

STUDENT ASSISTANCE COMMISSION, OREGON

Annual Performance Progress Report (APPR) for Fiscal Year (2009-2010)

Proposed KPM's for Biennium (2011-2013)

Original Submission Date: 2010

Finalize Date: 10/25/2010

2009-2010 KPM #	2009-2010 Approved Key Performance Measures (KPMs)
2	Time to complete a degree program review.
3	Ratio of administrative dollars to private and public Scholarship dollars awarded to students.
5 a	Percentage of new program proposals requiring ODA involvement – New program application denial rate.
5 b	Total program applications processed by ODA.
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).
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.
16	Remaining financial need after known grant assistance
17	Impact of Opportunity Grants on enrollment of eligible students.

New Delete	Proposed Key Performance Measures (KPM's) for Biennium 2011-2013
	Title: Rationale:

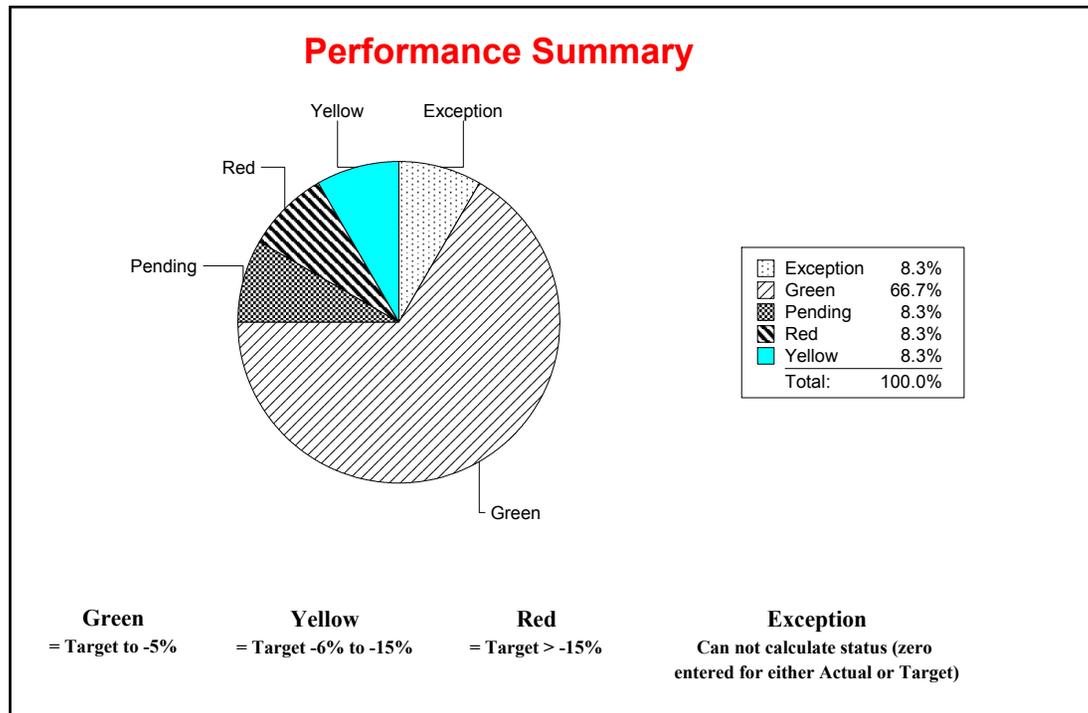
Agency Mission: To assist Oregon students and their families in attaining a postsecondary education and to enhance the value, integrity, and diversity of Oregon's college programs.

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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. In

2009-10, more than 43,100 students received over \$76.7 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 2009-10, more than 3,300 college and university students received over \$15 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 2009-10, ASPIRE worked in approximately 115 Oregon sites that serve high school students. ASPIRE staff are developing measures to track the outcomes of ASPIRE. The program is already included in the OSAC customer service survey. 2) OSAC enhanced access to training for students and families on how to fill out the Free Application for Federal Student Aid (FAFSA) by providing monthly web-based training in addition to the January statewide College Goal Oregon event.

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 and has stayed at the same rate since. 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. 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 continued to outpace available resources for 2009-10. Simultaneously, OSAC is working to expand the benefits of the ASPIRE program to all sites that serve high school students that apply to participate.

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 and beyond remains to be seen.

3. PERFORMANCE SUMMARY

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 the 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:

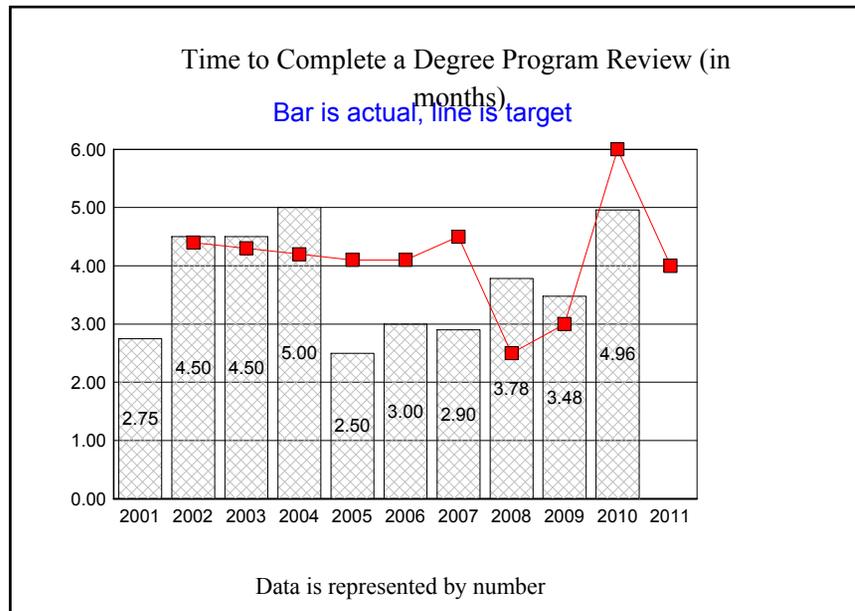
- 1.) Through early 2009, OSAC had only two staff members in the Office of Degree Authorization (ODA), so the temporary absence of a person or a large workload had a significant effect on the length of planned reviews. Most institutions with new program proposals that require ODA involvement are able to resolve problems after an exchange of information, so the percentage of programs denied is very low. (KPMs #2, #5a, #5b,)
- 2.) 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)
- 3.) 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)
- 4.) 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 #9, #10, #12, #16, #17)
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.) 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 #8, #9, #10)
- 6.) 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 does not normally interact directly with most of the students served by OSAC-administered programs. (KPM#15)

5. RESOURCES AND EFFICIENCY

Resources:2009-11 Budget Summary: General Fund - \$95,040,451, Lottery Funds - \$8,940,885 Other Funds - \$11,651,051 Other Funds Non-Ltd - \$-6,576,994, Federal Funds - \$-1,791,006.Efficiencies:

KPM #3 (Private/Public Scholarship \$\$ per \$1 Administrative) is OSAC's only clear efficiency measure. OSAC has reported on this measure since 2006. OSAC is meeting this challenge with the increased utilization of electronic tools and streamlining processes. Since 2006, scholarship dollars awarded have increased by \$2.5 million, yet the ratio of dollars awarded to administrative expense has remained fairly constant, indicating OSAC has met the challenge.

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



1. OUR STRATEGY

Review new programs first, develop ways to avoided 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 experimented with a system of contracted reviewers in 2009-10 to see if that would reduce review times. It did not, and caused considerable difficulty in managing the office, as one staff position was left vacant for a while. That position has now been filled and we have cut back the use of contractors considerably. We expect to be pretty close to our 4-month norm during the period 2011-2013. In 2010 we averaged about 5 months. In general, ODA is doing all right. With two full-time staff we can handle the work flow including all program reviews, degree evaluations for agencies and our other work.

4. HOW WE COMPARE

In 2008, 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. The other main variable is how “clean” the application is; that is, whether the school has problems that are discovered during the review.

6. WHAT NEEDS TO BE DONE

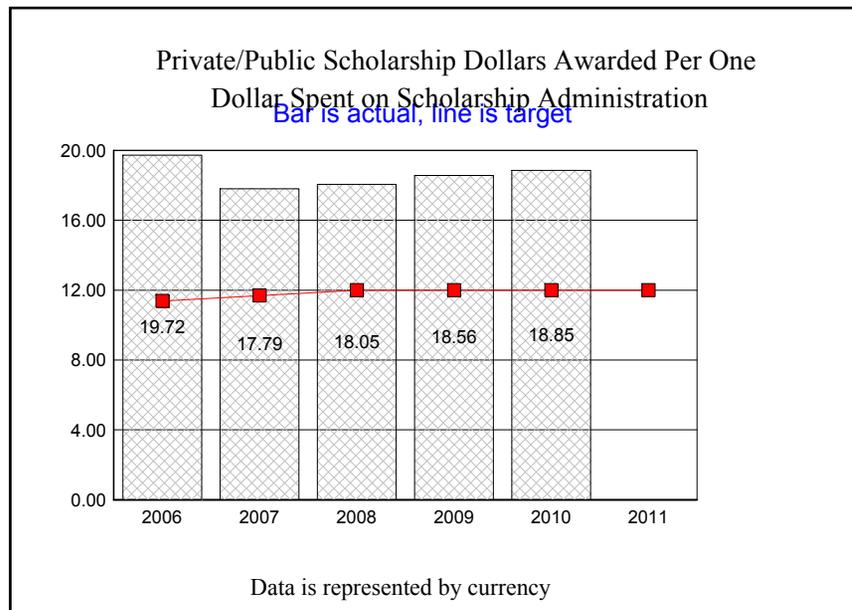
We thought that the current average turnaround time of less than four months per program could be significantly reduced through the use of contracted reviewers. We implemented such a system effective June 2009. The experiment showed that the use of contractors did not significantly reduce review times, because review times are driven largely by whether any problems or issues are discovered during the review, and how long it takes the school to respond. We therefore do not expect any significant changes in turnaround time in the future.

Legislation may be proposed to merge ODA with the private career schools unit in the Department of Education. If that is done, ODA will need to retain 2 FTE for work with degree-granting schools.

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.

KPM #3	Ratio of administrative dollars to private and public Scholarship dollars awarded to students.	2006
Goal	Goal 1: Increase college attendance and completion in Oregon	
Oregon Context	Oregon Benchmarks #24, #25, #26	
Data Source	OSAC database	
Owner	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 private individuals, employers and 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 OUS GEAR UP Program. 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 fifth 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 2009-10 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 even through the recent economic downturn. Although many trusts and endowments were reduced when investment returns diminished new funds continued to be created by individual philanthropists, community foundations and employers. OSAC utilizes a variety of technology solutions to administer the individual programs, including processing of applications, selection of awardees, student acceptance of awards, 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. 99.6% 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.

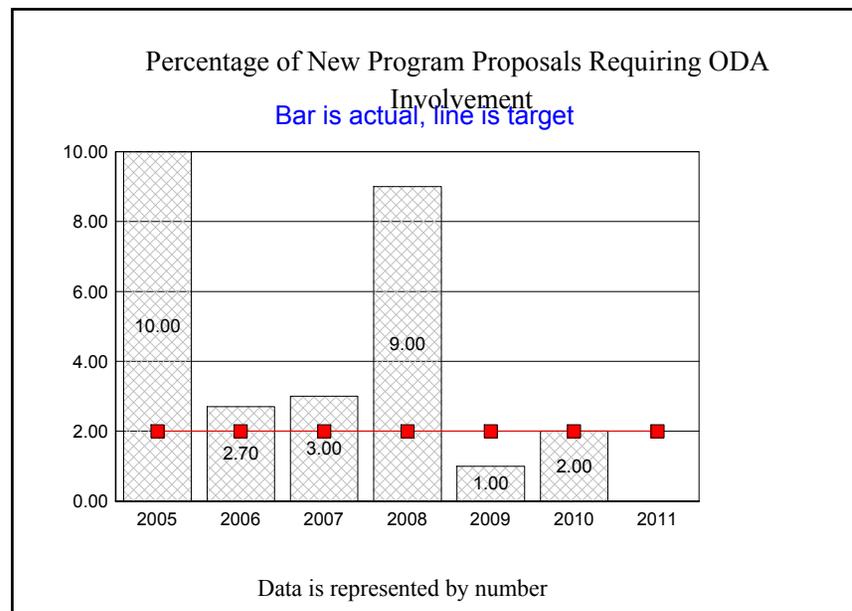
6. WHAT NEEDS TO BE DONE

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 2009-10 academic year = 2010 KPM report period.

KPM #5a	Percentage of new program proposals requiring ODA involvement – New program application denial rate.	2007
Goal	Goal 2: Protect the value of a college degree	
Oregon Context	Oregon Benchmarks #24, #25, #26	
Data Source	ODA tracking spreadsheet (contains all needed data)	
Owner	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 2011-13 is 100. 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 ten years. 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 of denials under the "section d" evaluations of non-Oregon schools that want approval for their degree use in Oregon. No applications for Section d reviews have been received in 2009-11.

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.

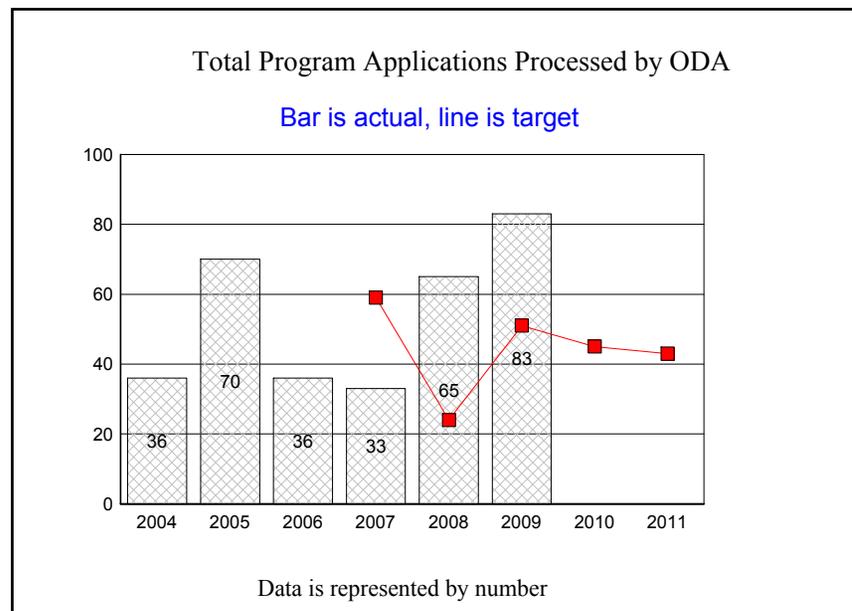
6. WHAT NEEDS TO BE DONE

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.

KPM #5b	Total program applications processed by ODA.	2007
Goal	Goal 2: Protect the value of a college degree	
Oregon Context	Oregon Benchmarks #24, #25, #26	
Data Source	ODA tracking spreadsheet (contains all needed data)	
Owner	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 100 programs during the 2011-13 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.

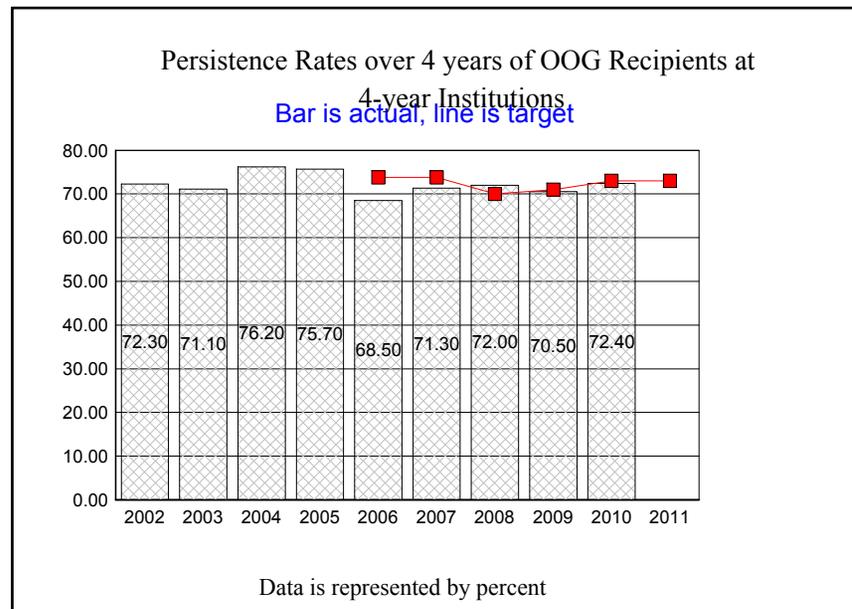
6. WHAT NEEDS TO BE DONE

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.

KPM #8	Persistence rates over 4 years for students at 4-year institutions who are eligible and awarded an OOG.	2007
Goal	Goal 1: Increase college attendance and completion in Oregon	
Oregon Context	Oregon Benchmarks #24, #25, #26	
Data Source	OSAC database of annual FAFSA records received from the U.S. Department of Education	
Owner	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 student's intent to persist toward program completion. After the end of each academic year, OSAC identifies the cohort of eligible first-year students and tracks their FAFSA filings in subsequent academic years. OSAC also compares the persistence rates of recipients (first-year students who received grant funds). In years when funding is limited, OSAC uses application deadlines as a cost-control mechanism. No application deadlines were necessary from 2005-06 through 2007-08. . Once known, OSAC posted the 2009-10 application deadline on its websites with the grant award estimator. 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 2006-07 and filed FAFSAs through 2009-10.

2. ABOUT THE TARGETS

Persistence rates for 2010 are for first-year students in 2006-07 who continued to file FAFSAs for four consecutive years, through 2009-10. 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. 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 academic year 2009-10, the persistence rate has stayed constant at 72.4%. However, in the second year of the 2009-11 biennium, because of the surge in enrollment and decrease in appropriation, a significantly lower actual persistence rate than targeted may be the result.

3. HOW WE ARE DOING

The effect of funding increases in the 2007-09 biennium and Shared Responsibility Model implementation on persistence rates is not yet 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 72% after four years for Opportunity Grant recipients compare very favorably with the average retention rate of 74% after just two years for students at 4-year institutions.

5. FACTORS AFFECTING RESULTS

For nearly every year of the past 6 or 7 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; and changes in the formula used to calculate Oregon Opportunity Grant awards under the 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.

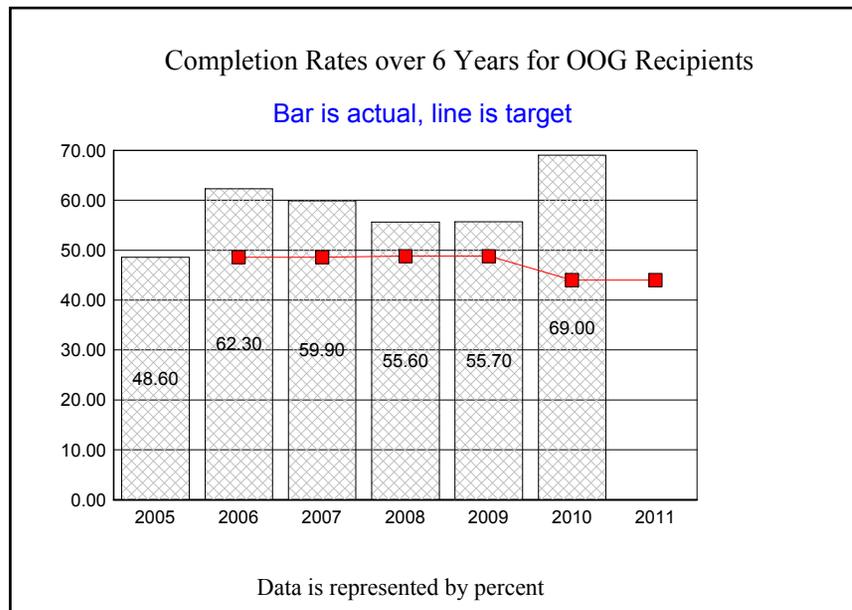
6. WHAT NEEDS TO BE DONE

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 third year of a significant program expansion just ended, and during this past year, the number of students applying for the Oregon Opportunity Grant has increased by approximately 40%. However, for the 2009-11 biennium, the funding appropriation was decreased, and it has limited the number of eligible full-time and part-time students who will receive grant funds for 2010-11. OSAC has set FAFSA filing dates for the 2010-11 academic year in order to more accurately determine the number of eligible applicants that can be served with the remaining portion of the appropriation. Due to a variety of factors including the downturn in the economy, the large surge in enrollment, the changes to the Oregon Opportunity Grant, and the decrease in the appropriation for the 2009-11 biennium, it is too early to determine the true effects on persistence rates.

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).

KPM #9	Completion rates (graduated within 6 years) for students at 4-year institutions who are eligible and awarded an OOG.	2007
Goal	Goal 1: Increase college attendance and completion in Oregon	
Oregon Context	Oregon Benchmarks #24, #25, #26	
Data Source	OSAC database; National Student Clearinghouse	
Owner	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. In years when funding is limited, OSAC has used application deadlines as a 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. The US Department of Education requires all Title IV schools to report graduation rates for all full-time students who 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 2009-10. 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 September. 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. 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

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 occurred before 2005-06, but 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, which continued in the 2009-10 academic year, OSAC may not be able to determine trends for several more years. It is possible the increase in the graduation rate for this cohort year may be attributed to the availability of a fully-funded Opportunity Grant program during the first three years of attendance (2004-05 through 2007-08). However, future rates may be affected by the decreases in appropriation and increases in demand due Oregon's poor economic conditions.

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 44% for the 2003-04 cohort (graduated by 2008-09). 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 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 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. Another factor that affects results is that the cohort group for each year's KPM actually started their academic program six years prior to the report of the KPM (for this report, this cohort started in the 2004-05 academic year). Changes in the Opportunity Grant since this cohort's start date may or may not have had a true impact on completion of the academic program.

6. WHAT NEEDS TO BE DONE

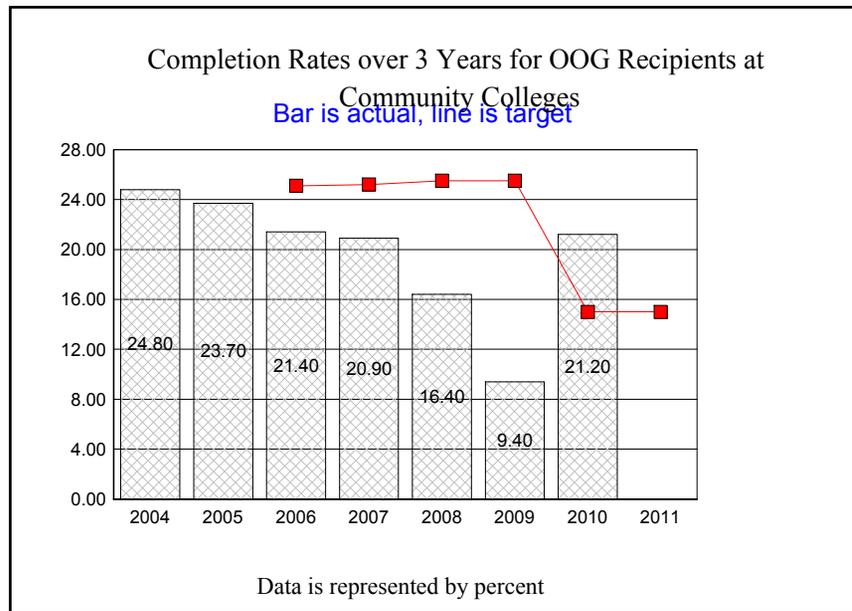
Until 2008-09, the Opportunity Grant was equal to approximately 11% of a student's average cost of attendance for the previous academic year, and the award was available only to low-income students (i.e., students with annual family incomes of less than \$35,000). Some research has suggested that award 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 the 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. In the 2009-10 academic year, because of the decrease in the allocation for the program and a statewide increase in attendance at Oregon's postsecondary institutions, maximum awards were reduced to \$2675 for students attending 4-year public and private institutions and remained at \$2600 for students attending community colleges. These factors may result in decreased graduation rates over the next few years. An increase in the appropriation for the Oregon Opportunity Grant during the 2011-13 biennium may help to keep the graduation rates at this new higher rate.

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).

KPM #10	Completion rates (graduated within 3 years) for students at community colleges who are eligible and awarded an OOG.	2007
Goal	Goal 1: Increase college attendance and completion in Oregon	
Oregon Context	Oregon Benchmarks #24, #25, #26	
Data Source	National Student Clearinghouse	
Owner	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 funding is limited, OSAC has

used application deadlines as a 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. The US Department of Education requires all Title IV schools to report graduation rates for all full-time students who 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 2007-08 who completed their programs by 2009-10. 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 September. Over time, this will provide an indicator of the effectiveness of Opportunity Grants for students enrolled at 2-year institutions.

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 (i.e. within three 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

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 occurred before 2005-06, but 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, which continued in the 2009-10 academic year, OSAC may not be able to determine trends for several more years. It is possible the increase in the graduation rate for this cohort year may be attributed to the availability of a fully-funded Opportunity Grant program during the first three years of attendance (2004-05 through 2007-08). However, future rates may be affected by the decreases in appropriation and increases in demand due Oregon's poor economic conditions.

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. 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. A comparison of 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 shows that for the 2009-10 academic year, the completion rate of Opportunity Grant recipients is 8.2% higher than the average of completion rates reported to IPEDS. However, the data gathered from IPEDS is only available through the end of the 2008-09 academic year. We are unable to do a direct comparison of academic years.

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

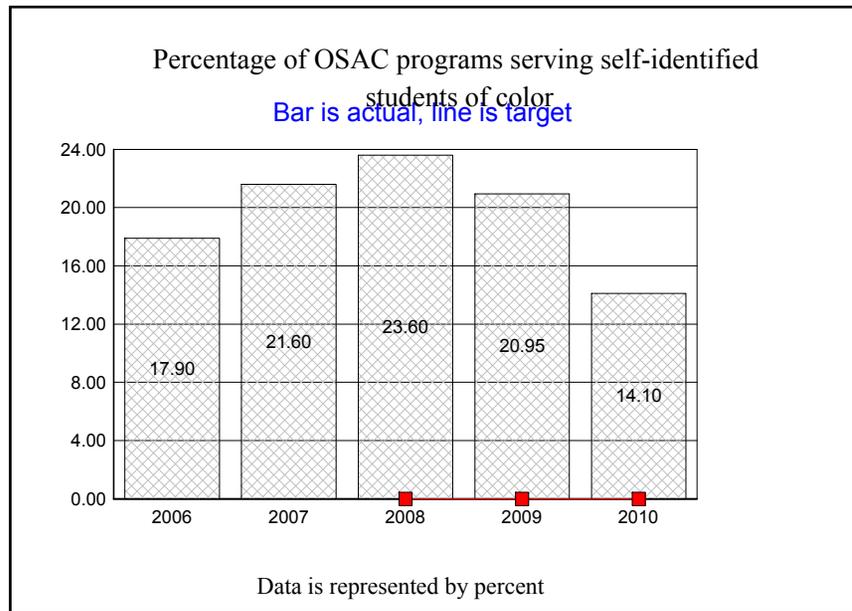
Until 2008-09, the Opportunity Grant was equal to approximately 11% of a student's average cost of attendance for the previous academic year, and the award was available only to low-income students (i.e., students with annual family incomes of less than \$35,000). Some research has suggested

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 the 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. In the 2009-10 academic year, because of the decrease in the allocation for the program and a statewide increase in attendance at Oregon's postsecondary institutions, maximum awards were reduced to \$2675 for students attending 4-year public and private institutions and remained at \$2600 for students attending community colleges. These factors may result in decreased graduation rates over the next few years. An increase in the appropriation for the Oregon Opportunity Grant during the 2011-13 biennium may help to keep the graduation rates at this new higher rate.

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.

KPM #12	Percentage of students of color served by OSAC programs (i.e., disaggregate measures to track race/ethnicity of beneficiaries of OSAC program services).	2005
Goal	Goal 1: Increase college attendance and completion in Oregon	
Oregon Context	Oregon Benchmarks #24, #25, #26	
Data Source	Varies by program: Scholarship Services application; Oregon Opportunity Grant data matches with institutions and segments	
Owner	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) and the Community College and Workforce Development division (CCWD) of the Oregon Department of Education, 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. At the time of this report on 2010 KPMs, the 2010 census data were not yet available. However, the US Census website includes data from the American Communities Survey from 2006-2008, which show some slight changes in the percentages for the state of Oregon: 86.2% white, 1.71% African-American, 10.6%Hispanic/Latino, 1.8% Native American/Alaskan Native, and 3.8% Asian/Pacific Islander. Their data also includes 3.2% who consider themselves some other race and 3.3% who identify themselves as two or more races.

3. HOW WE ARE DOING

Effective first for data reported for the 2009-10 academic year, all postsecondary institutions that participate in federal Title IV student financial aid programs and report to the Integrated Postsecondary Education Data System (IPEDS) had to comply with new data collection and reporting requirements. For **collecting** R/E data, institutions **must** use a two-question format: 1) whether the respondent is Hispanic/Latino and 2) whether the respondent is from one or more races from the following list: American Indian or Alaska Native, Asian, Black or African American, Native Hawaiian or Other Pacific Islander, White. Schools are not permitted to include "Schools must use the following seven categories to report aggregate R/E data to the Department: Hispanics of any race, American Indian or Alaska Native, Asian, Black not-Hispanic, Native Hawaiian or Other Pacific

Islander, White not-Hispanic, and two or more races. Because of these changes, OSAC cannot compare 2010 data with prior-year data.

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. Recent changes by the U.S. Census to R/E categories may affect data comparisons.

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

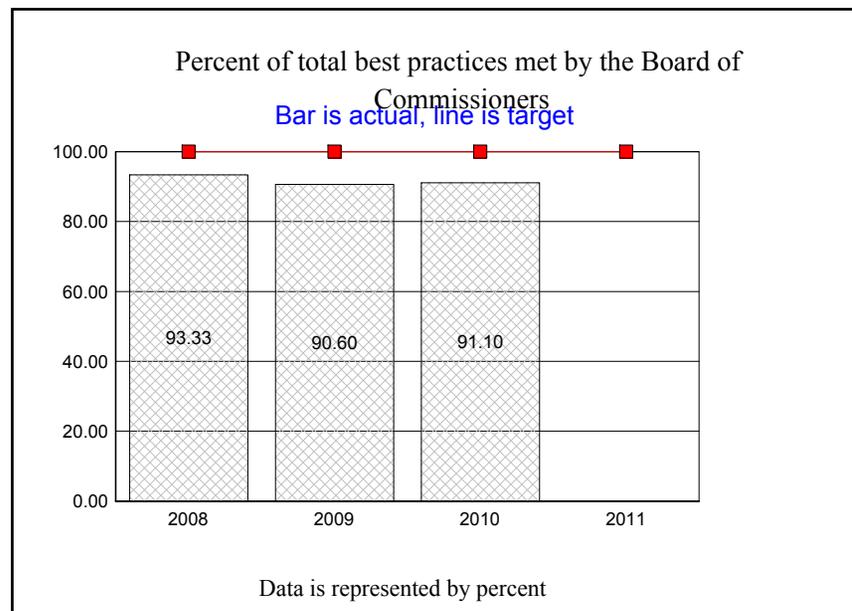
The agency must continue outreach efforts to Oregonians about OSAC-administered grants and scholarship and about financial aid information in general. These efforts should consider social marketing strategies to reach students of color and other underserved groups. OSAC participates in events such as College Goal Oregon (CGO), started in 2007 on 15 campuses statewide to 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, more than 2,400 students in 2009, and more than 2200 students in 2010. During the four-year history of CGO events, the number of sites where the event has been held has increased from 15 in 2007 to 25 in 2010. Such events include a number of social marketing strategies to reach underserved students, including the following: 1) Utilize social networks to reach students and their families, using regional committees 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.

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



1. OUR STRATEGY

Annually, each Commissioner has the opportunity to review the 15 best practices and individually evaluate their assessment of the Commission’s performance., Commissioners are given the opportunity to review the results of the group evaluation.

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 relatively new performance measure. We do not yet have enough data to identify trends or how best to measure best practices. The Commissioners are in agreement about ensuring annual performance feedback of the Executive Director as well as including the performance expectations. The hiring of a new Executive Director will provide the opportunity to ensure clarity in this area.

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.

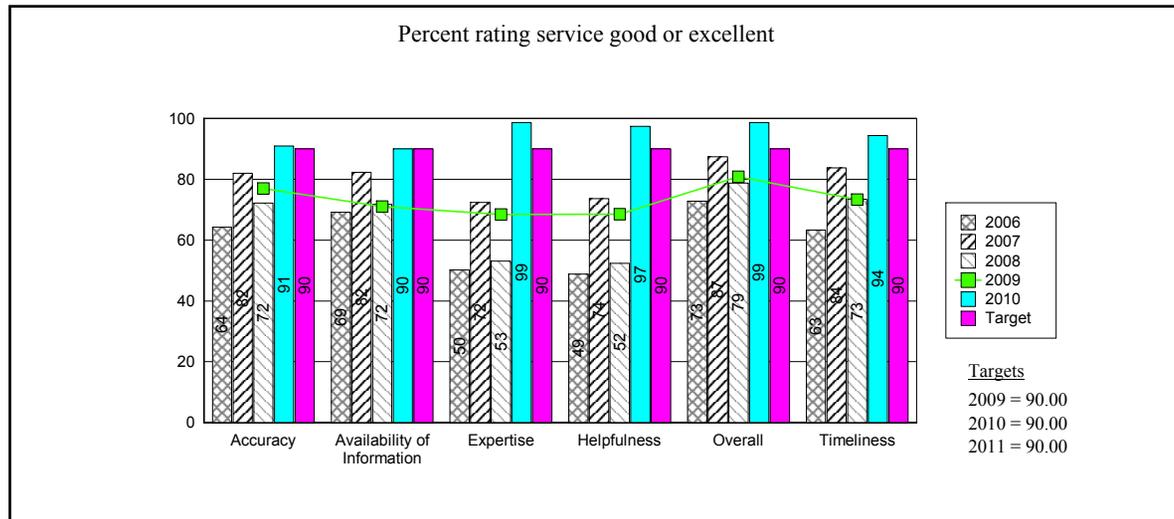
6. WHAT NEEDS TO BE DONE

There needs to be a clear annual performance feedback structure for the Executive Director of OSAC as well as outlining performance expectations... Currently, the ODA Administrator reports to the Commission. Either the reporting relationship should be changed, or the organizational placement of ODA should be changed.

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).

KPM #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.	2007
Goal	Goal 1: Increase college attendance and completion in Oregon	
Oregon Context	Oregon Benchmarks #24, #25, #26	
Data Source	Compile data from customer surveys, by program	
Owner	Administration, Interim Executive Director, Mike Marsh, (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, 98.75% of OSAC's client and constituent groups rated their overall customer satisfaction experience as "Good" or "Excellent" for 2010.

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%; 2010: 98.7%

Timeliness 2006: 78.3%; 2007: 90.8%; 2008: 86.2%; 2009:80.3%; 2010: 94.4%

Accuracy 2006: 80.5%; 2007: 89.8%; 2008: 90.4%; 2009 86.9%; 2010: 90.9%

Helpfulness 2006: 86.0%; 2007: 87.8%; 2008: 90.9%; 2009: 89.4%; 2010: 97.4%

Expertise 2006: 88.3%; 2007: 87.6%; 2008: 92.7%; 2009: 89.6%; 2010: 98.7%

Availability of Information 2006: 81.5%; 2007: 86.1%; 2008: 85.8%; 2009:80.3%; 2010: 90.0%

OSAC's overall service rating was 98.7% for 2010 improving over performance in 2008, 2007 and 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, and ASPIRE Coordinators. For this group, "don't know" responses ranged from 0% to 3.4%. 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.

Oregon 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 7.1% to 30.1%. 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 2010 because of "don't know" "none" or "a bit" of knowledge about OSAC responses averaged above 40%.

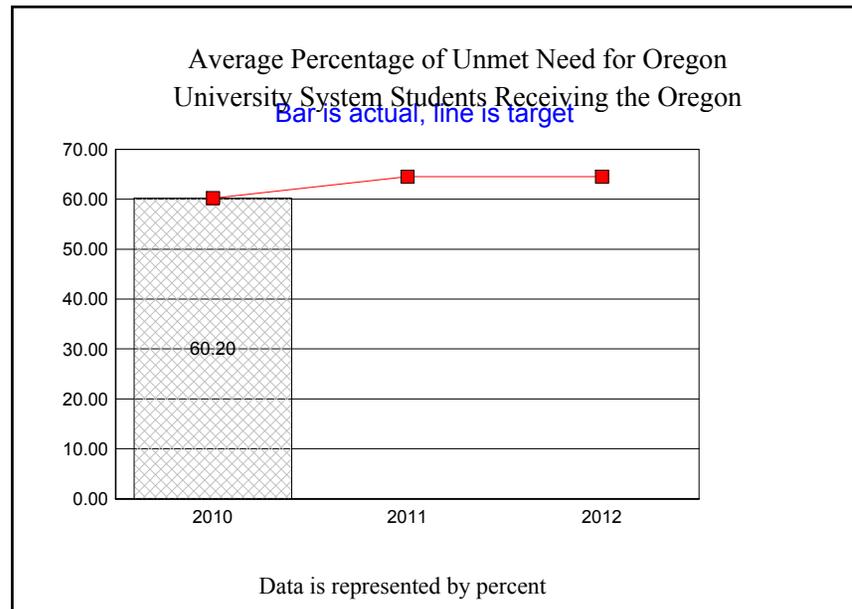
6. WHAT NEEDS TO BE DONE

Survey data show OSAC's efforts to increase information to the public still having a mixed result. 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. Email notifications to students did not go out for the 2009-10 academic year because funds were exhausted earlier in the year due to increased demand. . 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 for students — 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 2009-10 school year cycle (September - June). The following groups were surveyed: scholarship selection committees (clients), students who completed OSAC's online scholarship applications, eApp (consumers); recipients of Oregon Opportunity Grant (consumers); 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.

KPM #16	Remaining financial need after known grant assistance	2010
Goal	Increase college attendance and completion in Oregon	
Oregon Context	Oregon Benchmarks #24, #25, and #26	
Data Source	OSAC will determine average cost of attendance for both sectors from data made available by the Oregon University System, the Oregon community colleges. Congress determines the maximum Federal Pell Grant, and the Commission sets the maximum Oregon Opportunity Grant amounts. OSAC will retrieve and verify accuracy of data on an annual basis.	
Owner	Oregon Opportunity Grant Program, Susan Degen, Administrator, (541) 687-7451	



1. OUR STRATEGY

The 2007 Legislature directed the Commission to create a measure to track the impact of the adoption of the Shared Responsibility Model (SRM),

the new formula used to disburse Oregon Opportunity Grant (OOG) awards. The SRM's stated goal is to eliminate the student's affordability gap for postsecondary education (i.e., the remaining financial need that students face after receipt of state and federal financial aid). OSAC's new performance measure tracks the amount of an OOG recipient's unmet financial need as a percentage of the student's total cost of attendance (COA) for Oregon's neediest community college and public university students—those eligible to receive a maximum Federal Pell Grant and a maximum Oregon Opportunity Grant. This is the first year of reporting for this new KPM.

2. ABOUT THE TARGETS

OSAC has just begun to receive preliminary data on the newly implemented Shared Responsibility Model and this is the first year of reporting this revised KPM. Based on the 2009-11 appropriation, the upsurge in FAFSA filers, and the downturn in Oregon's economy, a target of 65% for 2011 and 2012 is reasonable. For purposes of the graph, to maintain a standardized data set, OSAC is using data regarding Oregon's public university students. This is because the Oregon Legislature sets a maximum increase percentage for Oregon University System (OUS) costs of attendance. Oregon's community colleges set their own costs of attendance and the costs may fluctuate widely based on the community and the local economy where the community college is based. However, community college information is included in this narrative.

3. HOW WE ARE DOING

The OOG was expected to greatly lower the amount of unmet need in 2008 with the implementation of the Shared Responsibility Model (SRM) and increased state support. Although only represented on the graph for the 2009-10 academic year for OUS, for this first year of the KPM, OSAC compared changes in the percentage between the 2008-09 academic year and 2009-10 academic year between the community college and state 4-year institutions. In the community college sector, the results show that remaining need was decreased by 1.8 percent for those full-time students receiving an OOG award. However, over the same time period, for public 4-year institutions in the Oregon University System the percentage of average remaining need increased by an almost negligible .05 percent (from 59.7 percent in 2008-09 to 60.2 percent in 2009-10). We will not know the actual trend until we have more data to analyze over the next few years.

Remaining Unmet Need by Percentage and Sector
2008-09 – OUS 59.7%; Community Colleges 51.3%
2009-10- OUS 60.2%; Community Colleges 49.5%

4. HOW WE COMPARE

This KPM is still being developed. In February 2005, OSAC surveyed other state agencies that administer state-funded need-based grants programs. At that time, OSAC was farther along in developing key performance measures than any other state agency in the country. OSAC will initiate a new survey in fall 2010 to find out if any other states have added comparable program measures.

5. FACTORS AFFECTING RESULTS

Developing a strategy for this KPM is challenging, in part, because of the lack of control OSAC has over program funding, college enrollment, the number of qualified applicants, and the average cost of attendance. Tuition and fees have risen at rates surpassing increases to the state median family income, inflation, and increases in state funding for the program (a report released August 2010 by the Institute of Education Sciences reports that between 2001 and 2010, across the country, 4-year public institutions reported a 46-percent increase in average in-state tuition and fees, and over the same period, 4-year private not-for-profit institutions reported a 31-percent increase). Additionally, the Federal Pell Grant program is dependent upon Congress for funding levels and award maximums. .

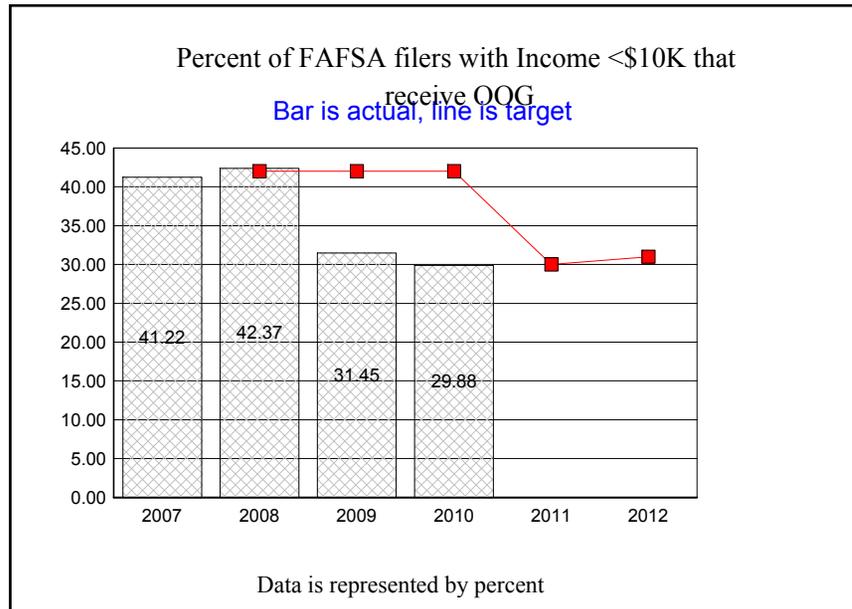
6. WHAT NEEDS TO BE DONE

Although OSAC completed a significant program expansion and change in award calculation methodology during the 2008-09 academic year, a decrease in appropriation for the program during 2009-11 biennium combined with significant increases in both college enrollment and in tuition and fees have made it is too early to be able to determine the true effects . The true effects may not be known until the downturn of Oregon's economy reverses.

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).

KPM #17	Impact of Opportunity Grants on enrollment of eligible students.	2007
Goal	Increase college attendance and completion in Oregon	
Oregon Context	Oregon Benchmarks #24, #25, and #26	
Data Source	OSAC will retrieve all necessary data from the agency's database. The majority of the data are received from the U.S. Department of Education following students' submittals of completed FAFSAs. OSAC will then determine the percentage of all FAFSA filers who are viable grant recipients by income sector (i.e., \$0-9,999; \$10,000-19,999; \$20,000-\$29,999; \$30,000-\$39,999; \$40,000-49,999; \$50,000-59,999; \$60,000-69,999; and \$70,000+).	
Owner	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. Targets for 2010 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.

3. HOW WE ARE DOING

The Oregon Opportunity Grant (OOG) has gone through a series of complex changes since we began reporting this KPM in 2005, including increases and decreases in appropriations, program expansion to half-time students, and significant changes in the way the grants are calculated based on the Shared Responsibility Model (SRM). The program saw a gradual increase in all income levels served through the 2008 academic year, most significantly in the lowest three income ranges. With the institution of the SRM in 2009, those groups with income ranges starting at \$10,000 to \$19,999, up to \$60,000 to \$69,999 saw significant increases. These increases reflected the attempts by the SRM to provide grants to students in both low- and middle-income families. However, during the past academic year (2009-2010), all income ranges have seen a decrease in the percentage of financial aid applicants (FAFSA filers) who received the OOG. These decreases have occurred because of a drastic increase in the number of students attending school, a decrease in the appropriation for the OOG program for the 2009-11 biennium, and changes instituted by the Federal government for the Pell Grant.

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 - 31.45%; 2010 - 29.88%
 \$10,000-\$19,999: 2005 - 21.75%; 2006 - 27.47%; 2007 - 33.06%; 2008 - 32.19%; 2009 - 37.11%; 2010 - 36.80%
 \$20,000-\$29,999: 2005 - 17.73%; 2006 - 22.46%; 2007 - 26.63%; 2008 - 26.31%; 2009 - 29.53%; 2010 - 28.88%
 \$30,000-\$39,000: 2005 - 10.37%; 2006 - 11.75%; 2007 - 13.82%; 2008 - 13.77%; 2009 - 32.47%; 2010 - 22.31%
 \$40,000-\$49,000: 2005 - 1.46%; 2006 - 2.62%; 2007 - 3.65%; 2008 - 4.01%; 2009 - 29.54%; 2010 - 13.70%
 \$50,000-\$59,999: 2005 - 0.00%; 2006 - 0.00%; 2007 - 0.20%; 2008 - 0.38%; 2009 - 21.22%; 2010 - 2.27%
 \$60,000-\$69,000: 2005 - 0.00%; 2006 - 0.02%; 2007 - 0.07%; 2008 - 0.27%; 2009 - 10.36%; 2010 - 1.43%

\$70,000 or greater: 2005 - 0.01%; 2006 - 0.02%; 2007 - 0.06%; 2008 - 0.06%; 2009 - .49%; 2010 - .38%

4. HOW WE COMPARE

Based on results of a 2008 survey of other agencies in other states that administer state-funded need-based grant programs, OSAC is 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 changed with implementation of the Shared Responsibility Model in 2008-09. For each financial aid applicant, the Federal government calculates a "expected family contribution" (EFC), which is an indication of a student's ability to contribute to the cost of college based on the family's financial resources. The US Department of Education increased the income limits used to determine automatic eligibility for a \$0 EFC from \$15,000 to \$20,000 in 2008-09, and increased the limits to \$30,000 for 2009-10. This resulted in more students being eligible for maximum awards at higher incomes than before. A decrease in the total appropriation for the Oregon Opportunity Grant for the 2009-11 biennium, combined with a major upsurge in enrollment due to the downturn in Oregon's economy, resulted decreases in the percentage of students who receive the Oregon Opportunity Grant versus those who filed the FAFSA. As these changes occurred, it has become necessary to set FAFSA filing deadlines earlier and earlier each year in order to spread the limited grant funds among eligible FAFSA filers. Because of all of these factors, it is difficult to determine when or if an improvement in the economy will reverse the current downward trend.

6. WHAT NEEDS TO BE DONE

Although there was an increase in funding for the 2007-09 biennium and the Shared Responsibility Model was implemented in the 2008-09 academic year, there was a decrease in the appropriation for 2009-11. Additional funding is requested for 2011-13 to assist more 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).

STUDENT ASSISTANCE COMMISSION, OREGON	III. USING PERFORMANCE DATA
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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.

Contact: Peggy Cooksey	Contact Phone: 541-687-7443
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Alternate: Susan Degen	Alternate Phone: 541-687-7451
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The following questions indicate how performance measures and data are used for management and accountability purposes.

1. INCLUSIVITY	<p>* Staff: 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>* Elected Officials: Only one of OSAC's KPMs (#2) existed in its 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>* Stakeholders: 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>* Citizens: Staff presents KPM data and reports to OSAC's board of commissioners.</p>
2 MANAGING FOR RESULTS	<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>
3 STAFF TRAINING	<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>

4 COMMUNICATING RESULTS

* **Staff:** 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.

* **Elected Officials:** 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 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: <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: <http://www.osac.state.or.us/performance.html>