and national economies are suffering (KPM #1, approved for deletion after the 2008-09 APPR) 2.) Through early 2009, OSAC had only two staff members in the Office of Degree Authorization (ODA), so the temporary absence of a person or a large workload had a significant effect on the length of planned reviews. Most institutions with new program proposals that require ODA involvement are able to resolve problems after an exchange of information, so the percentage of programs denied is very low. (KPMs #2, #4, #5a, #5b, #6; KPMs #4, #5a, and #5b approved for deletion after the 2008-09 APPR) 3.) Oregon is unique in supporting a successful public/private scholarship program, so finding comparable programs is a challenge. The wider world of higher education philanthropy and charitable organizations may help serve as points of reference. (KPM #3) 4.) The number of degree validation cases resolved by ODA is not a case of good or bad results, but rather the public awareness of potential fraud. "Bubbles" in the ODA caseload may also occur when the agency is notified of investigative results from federal law enforcement agencies. (KPM #6, approved for deletion after the 2008-09 APPR) 5.) OSAC cannot directly obtain data on student race-ethnicity, program completions, or enrollment. To collect data for KPMs related to these issues, OSAC must initiate data-sharing agreements with various institutional partners and third parties (at a cost per record, in some cases) and find ways to quantify data received from data exchanges. (KPMs #7, #9, #10, #12) 6.) Student populations vary by institution type, by dependency status, by income, and even by degree goals. Measurements of student success must accommodate this variety. (KPMs #7, #8, #9, #10) 7.) Defining OSAC's customers is problematic. OSAC staff work most directly with scholarship donors and with financial aid officials. Direct contact with students who apply for the Opportunity Grant or for OSAC-administered scholarships is extremely limited. Staff do not normally interact directly with most of the students served by OSAC-administered programs. (KPM#15) 8.) Data measuring percentages of students of color served by OSAC programs are available for the 7,000+ scholarship applicants but are not directly available for OOG recipients -- by far the largest population served at more than 38,800 students in 2008-09. OSAC conducts data matches to collect race-ethnicity data from schools. Further complicating this KPM is a federally mandated change in the way schools must collect and report students' race-ethnicity over the next two years. It will not be possible to make direct comparisons with prior-year data after 2008-09. (KPM #12)

## 5. RESOURCES AND EFFICIENCY

2007-09 Budget Summary: General Fund - \$98,732,175 Lottery Funds - \$9,879,176 Other Funds - \$5,658,268 Other Funds Non-Ltd - \$9,855,788 Federal Funds - \$2,104,655 Efficiencies: KPM #3 (Private/Public Scholarship \$\$ per \$1 Administrative) is only clear efficiency measure. OSAC has reported on this measure since 2006, but it will be an ongoing challenge for OSAC to continue to absorb greater volume without increasing the share of administrative expense.

|                       |  |      |
|-----------------------|--|------|
| <b>KPM #1</b>         | Percentage of growth in number of privately funded scholarships awarded. | 1999 |
| <b>Goal</b>           | Goal 1: Increase college attendance and completion in Oregon             |      |
| <b>Oregon Context</b> | Oregon Benchmarks #24, #25, #26  |      |
| <b>Data Source</b>    | OSAC database  |      |
| <b>Owner</b>          | Scholarship and Access Programs, Vicki Merkel, Director, (541) 687-7385  |      |



## 1. OUR STRATEGY

The agency's goal is to increase the number of scholarship awards to students. Private donors, not public sources, fund these scholarships. Data for this measure are based on counts of the number of scholarship awards made each year. The annual number of awards that can be made by each scholarship program varies due to market influences and donor intent.

## 2. ABOUT THE TARGETS

Actual percentage increases are shown. Targets are deliberately ambitious, reflecting ever-increasing college costs and corresponding increases in student need.

### 3. HOW WE ARE DOING

OSAC's Scholarship Program is unique in the nation. These private scholarship dollars impact both access, by helping to lower education costs, and student borrowing, by lessening students' dependence on loans. Nationally nearly two of every three undergraduate students are going into debt to go to college, borrowing an average of more than \$19,000. In Oregon three of every four students (76.5 percent) take out student loans with an average of \$17,772 total loans, and \$16,641 federal loans (Source: Department of Education's National Center for Education Statistics). A September 2008 report from the Project on Student Loan Debt shows average debt at \$19,800 for students graduating from 4-year institutions in Oregon. More Oregon students are taking out loans than the national average, but the loan debt remains a bit lower. Private scholarships can be a tool to reduce student indebtedness. Despite its relatively small dollar value compared to other sources of financial assistance, private scholarship aid is a critical part of the overall national goal of improving access to higher education. Private scholarship aid stands apart from government and institutional aid in three ways: - It helps students who slip through the cracks of other aid programs. - It facilitates choice and affordability for students of varying income levels. - It provides a testing ground for new approaches to student financing. (Source: Institute for Higher Education Policy: Private Scholarships Count: Access to Higher Education and the Critical Role of the Private Sector Report)

### 4. HOW WE COMPARE

Oregon is unique in the country as the only state government with an agency that partners with private donors, foundations, employers, and banks to administer scholarships to college students. These activities are financed completely by other funds, based on administration fees charged to donors calculated on the award amounts. The unified electronic scholarship application is also unique to Oregon. Students may apply for up to 20 separate scholarship programs using one unified application form, which helps increase the applicant pool for donors and provide access to students. In 2008-09 nearly 10,000 students completed an application. 99.95% filed an electronic application.

### 5. FACTORS AFFECTING RESULTS

The agency's growing portfolio of privately funded scholarship programs demonstrates that private citizens, organizations, and employers are interested in helping students go to college and that they have confidence in OSAC's ability to administer their programs. The agency has been able to add new scholarships to its portfolio and increase the total dollar volume of scholarships awarded every year for the past 6 years. Market trends do affect the returns on endowed funds and, therefore, the amount of interest available to use as scholarship awards or to create new scholarships. The full impact of the current financial crisis is expected to impact the 2010-11 awarding season.

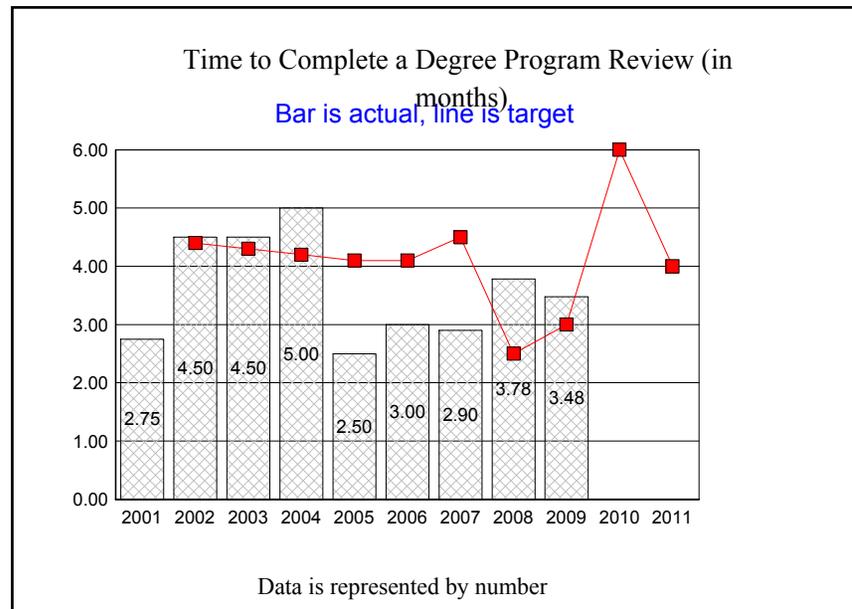
### 6. WHAT NEEDS TO BE DONE

OSAC needs to develop marketing tools, including a handbook for potential donors. The 2007 Legislative Assembly approved a Donor Relations position that has helped the agency expand its outreach activities. The position, combined with agency strategies, will enhance the ability to increase scholarships from new sources.

### 7. ABOUT THE DATA

Data reported are based on scholarships awarded for a specific academic year. The 2% reported for 2007-08 was later recalculated to include additional awards for the year and the corrected growth is 4.36%. Because Key Performance Measures cannot be corrected the difference was applied to the 2008-09 total awards. This measure has been approved by the legislature for deletion beginning 2009-10 academic year.

|                       |   |      |
|-----------------------|---|------|
| <b>KPM #2</b>         | Time to complete a degree program review.   | 1999 |
| <b>Goal</b>           | Goal 2: Protect the value of a college degree                                       |      |
| <b>Oregon Context</b> | Oregon Benchmarks #24, #25, #26   |      |
| <b>Data Source</b>    | ODA tracking spreadsheet (contains all needed data)                                 |      |
| <b>Owner</b>          | Office of Degree Authorization (ODA), Alan Contreras, Administrator, (541) 687-7452 |      |



## 1. OUR STRATEGY

Review new programs first, develop ways to avoid duplicate reviews.

## 2. ABOUT THE TARGETS

Targets are based on known arrival dates of renewals, projected arrivals of new programs and available staff resources. Achieving results below the target is good.

### 3. HOW WE ARE DOING

ODA had reduced the time for completion of program reviews in recent years; however, increased workload in 2008-09 has increased the average time to completion of reviews by half a month. The number of programs reviewed was twice as many as last year and nearly triple what had been expected. Three existing schools with a great number of programs had new and renewal applications in for review. Eight of the other applications were especially problematic, involving a great deal of ODA involvement. These included applications from five schools new to Oregon or to degree-level programs in Oregon. Several schools required extra time to bring their applications to required standards. One of the schools simply allowed its application to lapse after ODA's initial response. So that schools trying to develop new programs were not unduly delayed, the new programs were inserted into the schedule ahead of renewal programs, even if the renewal applications had already been received. This increased the average time for completion, but had no ill effect on the operation of existing programs.

### 4. HOW WE COMPARE

ODA asked other states that conduct a complete review of programs how long it takes them to conduct reviews. Reviews varied somewhat, but most look at the same kinds of issues. Responses follow: Arkansas - 3 to 6 months, sometimes longer California - 3 years (some preliminary actions sooner) Florida - 3 months Georgia - 3 to 4 months Kentucky - 1 to 2 months Minnesota - 6 months Missouri - 6 months New Jersey - 6 to 12 months Ohio - 4 to 5 months South Carolina - 4 to 6 months Texas - 6 to 9 months.

### 5. FACTORS AFFECTING RESULTS

The primary variable is that when a school wants to start a completely new program, we give that application priority in order to allow the school to respond quickly to societal needs. The arrival of such a program means that renewals are held up for a while. However, this has no significant negative effect on the renewing schools because ODA rules allow existing programs to keep operating while the review is happening.

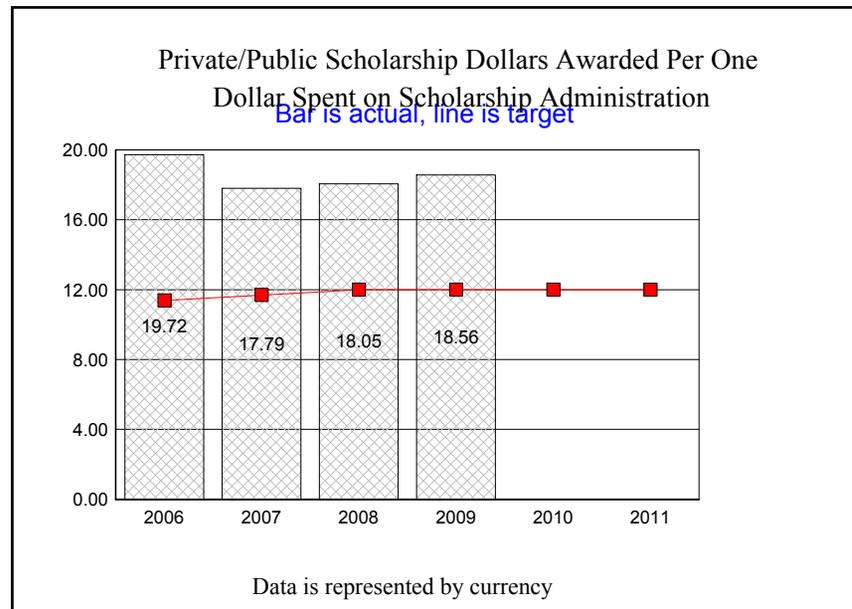
### 6. WHAT NEEDS TO BE DONE

Our opinion is that the current average turnaround time of less than four months per program can be significantly reduced only through the use of contracted reviewers. We have implemented such a system effective June 2009.

### 7. ABOUT THE DATA

ODA applications are tracked by month in a spreadsheet. Both scheduling and projected revenue data can be generated from the spreadsheet. For most reporting, we use the state biennium as our standard framework.

|                       |  |      |
|-----------------------|--|------|
| <b>KPM #3</b>         | Ratio of administrative dollars to private and public Scholarship dollars awarded to students. | 2006 |
| <b>Goal</b>           | Goal 1: Increase college attendance and completion in Oregon                                   |      |
| <b>Oregon Context</b> | Oregon Benchmarks #24, #25, #26  |      |
| <b>Data Source</b>    | OSAC database  |      |
| <b>Owner</b>          | Scholarship and Access Programs, Vicki Merkel, Director, (541) 687-7385                        |      |



### 1. OUR STRATEGY

The agency's goal is to increase efficiency in the processing and awarding of scholarships. OSAC administers financial aid scholarships for a variety of partners, including The Oregon Community Foundation, The Ford Family Foundation, Oregon Department of Human Services, Oregon Department of Education, Office of Rural Health and the Oregon National Guard. This KPM compares administrative costs (personal services plus services & supplies) for scholarship services staff from other funds to total scholarship dollars disbursed to students.

**2. ABOUT THE TARGETS**

The higher the actual dollar amount, the better the agency is doing in providing more funds to students at a lower administrative cost. The first targets for this measure were set in 2006. It may be necessary in the future, once OSAC has collected enough data to determine possible trends, to adjust annual targets.

**3. HOW WE ARE DOING**

This is the fourth year OSAC has reported this data for a Key Performance Measure.

**4. HOW WE COMPARE**

Scholarship programs involve a good deal of administrative work. Publicizing the existence of the programs, collecting applications, coordinating the work of review committees, disbursing funds and tracking recipients are among the tasks that are involved. Traditionally, community foundations have estimated that administrative costs run from five to twenty percent of the programs (Source: Council on Foundations). OSAC's 2008-09 administrative charge for most programs is figured at 10% of the amount of the scholarship awarded. (The 10% is not deducted from the scholarship award.)

**5. FACTORS AFFECTING RESULTS**

The private awards program has grown over the past twenty years and utilizes a variety of technology solutions to administer the individual programs, including processing of applications, selection of awardees, and disbursement of funds to schools. Current processes have improved greatly over the past two years as a result of upgraded software designed by the agency's Information Technology staff. 99.5% of scholarship applications are now completed on-line and reviewed as electronic documents. Selection committees are also able to receive electronic applications via a secure web portal. These enhancements reduce staff time that was needed to process paper applications.

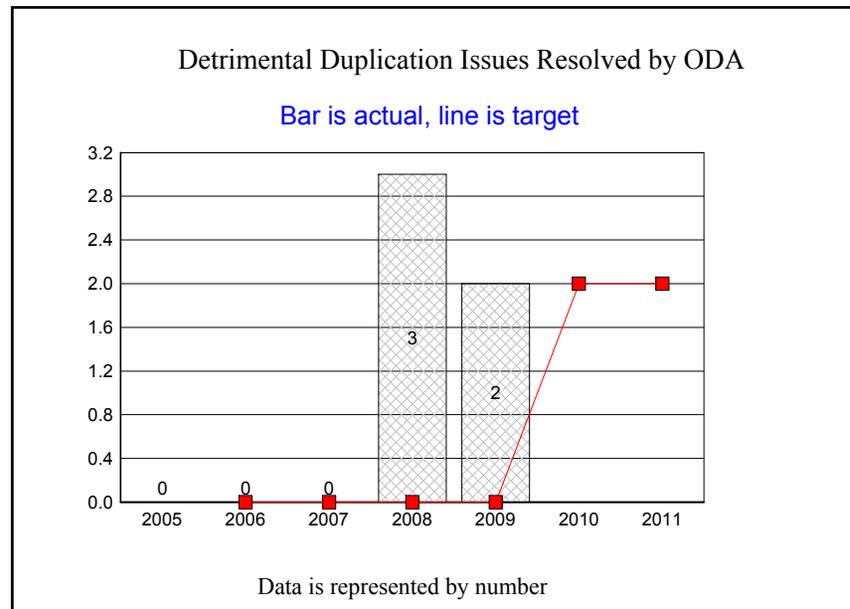
**6. WHAT NEEDS TO BE DONE**

Increasing electronic solutions continues to be a priority. The program is in the process of enhancing the e-student profile web access where individual students can accept award letters and change contact information etc. Increasing the number of selection committees that review electronic applications is a priority.

**7. ABOUT THE DATA**

Data reported are based on scholarships awarded for a specific academic year. The 2008-09 academic year = 2009 KPM report period.

|                       |   |      |
|-----------------------|---|------|
| <b>KPM #4</b>         | Number of detrimental duplication issues resolved by ODA.                           | 2007 |
| <b>Goal</b>           | Goal #2: Protect the value of a college degree                                      |      |
| <b>Oregon Context</b> | Oregon Benchmarks #24, #25, #26   |      |
| <b>Data Source</b>    | Each case has a separate file that can be reviewed.                                 |      |
| <b>Owner</b>          | Office of Degree Authorization (ODA), Alan Contreras, Administrator, (541) 687-7452 |      |



## 1. OUR STRATEGY

Adverse impact issues were a very large part of ODAs work in the 1990s. Owing to automated new program announcements and a generally positive cooperative attitude by all sectors, adverse impact cases all but disappeared until several cases arose in 2007-08. ODA remains the designated agency to resolve such cases, but that is essentially a reserve power at this point.

## 2. ABOUT THE TARGETS

The targets represent an expectation of extremely low activity and are not goals in the usual sense.

### **3. HOW WE ARE DOING**

We expect a continued steady state in adverse impact cases unless the public sector begins a significant process of new program additions.

### **4. HOW WE COMPARE**

Oregon is the only state of which we are aware that allows private colleges a de facto screening power for new public-college degree programs.

### **5. FACTORS AFFECTING RESULTS**

Lack of funds in the public sector and a robust private higher education sector are probably the reason why there have been so few adverse impact issues raised in recent years.

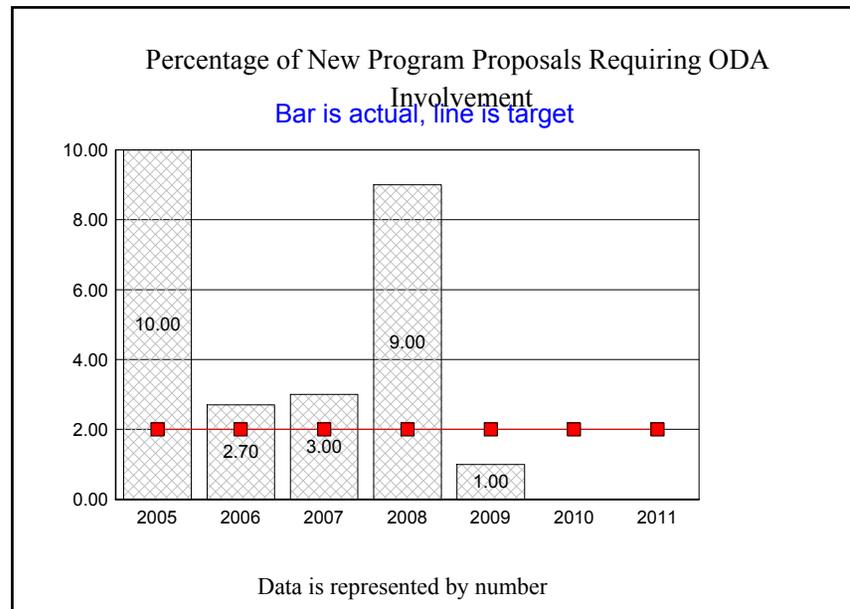
### **6. WHAT NEEDS TO BE DONE**

Although ODA experienced three adverse impact issues in 2007-08, the current low case level continues to be good. ODA should continue to encourage communication among sectors.

### **7. ABOUT THE DATA**

There are so few cases that data consists of isolated points over a period of years. ODA receives no funding dedicated to this specific activity. This measure has been approved by the legislature for deletion beginning 2009-10 academic year.

|                       |  |      |
|-----------------------|--|------|
| <b>KPM #5a</b>        | Percentage of new program proposals requiring ODA involvement – New program application denial rate. | 2007 |
| <b>Goal</b>           | Goal 2: Protect the value of a college degree  |      |
| <b>Oregon Context</b> | Oregon Benchmarks #24, #25, #26  |      |
| <b>Data Source</b>    | ODA tracking spreadsheet (contains all needed data)  |      |
| <b>Owner</b>          | Office of Degree Authorization (ODA), Alan Contreras, Administrator, (541) 687-7452                  |      |



## 1. OUR STRATEGY

At the suggestion of OSAC's Legislative Analyst, this KPM was split into 5a and 5b in 2007. Part 5a has a permanent 2% goal that is the "percentage of applications for new programs denied by ODA."

## 2. ABOUT THE TARGETS

The estimated number of programs to review for 2007-09 is 70. Existing programs are reviewed for reapproval every three years, on a rotating cycle. Targets reflect known programs for which institutions will apply for reapproval. Program reviews are counted individually; some institutions offer several programs, others only a few.

### 3. HOW WE ARE DOING

OSAC has had only two formal denials of full-scale schools in eight years. In the worst cases, the applicants fail to respond to the review letter once it is clear that they cannot meet the standards. The denial was an entity that was determined to keep trying even though it was hopeless. The program approval process is not like licensure, where everything is approved or denied. There is almost always an exchange on how to meet various standards. There have also been a couple denials under the "section d" evaluations of non-Oregon schools that want approval for their degree use in Oregon. No schools were denied approval in 2007-08, but one new school let its application lapse, and one rescinded its application for a new program.

### 4. HOW WE COMPARE

See the "Time to Completion" goal for more detail about how the unit's operations compare to those in other states that do comparable work.

### 5. FACTORS AFFECTING RESULTS

The application of standards necessarily requires that entities either meet the standards (for approval) or be disapproved. Most applicants are willing to work with ODA to meet the standards, but a few do not really have the desire to do so.

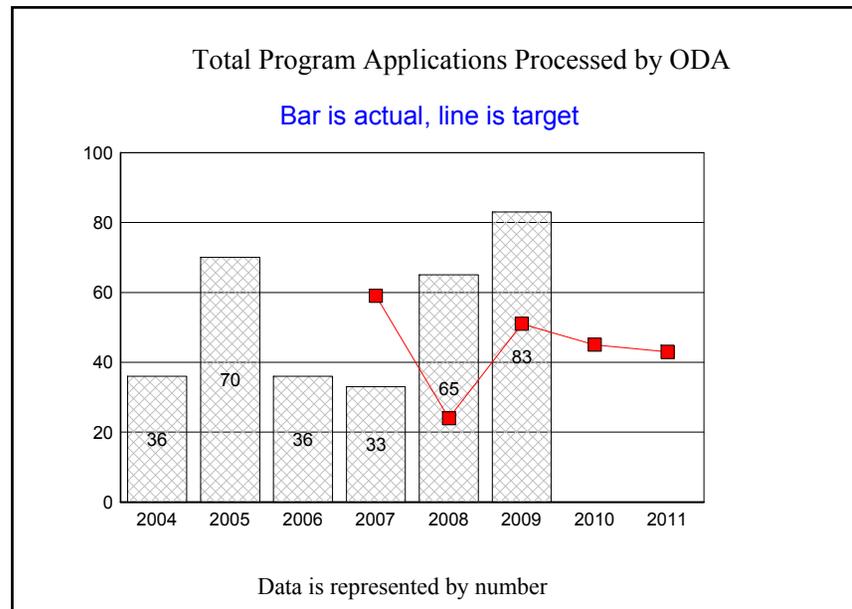
### 6. WHAT NEEDS TO BE DONE

ODA's approval process works quite well as long as it is possible to project arrival dates well enough to avoid backlogs. As long as applicants are primarily responsible schools, ODA anticipates no likelihood of long-term problems or issues.

### 7. ABOUT THE DATA

Most data used in program applications is on a three-year cycle, dependent on the original application date.

|                       |   |      |
|-----------------------|---|------|
| <b>KPM #5b</b>        | Total program applications processed by ODA.  | 2007 |
| <b>Goal</b>           | Goal 2: Protect the value of a college degree                                       |      |
| <b>Oregon Context</b> | Oregon Benchmarks #24, #25, #26   |      |
| <b>Data Source</b>    | ODA tracking spreadsheet (contains all needed data)                                 |      |
| <b>Owner</b>          | Office of Degree Authorization (ODA), Alan Contreras, Administrator, (541) 687-7452 |      |



## 1. OUR STRATEGY

At the suggestion of OSAC's Legislative Analyst, this KPM was split into 5a and 5b in 2007. Part 5b is the number of total program applications received in a year. Goal numbers were first established in 2007 but data from previous years is included in the measure's graph.

## 2. ABOUT THE TARGETS

ODA estimates it will review 70 programs during the 2007-09 biennium. Existing programs are reviewed for reapproval every 3 years, on a rotating cycle. Targets reflect known programs for which institutions will apply for reapproval. Program reviews are counted individually; some institutions offer several programs, other only a few.

### 3. HOW WE ARE DOING

ODA does not control the number of new applications. ODA works with applicants to process applications in a reasonable amount of time. Although total applications were slightly higher in 2009, the total remains within the agency goal.

### 4. HOW WE COMPARE

See the "Time to Completion" goal for more detail about how the unit's operations compare to those in other states that do comparable work.

### 5. FACTORS AFFECTING RESULTS

The application of standards necessarily requires that entities either meet the standards (for approval) or be disapproved. Most applicants are willing to work with ODA to meet standards, but a few do not really have the desire to do so.

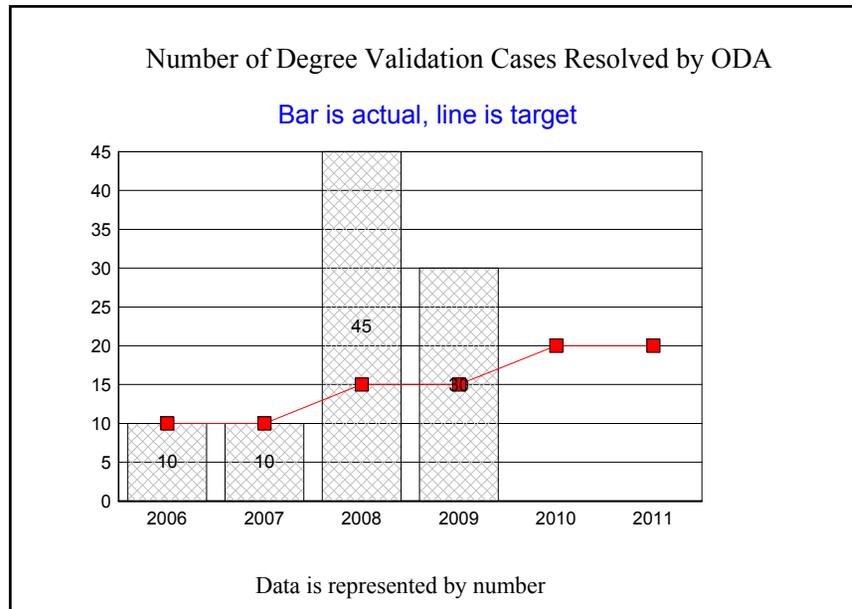
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Most data used in program applications is on a three-year cycle, dependent on the original application date.

|                       |   |      |
|-----------------------|---|------|
| <b>KPM #6</b>         | Number of degree validation cases resolved by ODA.                                  | 2007 |
| <b>Goal</b>           | Goal 2: Protect the value of a college degree                                       |      |
| <b>Oregon Context</b> | Oregon Benchmarks #24, #25, #26   |      |
| <b>Data Source</b>    | ODA office keeps all records of staff actions, presentations and active cases.      |      |
| <b>Owner</b>          | Office of Degree Authorization (ODA), Alan Contreras, Administrator, (541) 687-7452 |      |



**1. OUR STRATEGY**

ODA expects to handle about ten to fifteen significant cases each year. Most of these cases are generated by other state boards and commissions and referred to us, or come about because of members of the public reporting cases to us. For that reason, targets are based on prior experience. ODAs primary strategy is to increase public awareness of the problem of bogus and substandard degrees so that such degrees become less popular, less marketable and less prevalent.

**2. ABOUT THE TARGETS**

In the case of use of bogus degrees, ODA case counts are neither good nor bad because they could reflect more reports by the public (good) or more use of fake degrees (bad). This is true of most agencies that enforce laws.

### 3. HOW WE ARE DOING

Case counts are fairly steady, reflecting a relatively low public education effort by the agency. Occasional bubbles tend to be related to media coverage of a fake degree case, which often flushes out a couple of additional cases. ODAs website continues to be the national leader, averaging about one hit per minute and serving as the principal source for basic information on degree mills for state and local agencies as well as federal units. The increase in 2007-08 results from the federal release of names of users in a criminal case.

### 4. HOW WE COMPARE

When the legislature established the degree mill law in 1997, only New Jersey had a similar law and Oregon was considered a better model. Today, eight other states (Washington, Nevada, Texas, North Dakota, Illinois, Indiana, Maine and Michigan) have similar laws, many based on Oregon. Ohio, Pennsylvania and South Carolina are considering such laws. Oregon has been the leading edge state for some years now.

### 5. FACTORS AFFECTING RESULTS

ODA has very limited funding for public education efforts about degree use and quality issues. Outreach is therefore essentially limited to ODAs website and the willingness of the news media to cover degree use cases.

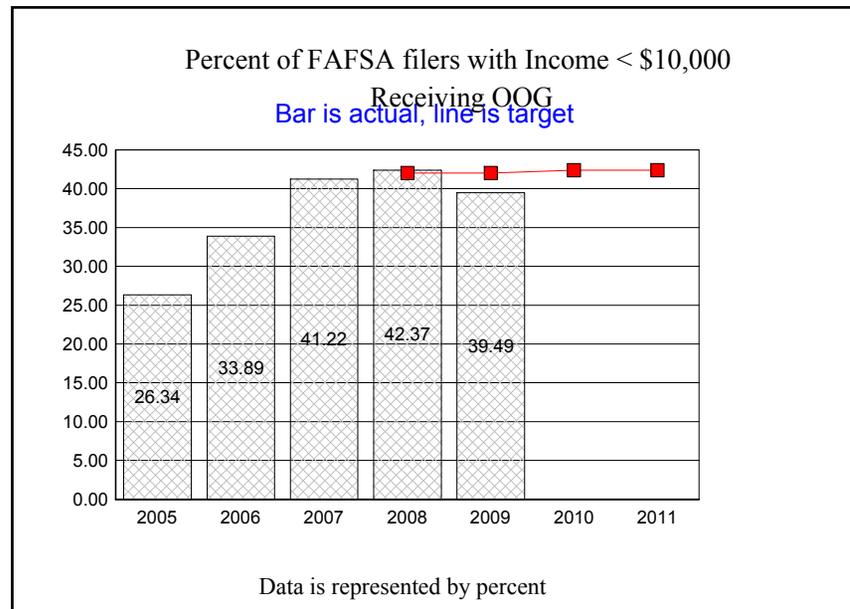
### 6. WHAT NEEDS TO BE DONE

ODA developed an "Employer's Guide to College Degrees" in 2006 with revisions in 2009 that will provide basic information in a PDF format at little cost to the state. Otherwise, ODA is limited by the availability of funding.

### 7. ABOUT THE DATA

ODA tracks data in some years in order to determine what kinds of inquiries and cases are received and from what sources. 2006 data based on six months of tracking shows about 11 degree validation inquiries received each month, with 57 percent related to domestic degrees and 43 percent to foreign degrees. Of these, 58 percent come from private individuals or businesses, 28 percent from colleges (public and private) and 24 percent from public agencies (mostly state agencies) other than colleges. This measure has been approved by the legislature for deletion beginning 2009-10 academic year.

|                       |  |      |
|-----------------------|--|------|
| <b>KPM #7</b>         | Impact of Opportunity Grants on enrollment of eligible students.             | 2008 |
| <b>Goal</b>           | Goal 1: Increase college attendance and completion in Oregon                 |      |
| <b>Oregon Context</b> | Oregon Benchmarks #24, #25, #26  |      |
| <b>Data Source</b>    | OSAC database  |      |
| <b>Owner</b>          | Oregon Opportunity Grant Program, Susan Degen, Administrator, (541) 687-7451 |      |



## 1. OUR STRATEGY

The strategy compares the number of Opportunity Grant (OOG) recipients to the total number of students who file the Free Application for Federal Student Aid (FAFSA) for seven income ranges from \$0 to approximately the median family income for Oregon (\$61,250 for a family of four in 2007, U.S. Census Bureau). The FAFSA serves as the application form for the Federal Pell Grant and for federal student loans, as well as for the Opportunity Grant. Tracking grant assistance by income measures the program's impact on enrollment of eligible students.

## 2. ABOUT THE TARGETS

Developing a target for this measure has been challenging, in part, because of the lack of control the Commission has over key elements, such as college costs, college enrollment rates, and the number of qualified applicants. Although college costs continue to increase at rates higher than annual increases in cost of living, the total number of FAFSA filers has declined somewhat since the economic downturn of 2003. Recently, the trend appears to have leveled off. Targets for 2008 are based upon estimates of the number of students that OSAC can serve with current funding levels and the total number of FAFSAs that will be submitted. For 2009, OSAC proposed to use targets set by the Shared Responsibility Model Steering Committee.

## 3. HOW WE ARE DOING

Data suggests that funding increases by the 2005 Legislative Assembly resulted in increases in total grant recipients at all income levels, most significantly in the lowest three income ranges. These increases reflect recent program changes that expanded award eligibility to students enrolled at least half time in 2007. Program expansion to half-time students offset small declines in the lowest income ranges, possibly indicating students in these ranges would prefer to enroll for lower credit loads. Many of these students may have work or family obligations. Percent of FAFSA filers that receive OOG (by income): \$0-\$9,999: 2005 - 26.34%; 2006 - 33.89%; 2007 - 41.22%; 2008 - 42.37%; 2009- 39.49% \$10,000-\$19,999: 2005 - 21.75%; 2006 - 27.47%; 2007 - 33.06%; 2008 - 32.19%; 2009 - 22.96% \$20,000-\$29,999: 2005 - 17.73%; 2006 - 22.46%; 2007 - 26.63%; 2008 - 26.31%; 2009 - 15.63% \$30,000-\$39,000: 2005 - 10.37%; 2006 - 11.75%; 2007 - 13.82%; 2008 - 13.77%; 2009 - 11.04% \$40,000-\$49,000: 2005 - 1.46%; 2006 - 2.62%; 2007 - 3.65%; 2008 - 4.01%; 2009 - 6.09% \$50,000-\$59,999: 2005 - 0.00%; 2006 - 0.00%; 2007 - 0.20%; 2008 - 0.38%; 2009 - 3.15% \$60,000-\$69,000: 2005 - 0.00%; 2006 - 0.02%; 2007 - 0.07%; 2008 - 0.27%; 2009 - 1.28% \$70,000 or greater: 2005 - 0.01%; 2006 - 0.02%; 2007 - 0.06%; 2008 - 0.06%; 2009 - 0.31%

## 4. HOW WE COMPARE

This KPM is still being developed. In a recent survey of other state agencies that administer state-funded need-based grant programs, OSAC found itself to be much further along in the development of key performance measures to track agency progress.

## 5. FACTORS AFFECTING RESULTS

Developing a strategy for this KPM is challenging, in part, because of the complexity of students' choices. It is very difficult to show a single grant's direct effect on enrollment because of the many variables that affect a student's decision to go to college--changing price differentials among schools over time, upturns/downturns in Oregon's economy, family crises (e.g., death of a parent, catastrophic medical costs, loss of job by primary wage-earner), changes in institutional and federal aid of various types, ease or difficulty of credit transfer, and so on. Persistence rates (KPM #8) and completion rates (KPMs #9 and #10) suggest the potential for academic success of Opportunity Grant recipients compared to their peers. Through the completion of the 2007-08 academic year, grants were available only to students from families with incomes below 55% of the median family income for a family of four in Oregon. This changes with implementation of the Shared Responsibility Model in 2008-09 and will be first reported on in the 2009 APPR.

## 6. WHAT NEEDS TO BE DONE

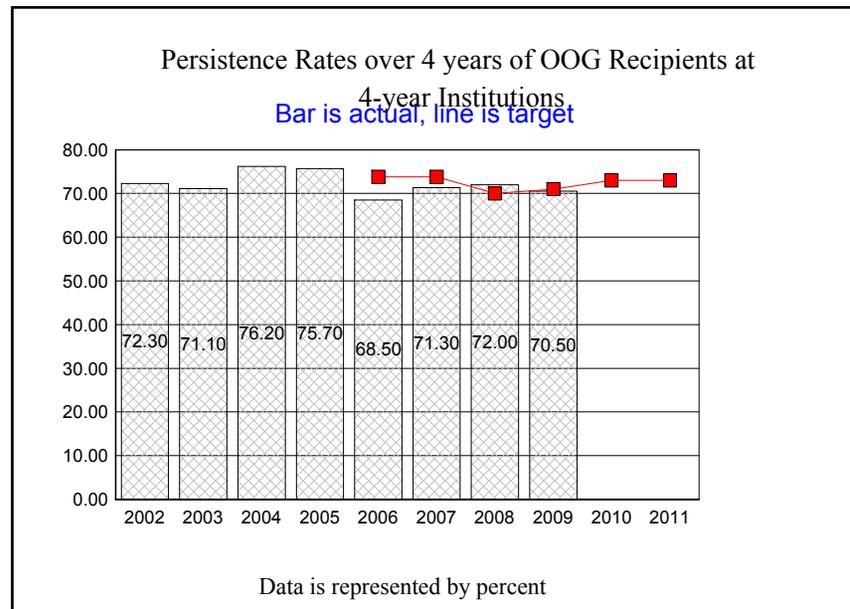
The 2008 data tracks the second year of a significant program expansion, so it is too early to be able to determine the true effects of increased program funding and

program expansion to all eligible full-time and part-time students.

**7. ABOUT THE DATA**

The reporting cycle for this data is the Oregon fiscal year, which is the same as the academic year (July to June). This measure has been approved by the legislature for deletion beginning 2009-10 academic year.

|                       |   |      |
|-----------------------|---|------|
| <b>KPM #8</b>         | Persistence rates over 4 years for students at 4-year institutions who are eligible and awarded an OOG. | 2007 |
| <b>Goal</b>           | Goal 1: Increase college attendance and completion in Oregon  |      |
| <b>Oregon Context</b> | Oregon Benchmarks #24, #25, #26   |      |
| <b>Data Source</b>    | OSAC database of annual FAFSA records received from the U.S. Department of Education                    |      |
| <b>Owner</b>          | Oregon Opportunity Grant Program, Susan Degen, Administrator, (541) 687-7451                            |      |



## 1. OUR STRATEGY

This measure tracks student-applicants annual submissions of the Free Federal Application for Financial Aid (FAFSA) to US Dept of Education. The FAFSA is the application for most federal student aid programs and for the Oregon Opportunity Grant. Filing a FAFSA in subsequent years is a good indicator of a students intent to persist toward program completion. After the end of each academic year, identifies the cohort eligible first-year students and tracks this cohort's FAFSA filings in subsequent academic years. OSAC also compares the persistence rates of recipients (first-year students who received grant funds) and eligible nonrecipients (students who would have received an award if sufficient funding had been available for all eligible students. In years when funding is limited, OSAC uses application

deadlines a cost-control primary mechanism. Until 2009, application deadlines were not published early because they were based on application filing rates during annual award processing. Data are compiled after the end of the academic year, usually by early fall. The most recent cohort group looks at 4-year persistence rates for first-year students who started in 2005-06 and filed FAFSAs through 2008-09.

## 2. ABOUT THE TARGETS

Persistence rates for 2009 are for first-year students in 2005-06 who continued to file FAFSAs for four consecutive years, through 2008-09. OSAC first developed this KPM in 2005, but initial rate calculations were not accurate. OSAC refined the query that identifies each cohort group in 2006 and recalculated rates for prior years, resulting in actual rates ranging from 62.7% to 68.6% for grant recipients and from 28.3% to 34.5% for eligible nonrecipients. In years when the grant is not available to all eligible students, OSAC tracks rates for both recipients and eligible nonrecipients (who met eligibility requirements but missed the application deadline date). Expansion of the grant to part-time students in 2006-07 resulted in some increases in persistence rates. However, targets for 2006 and 2007 were set prior to program expansion and were based on the average rates for 2002 through 2005. Revised rates for prior years indicate a target of 70.0% for 2008 is reasonable. The first year under increased program funding was 2008-09. A higher target of 71% was expected, but funding, although significantly increased, was still not sufficient to meet a surge in demand due to changing economic conditions. For 2009-11, appropriations decreased, which may result in a lower actual persistence rates than targeted.

## 3. HOW WE ARE DOING

Because of funding increases in the 2007-09 biennium and Shared Responsibility Model implementation, the implication of these trends may not yet be apparent. What is known, however, is that persistence rates of grant recipients are significantly higher than those of nonrecipients. Moreover, persistence rates of grant recipients are higher than overall retention rates for 4-year postsecondary institutions in Oregon (see below).

## 4. HOW WE COMPARE

Institutions that participate in the Oregon Opportunity Grant Program also participate in federal Title IV student financial aid programs. Federal regulations require Title IV institutions to report data, including retention rates, annually to the U.S. Department of Education's Integrated Postsecondary Education Data System (IPEDS). Retention rates for 4-year institutions are defined as "the percentage of first-time bachelor's degree-seeking undergraduates from the previous fall who are again enrolled in the current fall." The average of the most recent available retention rates for Oregon 4-year institutions is 76.59% after two years. Persistence rates of approximately 70% after four years for Opportunity Grant recipients compare very favorably with the average retention rate of 75% after just two years for students at 4-year institutions.

## 5. FACTORS AFFECTING RESULTS

For the past 5 or 6 years, the grant program has experienced some kind of change in program methodology or award parameters. Thus, trends attributable to program changes made in 2005-07 may not be clear for some time, and year-to-year comparisons are problematic. In 2008-09, the Shared Responsibility Model was implemented, and this will make estimates of future trends or targets uncertain. Delayed results of program changes are due to several factors: data are not available until after the end of an academic year; reported rates are based on student behavior over 4 years; changes in the formula calculation of the Oregon Opportunity Grant using Shared Responsibility Model. In addition, external factors such as tuition increases, availability of other forms of aid (especially Pell Grants) and changes in

Oregon's economy may affect students' decisions about going to college.

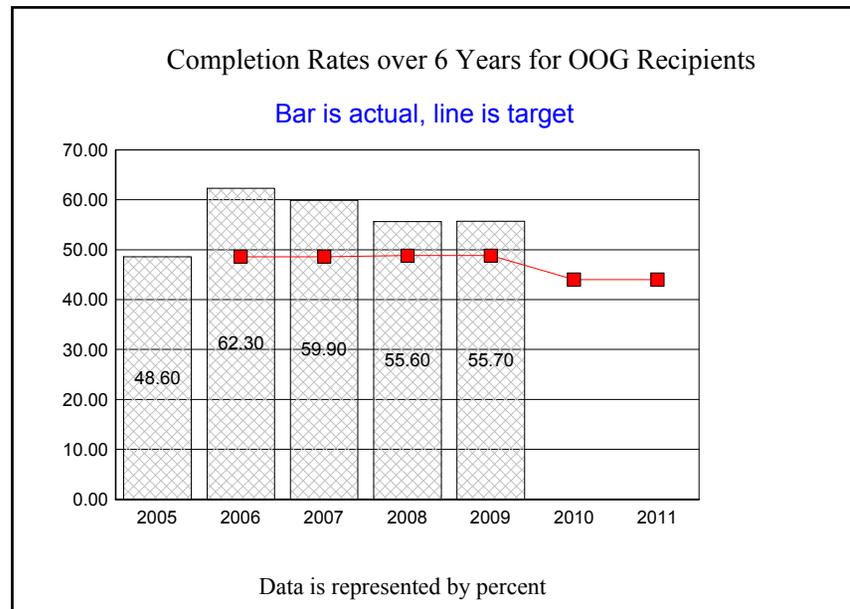
#### **6. WHAT NEEDS TO BE DONE**

OSAC developed this KPM in response to a budget note from the 2003 Legislatively Approved Budget that instructed the Commission, in part, "to develop additional measures to identify the impact of the Opportunity Grant on recipient's ability to complete degree programs." The second year of a significant program expansion just ended, so it is too early to be able to determine the true effects of increased program funding and program expansion to all eligible full-time and part-time students. In contrast with the new 2009-11 biennium, the funding appropriation has been decreased and it will limit the eligible full-time and part-time students.

#### **7. ABOUT THE DATA**

The reporting cycle for this data is the Oregon fiscal year, which is the same as the academic year (July to June).

|                       |  |      |
|-----------------------|--|------|
| <b>KPM #9</b>         | Completion rates (graduated within 6 years) for students at 4-year institutions who are eligible and awarded an OOG. | 2007 |
| <b>Goal</b>           | Goal 1: Increase college attendance and completion in Oregon   |      |
| <b>Oregon Context</b> | Oregon Benchmarks #24, #25, #26  |      |
| <b>Data Source</b>    | OSAC database; National Student Clearinghouse  |      |
| <b>Owner</b>          | Oregon Opportunity Grant Program, Susan Degen, Administrator, (541) 687-7451   |      |



## 1. OUR STRATEGY

For each academic year, OSAC identifies a cohort group of first-year, first-time Opportunity Grant recipients and, if possible, a similar group of eligible nonrecipients (students who met eligibility criteria but missed the application deadline). In years when funding was limited, OSAC has used application deadlines as the primary cost-control mechanism. OSAC uses an in-house database to randomly select a representative sample of approximately 500 student records from recipient and nonrecipient groups for each institutional segment and conduct a completion match with the National Student Clearinghouse at a cost of \$.25 per record. By federal definition, students enrolled full time meet satisfactory academic progress if they complete their undergraduate program of study within 150 percent of the programs

published length (i.e., complete a 4-year program within 6 years). The most recent cohort group for whom data are available is first-year students from 2003-04 who completed their programs by 2008-09. In years when funds are available to serve all eligible students, there is no group of late-filing eligible nonrecipients to compare against the cohort group. Increased funding and implementation of the Shared Responsibility Model for determining OOG award amounts, starting in 2008-09, may also affect completion rates as students from higher-income groups become eligible for OOG funds for the first time. For 2009-11, this trend of funding higher income levels will be reversed with the introduction of tuition tax credits into the calculation. OSAC will modify targets based on changing trends. Data for KPMs are compiled after the end of the academic year, usually in August. Over time, this will provide an indicator of the effectiveness of Opportunity Grants for students enrolled at 4-year institutions.

## 2. ABOUT THE TARGETS

Targets are only for grant recipients; no targets will be set for late-filing eligible nonrecipients. The higher the percentage, the more grant recipients are successfully completing their programs of study within 6 years. The original data on which the targets were based were collected during the 2005 legislative session. Six Oregon postsecondary institutions do not report to the Clearinghouse, including two of the 40 institutions that participate in the Opportunity Grant Program, Oregon Health and Sciences University and Marylhurst University, each of which enrolls only a small number of grant recipients. Since nearly all Oregon postsecondary institutions, and most other institutions throughout the country report to the Clearinghouse, conducting data matches with the Clearinghouse provides OSAC with the most comprehensive information available to date on student completions.

## 3. HOW WE ARE DOING

Although this is a relatively new KPM, OSAC's strategy for compiling completion data has improved vastly, and OSAC anticipates no difficulties in continuing to retrieve reliable data. The OOG program has seen changes each year for the past 4 years. Limited funding that required rationing by application deadline dates was 2004-05 and had to be reintroduced in the 2008-09 academic year. For 2005-06, funding was sufficient to serve all eligible full-time students attending public institutions and approximately 90% of eligible full-time students at private independent 4-year institutions. For 2006-07, funding was again available for all full-time students at all public institutions and, for the first time, for eligible students enrolled at least half time (6 to 11 credit-hours per term). For 2007-08, the program continued to serve all eligible full and half-time students. Because the program has experienced so many changes, and will see more changes in the 2009-10 academic year, OSAC may not be able to determine trends for several more years.

## 4. HOW WE COMPARE

Institutions that participate in the Oregon Opportunity Grant Program also participate in federal Title IV student financial aid programs. Federal regulations require Title IV institutions to report data, including retention rates, annually to the U.S. Department of Education's Integrated Postsecondary Education Data System (IPEDS). IPEDS publishes graduation rates for all participating institutions on its College Navigator website. For 4-year institutions, IPEDS defines a graduation rate as the percentage of students in a given entering cohort (group) who graduated within a specified period of time -- 6 years for students enrolled full-time at 4-year institutions. The average of the most recent available completion rates for Oregon 4-year institutions is 56.75% for the 2002-03 cohort (graduated by 2007-08). Limiting information on completion rates to 4-year public Oregon institutions omits those students who complete their programs after transferring to schools in another state or to a 4-year private independent institution in Oregon. It is for this reason that OSAC conducts matches with the National Student Clearinghouse rather than with OUS or individual institutions.

### 5. FACTORS AFFECTING RESULTS

OSAC developed this KPM in response to a budget note from a previous legislative cycle that instructed the Commission to develop measures to identify the impact of the Opportunity Grant on recipients' ability to complete degree programs. Taken together with persistence rates, completion rates indicate the potential for academic success of Opportunity Grant recipients compared to their peers. This KPM does not, however, show the direct effect of the Opportunity Grant on completion rates of grant recipients because there too many variables that affect a students decision to persist and complete his/her programs, upturns/downturns in Oregons economy, changing price differentials among schools over time, family crises (e.g., death of a parent, catastrophic medical costs, loss of job by primary wage-earner), changes in federal and institutional aid of various types, changes in the Oregon Opportunity Grant calculation of the formula with Shared Responsibility Model and tuition tax credits, ease or difficulty of credit transfer, and so on. The OOG is just one element of many in providing access to higher education.

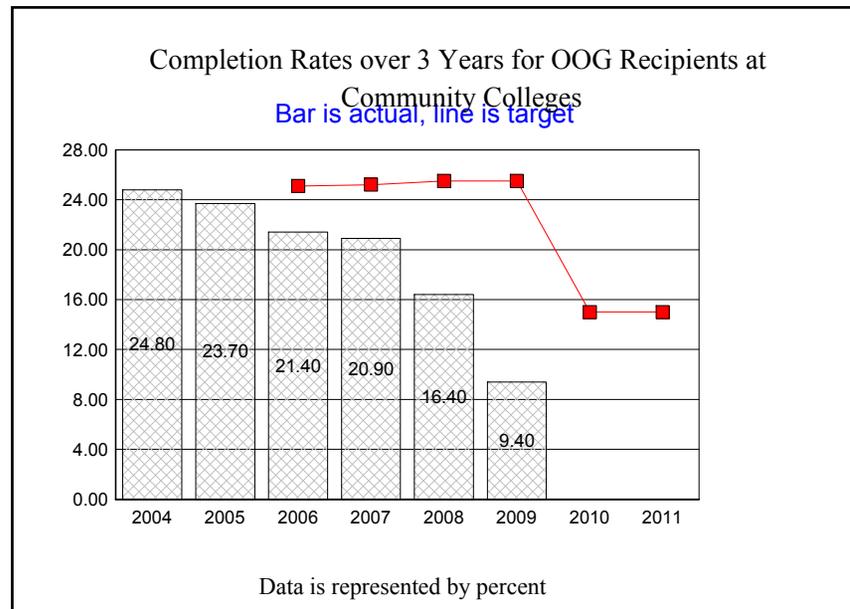
### 6. WHAT NEEDS TO BE DONE

Until 2008-09, the Opportunity Grant made up approximately 11% of a student's average cost of attendance for the previous academic year, and the award was available only to low-income students (i.e., students with annual family incomes of less than \$35,000). Some research has suggested that award amounts of approximately 15% to 20% of a student's cost may have a more positive effect on an individual student's ability to complete his/her program of student, particularly for this low-income student population. In theory, increasing award amounts would help more grant recipients complete their programs on time. Increased program funding for 2007-09 biennium and the implementation of a completely new process for determining award amounts for all students in 2008-09 will have major, unknown impacts on this KPM. Maximum award amounts for 2008-09 increased to \$3200 for students attending 4-year public institutions and to \$2600 for students attending community colleges, but awards for many students at private nonprofit 4-year institutions dropped below 2007-08 levels. Increased funding and a new formula for calculating awards in 2008-09 also extended grant eligibility to some middle-income students for the first time. OSAC has no data on this cohort group yet, but research suggests that higher-income students tend to have higher completion rates. OSAC anticipates increases in actual data and possible increases in targets in subsequent years. The effect of the downturn in Oregon's economy negatively affected OOG funding in 2008-09. OSAC had to suspend making new OOG awards at the end of November 2008 and reduce spring-term disbursements. As a result, funds were not available to serve all students who had planned to complete their programs in 2008-09.

### 7. ABOUT THE DATA

The reporting cycle for this data is the Oregon fiscal year, which is the same as the academic year (July to June).

|                       |   |      |
|-----------------------|---|------|
| <b>KPM #10</b>        | Completion rates (graduated within 3 years) for students at community colleges who are eligible and awarded an OOG. | 2007 |
| <b>Goal</b>           | Goal 1: Increase college attendance and completion in Oregon  |      |
| <b>Oregon Context</b> | Oregon Benchmarks #24, #25, #26   |      |
| <b>Data Source</b>    | National Student Clearinghouse  |      |
| <b>Owner</b>          | Oregon Opportunity Grant Program, Susan Degen, Administrator, (541) 687-7451  |      |



## 1. OUR STRATEGY

The data collection strategy for this KPM is similar to KPM #9, which measures completion rates for students at four-year institutions. For each academic year, OSAC identifies a cohort group of first-year, first-time Opportunity Grant recipients. In years when it is not possible to make awards to all eligible students, OSAC also selects a cohort of eligible nonrecipients, i.e., otherwise eligible students who applied after the application deadline. In years when funding is limited, OSAC uses application deadline dates as one of several cost-control mechanisms. OSAC randomly selects a representative sample of approximately 500 student records of recipient and nonrecipient groups and conducts data-matches with the National Student Clearinghouse at a cost of \$.25 per record.

## 2. ABOUT THE TARGETS

Targets are only for grant recipients. The higher the percentage, the more grant recipients are successfully completing their programs of study on time (i.e., within 3 years). The original data on which the targets were based were collected during the 2005 legislative session, but using a process that compared data against the centralized database of the Office of Community Colleges and Workforce Development, resulting in incomplete data. Since 2006, OSAC has compared data from its internal database with Clearinghouse data. Since nearly all Oregon postsecondary institutions, and most other institutions throughout the country report to the Clearinghouse, conducting data matches with the Clearinghouse provides OSAC with the most comprehensive information available to date on student completions.

## 3. HOW WE ARE DOING

This is a relatively new performance measure. We do not yet have enough data to identify trends.

## 4. HOW WE COMPARE

OSAC is one of only a few state agencies across the country that compile and report on performance measures for state-funded need-based student financial aid programs. It may be possible to compare completion rates for Opportunity Grant recipients with completion rates of Oregon community colleges as reported annually to the federal Integrated Postsecondary Educational Data System (IPEDS) and posted on the College Navigator website.

## 5. FACTORS AFFECTING RESULTS

OOG recipients at the community college level include students in one-year certificate programs, most of whom do not go on to complete 2-year Associate degrees; students in 2-year Associate Degree programs; and students who transfer to 4-year programs, sometimes earning a formal transfer degree, sometimes not. Some students who transfer to 4-year programs do not complete 2 years at a community college. Only after the student earns a certificate or degree does information about the student's chosen program of study become available. Community college students are more likely to be older, independent, working adults; they are also more likely to enroll part time, to attend less than a full academic year, and to need additional time to complete their programs. Thus, a reasonably accurate picture of academic success for OOG recipients enrolled in community colleges should allow up to six years for a student. Taken together with persistence rates, completion rates indicate the potential for academic success of Opportunity Grant recipients compared to their peers. This KPM does not however, show the direct effect of the Opportunity Grant on completion rates of grant recipients because there are too many variables that affect a student's decision to persist and complete his/her programs--upturns/downturns in Oregon's economy, changing price differentials among schools over time, family crises (e.g., death of a parent, catastrophic medical costs, loss of job by primary wage-earner), changes in federal aid of various types (especially Pell Grants), changes in the Oregon Opportunity Grant calculation of the formula with Shared Responsibility Model and tuition tax credits, ease or difficulty of credit transfer, and so on. The Opportunity Grant is just one element of many in providing access to community colleges.

## 6. WHAT NEEDS TO BE DONE

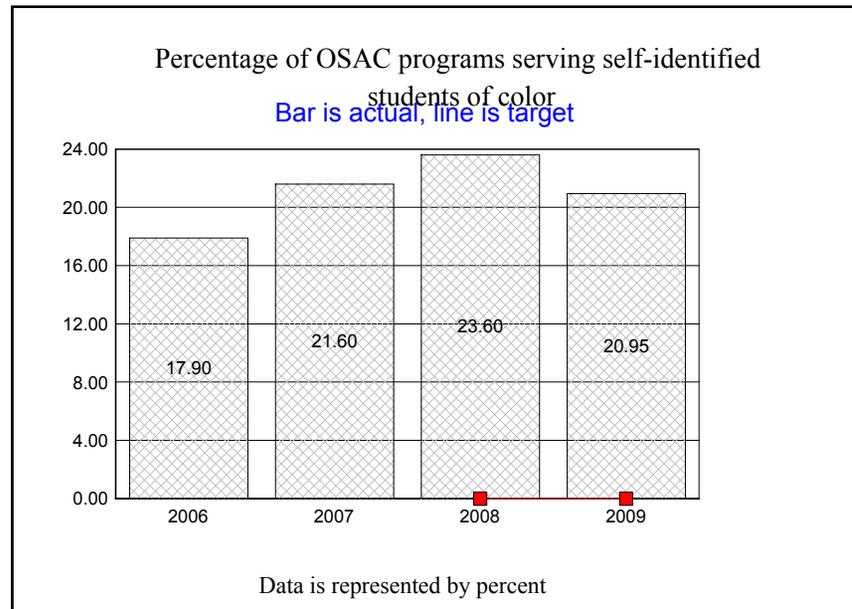
During the first two years for the 2009 cohort group, the Opportunity Grant was equal to approximately 11% of a student's average cost of attendance, but the award was available only to low-income students with family incomes of \$34,000 or less. Some research suggests that awards equal to 15% or 20% of a student's cost may

have a more positive effect on a student's ability to complete his/her program of study, particularly for low-income students. Opportunity Grant awards are only available for the equivalent of 4 years (8 semesters or 12 quarters) of full-time enrollment. An increase in award amounts would help more of grant recipients complete their programs on time. Increased program funding for 2007-09 and implementation of a completely new process for determining award amounts for all students in 2008-09 may have major impacts on this KPM. At the same time, increased funding for 2008-09 extended grant eligibility to some middle-income students OSAC, which may affect completions in 2009, since research has shown that students in higher income groups tend to have higher completion rates. At the same time, the effect of the downturn in Oregon's economy negatively affected OOG funding in 2008-09. OSAC had to suspend making new OOG awards at the end of November 2008 and reduce spring-term disbursements. As a result, funds may not have been available to all students who had planned to complete their programs in 2008-09.

## 7. ABOUT THE DATA

The reporting cycle for this data is the Oregon fiscal year, which is the same as the academic year (July to June). Institutions have up to 60 days after the end of a student's period of enrollment or the end of the academic year to report to the US Department of Education and Clearinghouse.

|                       |  |      |
|-----------------------|--|------|
| <b>KPM #12</b>        | Percentage of students of color served by OSAC programs (i.e., disaggregate measures to track race/ethnicity of beneficiaries of OSAC program services). | 2005 |
| <b>Goal</b>           | Goal 1: Increase college attendance and completion in Oregon   |      |
| <b>Oregon Context</b> | Oregon Benchmarks #24, #25, #26  |      |
| <b>Data Source</b>    | Varies by program: Scholarship Services application; Oregon Opportunity Grant data matches with institutions and segments                                |      |
| <b>Owner</b>          | Varies by program  |      |



## 1. OUR STRATEGY

The Commission collects race/ethnicity (R/E) data about scholarship and grant applicants from internal and external sources and reports R/E totals for OSAC's two main programs -- Scholarship Services and the Oregon Opportunity Grant. The four R/E codes correspond to four traditionally recognized ethnic groups: African American (AfrAm), Native American/Alaskan Native (NatAm), Asian/Pacific Islander (Asia/Pac), and Hispanic (Hisp). The Free Application for Federal Student Aid (FAFSA), which serves as the application for both federal student aid programs and the Oregon Opportunity Grant, does not collect R/E data. However, postsecondary institutions that participate in federal Title IV programs are required to report summary-level data about their students' race/ethnicity to the Integrated Postsecondary

Education Data System (IPEDS). A student's race/ethnicity is a self-reported, optional data element that institutions collect during matriculation and then transfer summaries to IPEDS. For Opportunity Grants, OSAC conducts data-matches to collect R/E data from the Oregon University System (OUS), the Community College and Workforce Development division (CCWD) of the Oregon Department of Education, and individual private independent 4-year institutions, as reporting schedules permit after the end of the academic year in July/August. For Scholarship Services (SchSrv), OSAC collects R/E data from the 7,000+ students who complete the OSAC combined scholarship application for the 400+ scholarship programs it administers. Data for this KPM are compiled after the end of the academic year, usually in August. This measure was developed in response to a Budget Note from OSAC's 2003 Legislatively Approved Budget, which instructed the Commission to "disaggregate measures that track services to students by race and ethnicity, with a special emphasis on agency program services to Latino students."

## 2. ABOUT THE TARGETS

Percentages of recipients in each major R/E group are collected separately for the Opportunity Grant and for Scholarship Services. OSAC has not set targets for this measure in the past, as the agency has deemed it inappropriate to determine targets based upon race and/or ethnicity. At the suggestion of the Interim Ways and Means Committee, OSAC suggested comparing results with overall state census data. The most recent R/E data for Oregon for the percentage of population age 25-64 by race/ethnicity comes from the 2000 Census: 85.3% white, 1.5% African-American, 6.6% Hispanic/Latino, 1.1% Native American/Alaskan Native, and 3.3% Asian/Pacific Islander.

## 3. HOW WE ARE DOING

With limited data for some programs, it is too early to detect particular trends for this KPM.

## 4. HOW WE COMPARE

The most recent R/E data for Oregon for the percentage of population age 25-64 by race/ethnicity comes from the 2000 Census: 85.3% white, 1.5% African-American, 6.6% Hispanic/Latino, 1.1% Native American/Alaskan Native, and 3.3% Asian/Pacific Islander. R/E percentages are reported by individual Oregon postsecondary institutions are available on the U.S. Department of Education's College Navigator website. In most cases, overall percentages are near or above statewide percentages for underserved populations.

## 5. FACTORS AFFECTING RESULTS

The Oregon Student Assistance Commission increased outreach efforts throughout the state starting in 2005-06 by hiring regional scholarship consultants to present workshops on OSAC grants and scholarships at college fairs and college campuses. The ASPIRE program increased from 82 high schools in 2006-07 to nearly 115 high schools and locations by 2008-09, reaching more students with information and individual mentoring. All institutions that report to the federal IPEDS system are required to revise the way they collect and report students' race and ethnicity by 2010-11. It will not be possible to make year-to-year comparisons of R/E data for several years after 2010-11 until new trends can be established. Under the new IPEDS guideline for collecting and reporting race and ethnicity data, institutions must use a 2-question format. The first question asks about ethnicity (is the individual Hispanic or Latino, yes or no) and the second question asks about race (the individual selects one or more race categories with which he or she identifies: American Indian or Alaska Native; Asian; Black or African American; Native Hawaiian or Other Pacific Islander; White). These changes in reporting and collection of R/E data may adversely affect OSAC's ability to continue reporting this KPM.

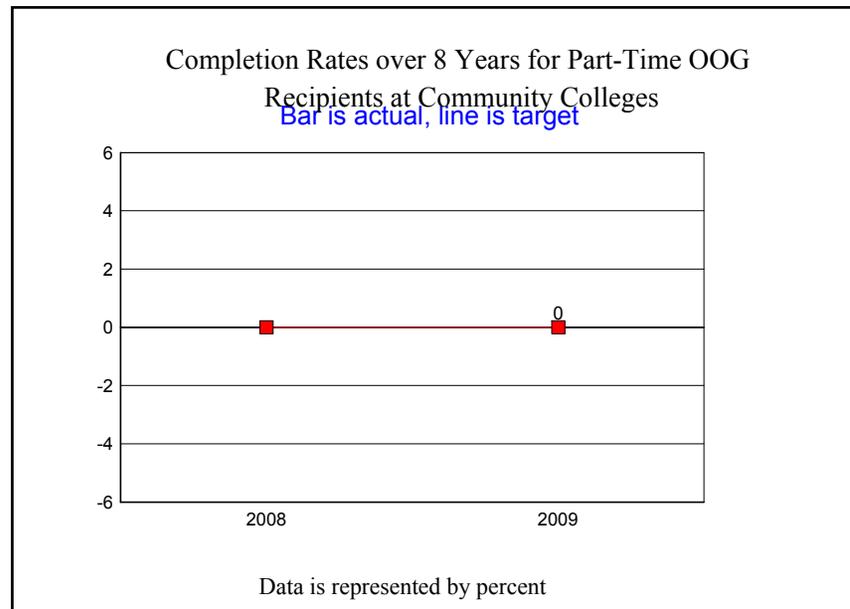
**6. WHAT NEEDS TO BE DONE**

The agency must continue outreach efforts to Oregonians about OSAC-administered grants and scholarship and about financial aid information in general. These efforts should consider social marketing strategies to reach students of color and other underserved groups. OSAC participates in events such as College Goal Oregon (CGO), started in 2007 on 15 campuses statewide help students and their families file the Free Application for Federal Student Aid (also used as the application for the Oregon Opportunity Grant) and the OSAC scholarship application. The event helped more than 2,000 students in 2008 and more than 2,400 students in 2009. Such events include a number of social marketing strategies to reach underserved students, including the following: 1) To utilize social networks to reach students and their families, regional committee identify target audiences within the student's populations in their geographic area. 2) Engage the financial aid administrators at Oregon's colleges to bring CGS materials to high schools throughout the state and identify social networks. 3) Utilize the Oregon Indian Postsecondary Education Coalition and the Oregon Council for Hispanic Advancement to distribute materials to Native American and Latino students throughout the state and as social network participants. 4) Locate additional Hispanic and African American networks in each geographic region as indicated. 5) Engage education groups who work with students such as Confederation of School Administrators and Oregon School Counselor Association.

**7. ABOUT THE DATA**

Data are for the Oregon fiscal year, which is similar to the standard academic year -- July 1 through June 30.

|                       |  |      |
|-----------------------|--|------|
| <b>KPM #13</b>        | Completion rates for part-time students.                                     | 2008 |
| <b>Goal</b>           | Goal 1: Increase college attendance and completion in Oregon                 |      |
| <b>Oregon Context</b> | Oregon Benchmarks #24, #25, #26  |      |
| <b>Data Source</b>    | OSAC database; National Student Clearinghouse                                |      |
| <b>Owner</b>          | Oregon Opportunity Grant Program, Susan Degen, Administrator, (541) 687-7451 |      |



### 1. OUR STRATEGY

At the end of each academic year, OSAC will identify a cohort of first-year, first-time students who received Oregon Opportunity Grant (OOG) funds for half-time enrollment during Fall term. OSAC will select statistically representative samples of part-time grant recipients, by institutional type (community colleges and 4-year public institutions), and conduct data matches with the National Student Clearinghouse to collect completions data for each group. The National Student Clearinghouse conducts data matches and returns completions data for those student records in their system to OSAC at a cost of \$.25 per matched record. OSAC will run a query of its database to randomly select a representative sample of approximately 500 student records of part-time OOG recipients for each institutional type.

The student populations at 2- and 4-year institutions are very different, so OSAC has proposed tracking completion rates separately for students at 2-year and students at 4-year institutions. By federal definition, full-time students make satisfactory academic progress if they complete their undergraduate program of study within 150% of the program's published length (traditionally, 2 years for an Associate's degree and 4 years for a Baccalaureate degree). This is the standard used by the US Department of Education and is also the standard used for the completion rates data reported for KPMs #9 and #10. For part-time recipients, OSAC defines satisfactory progress at 200% of program length and sets completion-rate targets at 75% of the completion-rate targets in KPMs #9 and #10. Data on the first cohorts of part-time students will not be available until after 2009-10 for students in 2-year programs and after 2013-14 for students in 4-year program. Only part-time students who are enrolled at least half-time (6 to 11 credit-hours per academic term) and meet income and other OOG eligibility requirements are eligible to receive awards. OOG funds were available to all eligible students in 2006-07, so there is no cohort of nonrecipient late-filers against which to compare a cohort group. Increased funding and implementation of the Shared Responsibility Model (SRM) for determining OOG award amounts, starting in 2008-09, may also affect completion rates as students from higher-income groups become eligible for OOG funds for the first time in the program's history. Year-to-year comparisons of data will not be possible. The formula for determining grant eligibility and award amounts for "part-time" students changed in 2008-09. For 2006-07 and 2007-08, awards for half-time students equaled 50% of full-time awards. For 2008-09, however, OSAC will use a different formula to calculate half-time award amounts, causing awards for many part-time students to drop from 50% of a full-time award to \$0. The effect of this change in the way half-time awards are calculated will only be known after the end of the 2008-09 academic year. For 2009-10, part-time awards will again be 50% of full-time awards. Data for KPMs are compiled after the end of the academic year, usually in September.

## 2. ABOUT THE TARGETS

No actual data will be available until late 2010 at the earliest. OOG recipients enrolled half time in Fall 2006 will be the first cohort group of "part-time" students for whom OSAC will be able to report completion rates. For students at community colleges, actual completions data will not be available until 2009-10 -- 4 years after the end of the 2006-07 academic year. For students at 4-year institutions, actual completions data will not be available until 2013-2014 -- 8 years after the end of the 2006-07 academic year. Initially, OSAC will set targets at 75% of the 2006-07 completion-rate targets for full-time 2- and 4-year OOG recipients. Thus, initial targets will be 15.1% for part-time community college students and 36.5% for part-time students at 4-year institutions. Generally, the higher the percentage, the greater the number of OOG grant recipients who successfully complete their programs of study within the specified time frames. Six Oregon postsecondary institutions do not report to the Clearinghouse, including two of the 40 institutions that participate in the Opportunity Grant Program -- Oregon Health and Sciences University and Marylhurst University -- each of which enrolls only a small number of OOG recipients. Since nearly all Oregon postsecondary institutions, and most other institutions throughout the country report to the Clearinghouse, conducting data matches with the Clearinghouse provides OSAC with the most comprehensive information available to-date on student completions.

## 3. HOW WE ARE DOING

This is a new KPM; actual data will not be available for at least four more years. This KPM was approved for deletion after the 2008-09 APPR.

## 4. HOW WE COMPARE

OSAC is one of only a few state agencies across the country that compile and report on performance measures for state-funded need-based student financial aid programs, and no national data are available on completion rates for part-time students. OSAC uses data from the IPEDS College Navigator website for comparisons of graduation rates for all participating schools, but IPEDS data are limited to data for full-time, first-time undergraduates. As a substitute, OSAC will compare completion rates for OOG recipients who are part time students to the completion rate for students at community colleges and 4-year institutions, as reported

in KPMs #9 and #10.

## 5. FACTORS AFFECTING RESULTS

This KPM cannot show the direct effect of the Opportunity Grant on completion rates of grant recipients because there are too many variables that affect a student's decision to persist and complete his/her programs -- upturns/downturns in Oregon's economy; changing price differentials among schools over time; family crises (e.g., death of parent, catastrophic medical costs, loss of job by primary wage-earner); changes in federal and institutional aid of various types; ease or difficulty of credit transfer; and so on. The OOG is just one element of many in providing access to higher education. In 2006-07, the first year for part-time awards, approximately 95% of OOG-eligible students at 4-year institutions were enrolled full time and 5% half time. At community colleges, 80% of OOG-eligible students are enrolled full time, and 20% half time. Few OOG recipients are enrolled half time for the full year.

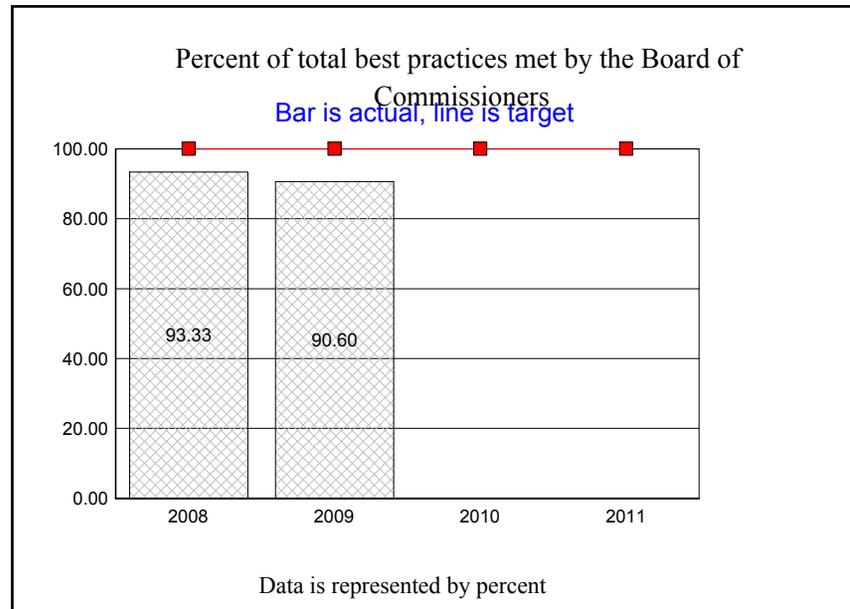
## 6. WHAT NEEDS TO BE DONE

In 2006-07, the year in which the first cohort will be identified, the Oregon Opportunity Grant made up approximately 11% of a student's average cost of attendance for the previous academic year. The award was available only to low-income students. For example, the income limit for a dependent student from a family of 4 was less than \$34,000, and the limit for a single independent student was less than \$10,000. Some research has suggested that award amounts of approximately 15% to 20% of a student's cost may have a more positive effect on an individual student's ability to complete his/her program of student, particularly for this low-income student population. An increase in award amounts and/or in the number of academic terms for which the award is available would help more grant recipients complete their programs on time. Increased program funding for 2007-09 and changes in eligibility criteria and the formula for determining award amounts that were first implemented in 2008-09 will have unknown effects on this KPM. Maximum award amounts will increase for most low-income students. Increased funding will also make awards available to some middle-income students for the first time, but OSAC has no data on this cohort group yet. Research has shown that students in higher income groups tend to have higher completion rates, so OSAC anticipates increases in actual data and possible increases in targets.

## 7. ABOUT THE DATA

The reporting cycle for this data is the Oregon fiscal year, which is the same as the academic year (July to June). This measure has been approved by the legislature for deletion beginning 2009-10 academic year.

|                       |  |      |
|-----------------------|--|------|
| <b>KPM #14</b>        | Percent of total best practices met by the Board of Commissioners. | 2008 |
| <b>Goal</b>           | Goal 1: Increase college attendance and completion in Oregon       |      |
| <b>Oregon Context</b> | Oregon Benchmarks #24, #25, #26                                    |      |
| <b>Data Source</b>    | OSAC survey of commissioners                                       |      |
| <b>Owner</b>          | Administration, Executive Director, Dennis Johnson, (541) 687-7377 |      |



### 1. OUR STRATEGY

Annually, each Commissioner has the opportunity to review the 15 best practices and individually evaluates their assessment of the Commission's performance. During a regular OSAC meeting, Commissioners discuss and compare their individual evaluations, and agree on a group evaluation. This measure should be expanded to include ODA as well as OSAC.

### 2. ABOUT THE TARGETS

In an effort to ensure the Commission is as effective as possible, OSAC has set a target of 100% for this measure.

### **3. HOW WE ARE DOING**

This is a new performance measure. We do not yet have enough data to identify trends or how best to measure best practices. The main area all Commissioner members agreed was to provide annual performance feedback of the Executive Director as well as including the performance expectations.

### **4. HOW WE COMPARE**

Comparison may be possible in the future with other education-related state agencies and agencies of comparable size.

### **5. FACTORS AFFECTING RESULTS**

OSAC plans to work with KPM coordinators and analysts to maximize this measure's potential assistance.

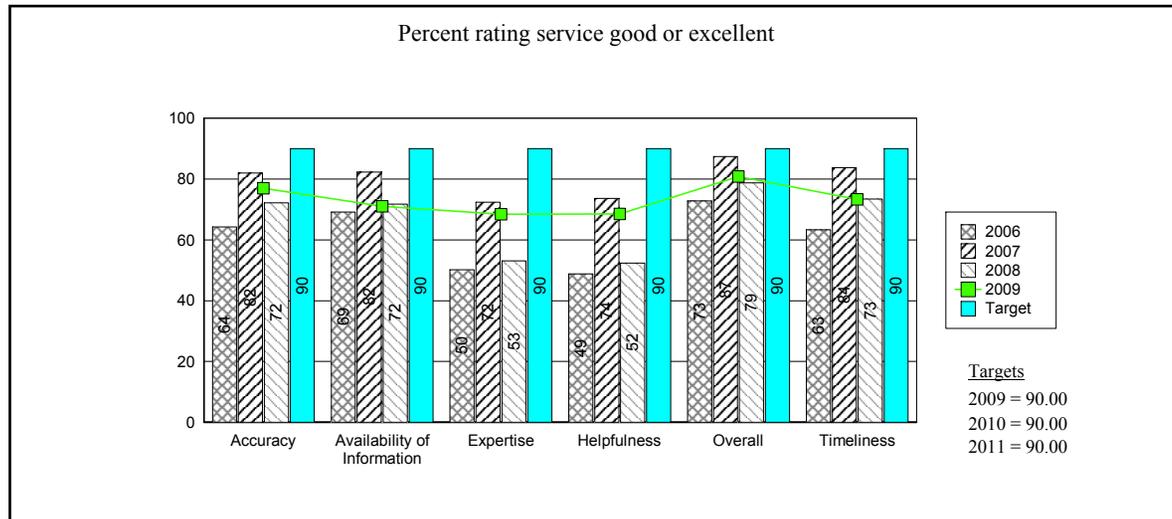
### **6. WHAT NEEDS TO BE DONE**

In the future, an annual performance feedback for the Executive Director of OSAC as well as outlining performance expectations. The Executive Director of ODA has received performance feedback and this will be handled for OSAC as well.

### **7. ABOUT THE DATA**

The reporting cycle for this measure is the Oregon fiscal year, which is the same as the academic year (July to June).

|                       |   |      |
|-----------------------|---|------|
| <b>KPM #15</b>        | Percent of customers rating their satisfaction with the agency’s customer service as “good” or “excellent”: overall customer service, timeliness, accuracy, helpfulness, expertise and availability of information. | 2007 |
| <b>Goal</b>           | Goal 1: Increase college attendance and completion in Oregon  |      |
| <b>Oregon Context</b> | Oregon Benchmarks #24, #25, #26   |      |
| <b>Data Source</b>    | Compile data from customer surveys, by program  |      |
| <b>Owner</b>          | Administration, Executive Director, Dennis Johnson, (541) 687-7377  |      |



**1. OUR STRATEGY**

FAQs published by the Progress Board on May 24, 2006, specify the required reporting format for the Customer Service KPM. The Commission replaced previous KPMs with this measure to comply with the specified format.

**2. ABOUT THE TARGETS**

OSAC set initial customer service targets at 90% for all categories. The higher the satisfaction rate, the more people have positive customer service experiences with OSAC. However, OSAC's diverse customer populations result in a wide range of responses, depending upon customers' degree of direct interaction with OSAC staff

and services. As a result, OSAC may revise some targets in the future.

### 3. HOW WE ARE DOING

On average, 89.8% of OSAC's client and constituent groups rated their overall customer satisfaction experience as "Good" or "Excellent."

### 4. HOW WE COMPARE

Comparisons may be possible if other education-related state agencies have similar customer groups.

### 5. FACTORS AFFECTING RESULTS

Due to changes in the way in which the OSAC's customer service data have been analyzed over time, previously reported customer service statistics are not comparable across years. Once a consistent methodology is applied, a clear upward trend is apparent. Overall Service 2006: 84.5%; 2007: 91.0%; 2008: 90.9%; 2009: 89.8% Timeliness 2006: 78.3%; 2007: 90.8%; 2008: 86.2%;2009:80.3% Accuracy 2006: 80.5%; 2007: 89.8%; 2008: 90.4%;2009:86.9% Helpfulness 2006: 86.0%; 2007: 87.8%; 2008: 90.9%; 2009:89.4% Expertise 2006: 88.3%; 2007: 87.6%; 2008: 92.7%; 2009:89.6% Availability of Information 2006: 81.5%; 2007: 86.1%; 2008: 85.8%; 2009:80.3% OSAC's overall service rating was 89.8% for 2009 consistent with performance in 2008, 2007 and improved from the 2006 performance. Each group surveyed interacts differently with OSAC staff members. The highest ratings came from staff members in financial aid offices across Oregon, members of scholarship selection committees, ASPIRE coordinators, and ASPIRE-AmeriCorps Site Supervisors. For this group, "don't know" responses ranged from 0% to 1.4%. Groups with increased person-to-person contact with OSAC had a lower percentage of "don't know" responses and a higher percentage of "Excellent" and "Good" than other groups. Opportunity Grant recipients and eApp filers -- both student groups -- may be familiar with some of OSAC's services, but their overall knowledge of all OSAC services is limited. This was reflected in the groups' average "don't know" responses, which ranged from 6.8% to 20.4%. As in past years, OSAC compiled surveys of Oregon Opportunity Grant recipients and OSAC e-App filers, but they were excluded from the overall survey report for 2009 because of "don't know" "none" or "a bit" of knowledge about OSAC responses averaged above 40%.

### 6. WHAT NEEDS TO BE DONE

Survey data shows the need for more OSAC outreach and public relations. For 2008, OSAC incorporated more information about its programs and services in publications distributed to Oregon high school students. OSAC added a new donor relations and marketing position in early 2008 to improve outreach efforts. Although each group surveyed has some contact with OSAC, the majority of students receiving financial aid have to dig deeply to understand where their Oregon Opportunity Grant money is coming from. To change this, OSAC began notifying students by email of their potential eligibility for Opportunity Grants in February 2008. The federal applications are also used to determine students' eligibility for Oregon Opportunity Grants. ASPIRE promotes other OSAC programs by including "A Program of the Oregon Student Assistance Commission" on all its publications and in its presentations to volunteers, students, and school staff. The current OSAC scholarship application has a full page devoted to OSAC programs. The OSAC website targeting students at [www.GetCollegeFunds.org](http://www.GetCollegeFunds.org) now has quick links to every OSAC program. The two categories in which OSAC scored lower responses were "Helpfulness" and "Expertise." This was particularly the case if respondents were unlikely to interact directly with OSAC staff members.

### 7. ABOUT THE DATA

Surveys were based on the 2008-09 school year cycle (September - June). The following groups were surveyed: scholarship selection committees (clients), students who completed OSAC's online scholarship applications, the eApp (consumers); recipients of Oregon Opportunity Grant (consumers); ASPIRE-AmeriCorps members (constituents); ASPIRE site supervisors (constituents); and financial aid officers (constituents). For students completing the online scholarship application (eApp), the customer service survey is available while the student is completing the application, as well as a pop-up option upon completion. Other groups received an email solicitation containing a link to an online survey. As mentioned above, the methodology used to analyze OSAC's customer service data has changed over time. Going forward, OSAC customer service statistics will be calculated for each respondent group as the number of "Excellent" and "Good" responses divided by the total number of responses, excluding respondents who skip the question or respond "don't know". The results for each respondent group will be averaged to generate an agency-wide statistic. As in previous years, respondent groups who have limited knowledge of OSAC's programs and services (based on the percent of "don't know, none or a bit" knowledge about OSAC responses) will be surveyed but responses will be excluded from the analysis. Overall, strengths include a large group of respondents, representation from OSAC's major customer groups, and the ability to use both paper and electronic version of the survey. Weaknesses of the data include not surveying all possible OSAC partners/customer bases, combining all the data into one total, and not being able to explain the purpose of the survey to some customer groups who were asked to complete it.

|                                       |                             |
|---------------------------------------|-----------------------------|
| STUDENT ASSISTANCE COMMISSION, OREGON | III. USING PERFORMANCE DATA |
|---------------------------------------|-----------------------------|

**Agency Mission:** To assist Oregon students and their families in attaining a postsecondary education and to enhance the value, integrity, and diversity of Oregon's college programs.

|                            |                                    |
|----------------------------|------------------------------------|
| <b>Contact:</b> Jenny Ryan | <b>Contact Phone:</b> 541-687-7416 |
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| <b>Alternate:</b> Susan Degen | <b>Alternate Phone:</b> 541-687-7451 |
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**The following questions indicate how performance measures and data are used for management and accountability purposes.**

|                                       |  |
|---------------------------------------|--|
| <p><b>1. INCLUSIVITY</b></p>          | <p>* <b>Staff :</b> OSAC's performance measures relating to operational goals were developed with directors, managers, program administrators, and other key staff. Program goals were developed with OSAC's seven Commissioners, who are Governor-appointed community volunteers.</p> <p>* <b>Elected Officials:</b> Only two of OSAC's KPMs (#1 and #2) existed in their current form prior to the 2005 Legislative Assembly. All other KPMs were modified or added in 2005 or later, including three KPMs for the Office of Degree Authorization (ODA) and four new KPMs for the Oregon Opportunity Grant (OOG). Two previous KPMs for the OOG were removed. The 2007 Legislative Assembly added an additional three measures, tracking the implementation of the OOG's Shared Responsibility Model and board of commissioner best practices. A duplicate customer service measure was added but was later deleted.</p> <p>* <b>Stakeholders:</b> OSAC collects data for KPMs related to the Opportunity Grant by conducting data matches with a number of partners, including the Oregon University System, the Department of Education's Division for Community Colleges and Workforce Development, and Oregon's independent colleges and universities.</p> <p>* <b>Citizens:</b> Staff presents KPM data and reports to OSAC's board of commissioners.</p> |
| <p><b>2 MANAGING FOR RESULTS</b></p>  | <p>Operational measures are used to determine progress toward achieving higher levels of effectiveness and efficiencies in administering agency-related programs. Program goals assist the Commissioners in measuring and communicating agency goals that relate to Oregon Benchmarks and in the development of the agency's budget. Nearly all measures are based on data collected after the close of the academic year, which coincides with the state's fiscal year. OSAC uses measures to determine ways to improve services to the students it serves.</p>   |
| <p><b>3 STAFF TRAINING</b></p>        | <p>State-sponsored training has been provided for those assigned with the responsibility for coordinating the agency's performance measure reports. KPMs are also discussed during meetings of key administrative and program staff.</p>   |
| <p><b>4 COMMUNICATING RESULTS</b></p> | <p>* <b>Staff :</b> Key staff members participate in data collection and analysis during the development process for KPMs related to their programs. All staff have access to final versions of KPM documents, which are posted on the agency website.</p> <p>* <b>Elected Officials:</b> The Executive Director discussed the agency's KPMs in presentations to various legislative committees during the 2007 and 2009 Legislative sessions. OSAC also presented updates before the interim Ways and Means Committee</p>   |

on progress of the development of new agency KPMs in January 2008.

\* **Stakeholders:** OSAC conducts data-matches with several partners to collect performance measure data. KPMs are posted on the agency website: [www.osac.state.or.us/performance.html](http://www.osac.state.or.us/performance.html). OSAC shares KPMs at public hearings during the budget development process and seeks input from the public regarding the measures and the results.

\* **Citizens:** Annual Performance Progress Reports are posted on the agency website: [www.osac.state.or.us/performance.html](http://www.osac.state.or.us/performance.html).