

STUDENT ASSISTANCE COMMISSION, OREGON

Annual Performance Progress Report (APPR) for Fiscal Year (2010-2011)

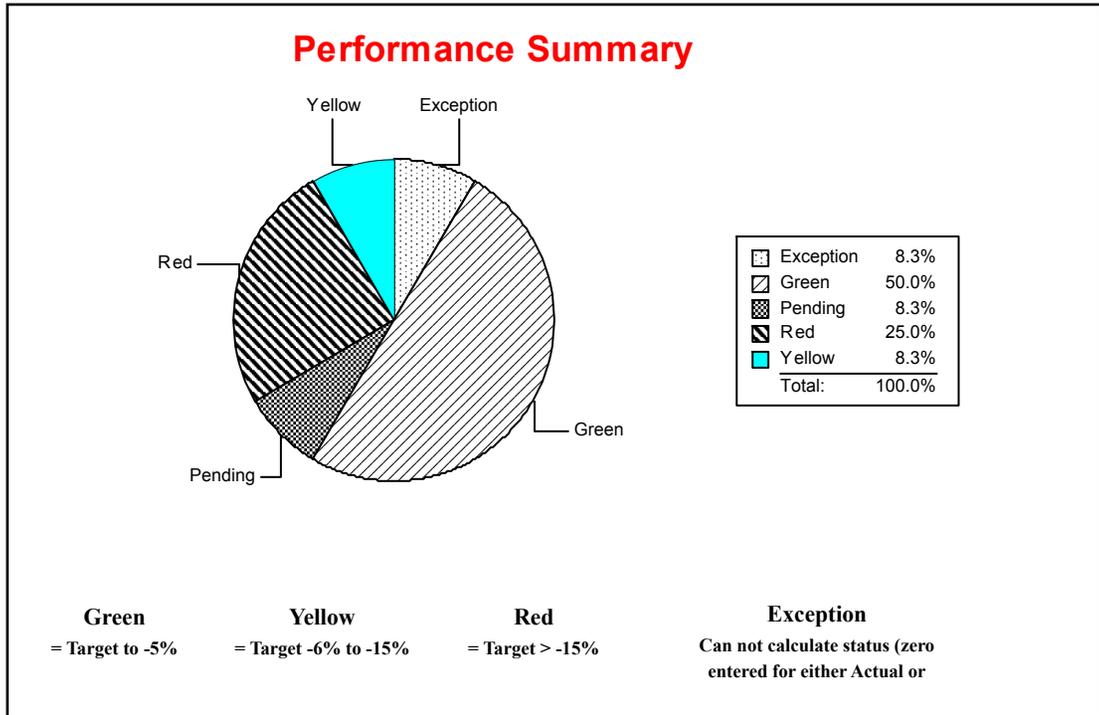
Original Submission Date: 2010

Finalize Date: 11/8/2011

2010-2011 KPM #	2010-2011 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:

STUDENT ASSISTANCE COMMISSION, OREGON		I. EXECUTIVE SUMMARY	
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 the 2009-11 biennium, more than 56,700 students received over \$95.5 million in Opportunity Grants. LEAP has now been eliminated by the federal government and Lottery Funds are reduced for 2011-13.

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 3,022 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 2010-11, ASPIRE worked in approximately 125 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 20% rate since 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. 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 2010-11.

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 2009-11 biennium and again for the 2011-13 biennium, the Commission has several goals of which the following three goals related to its mission are the highlights: 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 2011-13 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.

4. CHALLENGES

OSAC faces challenges uniquely related to its diverse programs and the KPMs for these programs, as noted below:

1.) The retirement of the Administrator of the Office of Degree Authorization (ODA), resulted in one staff member handling the workload of a normal staff of two. This has increased

the turnaround of program reviews. The percentage of programs denied is very low. Most institutions with new program proposals that require ODA involvement are able to resolve problems after an exchange of information and avoid denials. (KPMs #2, #5a, #5b.)

2.) Oregon is unique in providing 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.) To collect data on student race-ethnicity, program completions, or enrollment 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)

4.) 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)

5.) Defining OSAC's customers is unique given that we serve students and yet have little interaction. 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. (KPM#15)

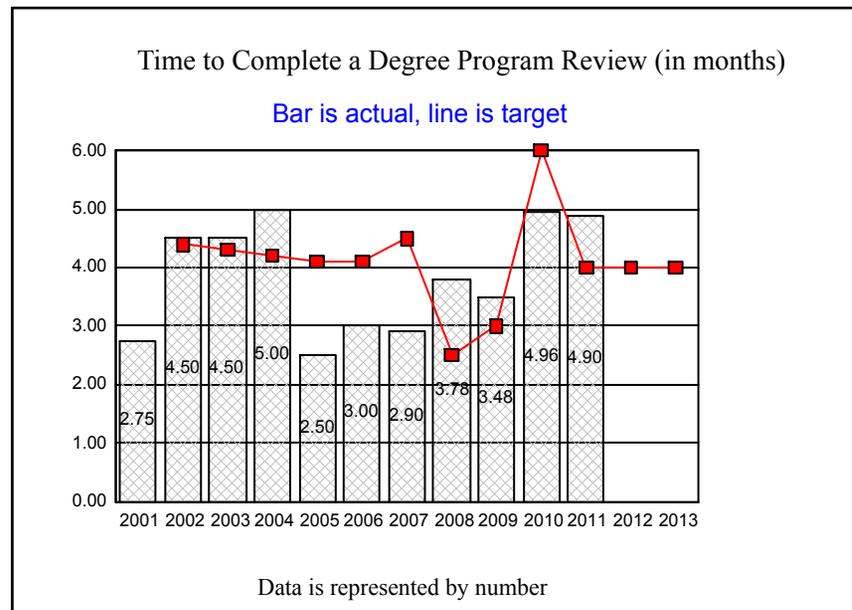
5. RESOURCES AND EFFICIENCY

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 Database	
Owner	Office of Degree Authorization (ODA), Jennifer Diallo, Interim Administrator, (541) 687-7478	



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

Despite the significant challenges during this fiscal year (2010-2011) due to understaffing and increased workload, ODA managed to keep the time to review at 4.9 months, which is still within the 4-6 month timeframe allowed. We expect to be within the 4-6 month norm during the period 2011-2013, but due to a shortened review cycle and a high, and continually increasing, number of applications we will need full staffing, as well as temp staff to keep up with online program applications, and contractors to complete these reviews on time.

ODA's work load and scope has changed significantly during this fiscal year, due to changes in federal regulations that now require schools to show state approval for all programs delivered to students in the state, whether on campus or online. While ODA has always been responsible for oversight of out-of-state programs offered to Oregon students, we have not had a review or recordkeeping process. Due to the new federal requirements, quite a large amount of time was spent during this fiscal year in discussions within ODA, with other states, and with the US Dept of Ed to understand the expectations for state oversight and determine the best way to meet our responsibility to provide evidence of approval for federal financial aid purposes. There were more than 300 schools that contacted ODA with inquiries and/or applications for approval to offer online degree programs to Oregon students, and this delayed processing of program reviews.

A staffing shortage occurred with retirement of the ODA Administrator on March 31, 2011.

In general, ODA is stretched beyond its staffing capacity. Even with two full-time staff it will be difficult to handle the increase in work load.

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. Of note, is that those states that conduct program evaluations similar in nature to the ODA review process are generally doing so in a similar timeframe. Minnesota, Missouri, and Ohio would be relatively similar to Oregon in terms of their in-depth review process; all of these report a time to review in the 4-6 month range expected in Oregon.

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 other renewals are held up for a while. This has a negative effect on ODA fee revenues, if the existing programs are held up for very long, as the grace period unnaturally extends the approval period, and delays the next review cycle consequently, pushing the anticipated fee revenue further into the future.

The other main variable is how "clean" the application is - whether the school has problems that are discovered during the review. Recently, we have noticed more issues during reviews of existing programs than in past years. This trend appears to correlate with two things: 1- a concurrent rise in applications for occupationally-oriented Associate's degree

programs; and 2- the insertion of online courses taught by another provider in programs offered at an Oregon campus.

6. WHAT NEEDS TO BE DONE

The time to review is not entirely under our control, but is driven largely by problems or issues encountered during the review, and how long it takes the school to respond or to react to ODA requirements to meet the established standards. We cannot realistically reduce the time to review to less than 4 months. Use of contractors engenders additional layers of communication that also require staff time and can delay timely completion of reviews.

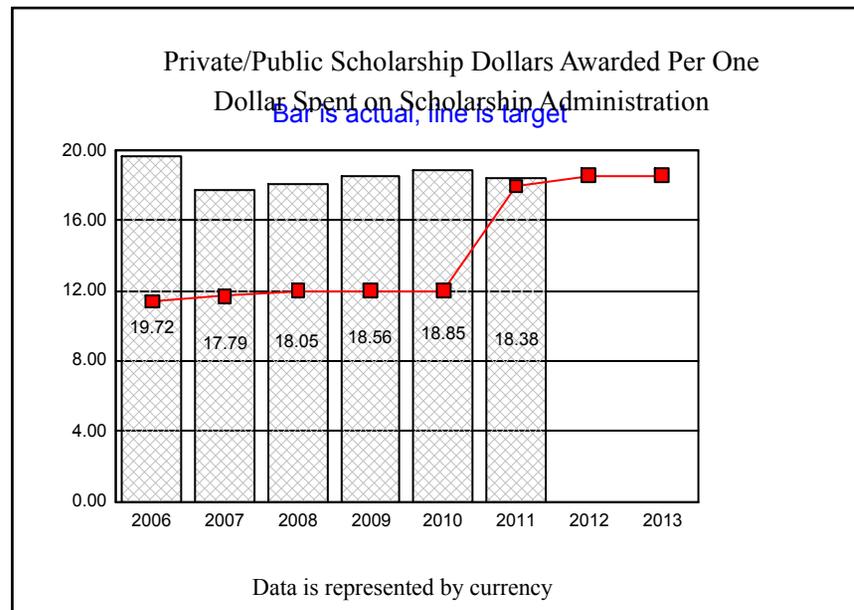
In response to the increased tendency for programs to go “off-course” during the three year renewal cycle that we had used as a standard, ODA has shortened the standard review cycle to two years, to allow for more frequent and consistent evaluation of existing programs. A side benefit of aligning review fee revenues to the biennial budget cycle is increased stability of ODA’s fee revenues, which fund our operational expenses, including some staffing.

Some actions taken to increase efficiencies in the review process are:•□□□□□□ Revision of forms to reduce redundancy•□□□□□□ Development of a web portal application to reduce the redundant data entry inherent in the existing process. We expect this web portal to be fully functional by July 2012, when ODA is scheduled to be moved to the new higher education oversight body.

7. ABOUT THE DATA

ODA applications are currently tracked in a database. Review dates, schedules, and projected revenue data can theoretically be generated from the database. 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, Vic Nunenkamp, Director, (541) 687-7385	



1. OUR STRATEGY

The KPM's goal is to drive an increase efficiency in the processing and awarding of scholarships. This KPM compares scholarship administrative costs (personal services plus services & supplies) from Other Funds to total scholarship dollars disbursed to students. The rate is calculated by determining the total dollars awarded in scholarship programs and dividing that amount by the total dollars spent in administration. The ratio is lowered as the scholarship dollars increase.

2. ABOUT THE TARGETS

Targets:

The first targets for this measure were set in 2006. The original target was set without benefit of historical data or industry standards. With 6 years of data, we now know that 18 is an appropriate target for which to strive..

3. HOW WE ARE DOING

The ratio declined this year and is closer to the target of 18.

4. HOW WE COMPARE

Community foundations have estimated that administrative costs range from five to twenty percent of the programs (Source: Council on Foundations). OSAC's 2010-11 administrative charge for most programs was calculated at 11% of the amount of the scholarship awarded. (The 11% is not deducted from the scholarship award.)

5. FACTORS AFFECTING RESULTS

Scholarships have 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. The bottom line is that while the scholarship dollars remain the same, the number of scholarships has grown and efficiency is reduced.

OSAC continues to recognize process efficiencies through constant improvement of electronic solutions. However, the manual review of transcripts drives up costs and an electronic solution is yet to be found. All 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. While we have realized efficiencies thanks to electronic processes, the most time consuming manual process is the transcripts and that is yet to be automated.

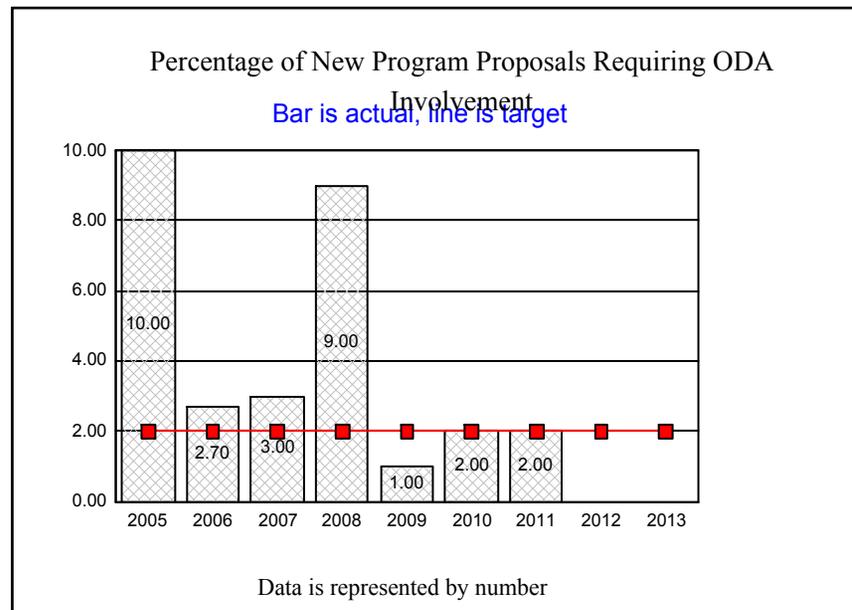
6. WHAT NEEDS TO BE DONE

Improved and increased electronic solutions continue to be a priority. Currently the agency is rewriting the electronic scholarship application resulting in a less complex and more user friendly experience. We anticipate this will increase the number of applicants-an action that is needed if we wish to increase the number of donors and hence the number of scholarships. However, to accommodate this increase, a solution needs to be found concerning the manual review of transcripts. If this review remains manual, it could cripple the agency. Process solutions are being investigated and OSAC hopes to find a solution to this vital process in the coming year.

7. ABOUT THE DATA

Data reported are based on scholarships awarded for a specific academic year. The 2010-11 academic year = 2011 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 Database	
Owner	Office of Degree Authorization (ODA), Jennifer Diallo, Interim Administrator, (541) 687-7478	



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 degree programs to review for 2011-13 is 232. In addition, there are more than 321 applications for online programs, some of which include placement programs such as student teaching and clinical practicum programs, which require review and verification with the relevant licensing boards. Each degree, external credit, and placement program is reviewed on a two-year cycle, prior to authorization. Targets reflect only known programs for which institutions will apply for approval on an ongoing basis. ODA has no control over the number, origin, and quality of unsolicited applications received in our office. Degree programs are reviewed and approved individually. Some institutions offer several programs, others only a few. A school may apply for approval of 60 degree programs and the next application from another school may be for a single degree program or placement program for an online degree.

3. HOW WE ARE DOING

Degree program approval follows an evaluation of a school's academic and administrative components to ensure that these meet Oregon standards under O.A.R. 583-030-0035. There is almost always an extensive exchange in which ODA staff plays an advisory role to the institution; recommending, in most cases, a course of action or specific actions to meet various standards. There are very few denials, due to the technical assistance inherent in this process and due to the extensive materials a school must submit, as well as the cost of the fees for the review. If a school is denied, it is because they have failed to meet Oregon standards, and not based on performance of ODA staff. It is difficult to ascertain how ODA can improve the percentage of approvals, except by continuing to provide technical assistance on an ongoing basis to substandard schools until they rise to meet the standards established in rule. Unfortunately, doing this would have a negative impact on another KPM, as it would unrealistically extend substandard program reviews beyond a desirable completion timeframe.

Our standard practice in the case of a denial is to provide the school with a report of the deficits and a timeframe for re-submission. We have no control over whether schools are able to make the necessary improvements and re-submit. In general, when a school is denied, they do not re-submit for more than a year.

4. HOW WE COMPARE

There are no other states that limit denials to 2% of applications, so there is no basis for comparison. Some states have a more intensive review process, some have less, some rely only on accreditation and do not review at all, and therefore these states do not have as much diversity or local relevance in the range of degree programs offered in that state. Most states have some type of limited review, but few states have the ideal combination of established standards and enforcement capability. Oregon is quite unique in that ODA is both provided with relevant standards and required to ensure compliance. Because of this ODA is seen as the role model in degree authorization for many other states and countries around the world.

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. We have no control over this decision, nor can we require a specific time frame for re-submission.

6. WHAT NEEDS TO BE DONE

With full staffing and a functional database, we would be in a better position to plan for future reviews and provide technical assistance prior to the submission of an application. We have also instituted a preliminary approval request form, to allow us to identify and counsel schools that are not currently ready to enter the ODA evaluation process. This new step in the approval process allows early identification of schools that may not meet our standards, and allows ODA staff to work with these schools in advance of a review. We hope that it will also serve as a self-evaluation for substandard schools to see the utility of opting out before submitting an application.

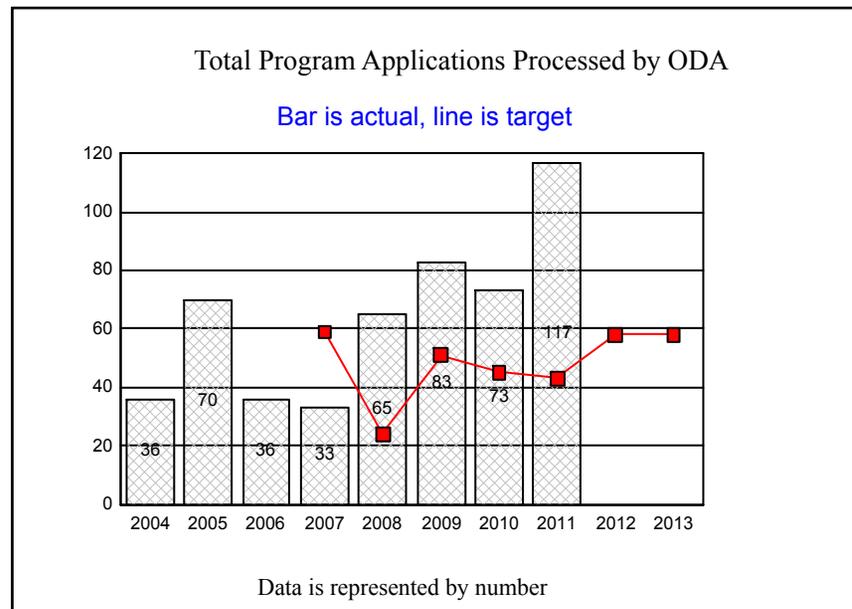
As long as applicant schools are responsible and prepared, ODA anticipates no likelihood of long-term problems or issues with meeting this performance measure.

In addition, ODA is working on developing a new web portal application process and database that will also serve as a gatekeeper to determine whether a school is ready to submit a program for approval. This application will eliminate some of the redundancy in the current re-application process, and will transfer responsibility for some of the records maintenance to the school's administrative staff, while providing ODA staff with more reliable and current information on an ongoing basis, as well as at the time of review.

7. ABOUT THE DATA

Most data used in program applications is submitted on a 2-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 Database	
Owner	Office of Degree Authorization (ODA), Jennifer Diallo, Interim Administrator, (541) 687-7478	



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 232 degree programs at Oregon campuses during the 2011-13 biennium, and currently has more than 321 applications for approval of a school to offer online programs to Oregon students. While the online programs are not currently individually reviewed, many of the online programs submitted this year include program components that are not exempt from ODA oversight. Programs involving placements for student teaching and clinical practicum experiences, for example, do require review and approval. Existing programs are reviewed every two years, while new programs are reviewed as received. Normally, new programs are given higher priority, but this also depends on other workload considerations and, in some cases, verification with the relevant licensing boards. Targets reflect known programs for which institutions are expected to re-apply for approval on an ongoing basis. The actual number also includes a number of programs that are new to Oregon and have not previously been evaluated by ODA. This number will undoubtedly increase as we have no way to predict how many new schools may open in Oregon or new programs may be proposed at existing campuses. By the same token, we cannot predict program and school closures, which may reduce this number. Degree programs are reviewed individually; some institutions offer a large number and range of programs, and others offer only one or a few degree programs.

3. HOW WE ARE DOING

ODA does not control the number of new applications, so whether we are able to meet a "goal" of a specific number of program reviews is entirely up to the number received in our office.

Overall, total applications were slightly higher in 2009, increasing in 2010 and expected to increase significantly in 2011-12. It is unclear what the goal is intended to be or how we would meet a goal based on a specific number of reviews, when this number is not something we can control. The recent experience of receiving unexpected applications from more than 320 schools in early 2011 makes this eminently obvious.

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

Inability to predict the number of program approval applications we may receive can have serious implications with respect to workload and staffing considerations. We have recently experienced an exponential increase in workload due to the introduction of new federal regulations. The impact of the regulations did have a direct and significant impact on our workflow. The situation was caused by the fact that the new regulations required schools to comply with state laws and rules and to show evidence of this compliance. In most states, this necessitated developing a process to comply with the new requirements. In Oregon, we already had a process, so the impact of the new regulation was that more than 320 schools offering online programs showed up to ask for approval thereby announcing their non-compliance. Because they were already out of compliance and had students placed in worksites all over Oregon, we were compelled to respond to the situation at once, to ensure the protection of students in Oregon vis-à-vis these unapproved programs. Unfortunately, even though the unanticipated increase in our workload was accompanied by an unanticipated increase in fee revenues from these additional applications, we were not approved to hire additional staff to accomplish the additional work. We continue to make progress, but have been unable to keep up with reviews of existing programs in a timely manner due to continuing staffing shortages, turnover, and limited availability of contract evaluators.

Over the past few years, we have noted a trend of schools submitting fewer programs for approval, but with more concentrations. While the cost for review would be less, the time to review remains the same, as the complexity and comparison of several different concentrations can require as much work as reviewing separate degree programs. In response

to this trend, ODA has implemented a preliminary application form to allow a better assessment of the scope of the programs to be reviewed and the appropriate review fees before review is entered into our system. ODA works closely with applicants to process applications in a reasonable amount of time.

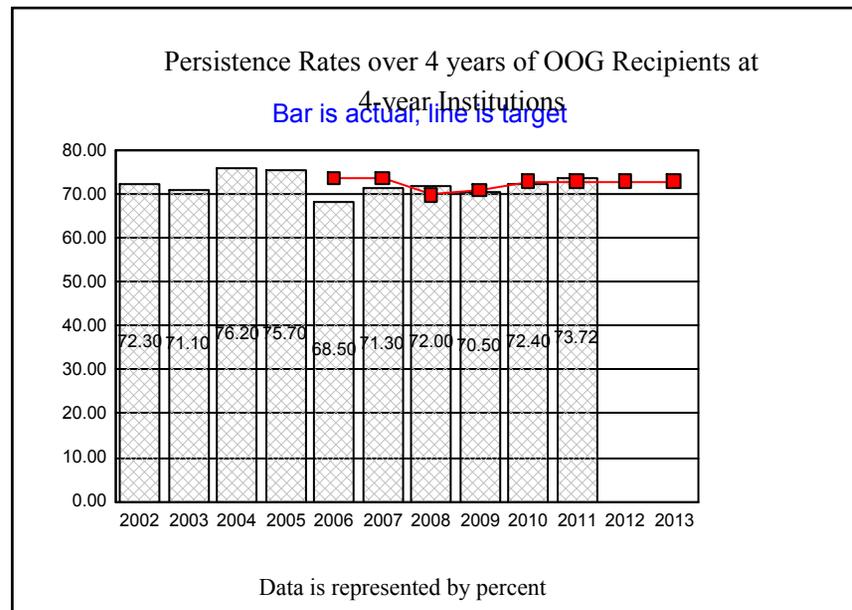
6. WHAT NEEDS TO BE DONE

We continue to work with schools to encourage and assist in the development of new programs and to improve existing programs. We believe that this assistance ensures more program stability.

7. ABOUT THE DATA

Most data used in program applications is collected every two years and stored in electronic files and database records.

KPM #8	Persistence rates over 4 years for students at 4-year institutions who are eligible and awarded an OOG.	2007
Goal	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

Persistence rates over 4 years for students at 4-year institutions who are eligible and awarded an OOG.

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." OSAC began utilizing this KPM in 2005, but initial rate calculations were not

accurate and therefore are not included.

The 2011 performance data looks at 4-year persistence rates for first-year students who started in 2007-08 and filed a Free Application for Federal Student Aid (FAFSA) and received an Oregon Opportunity Grant (OOG) in 2007-08. The performance is then measured on the percent of students who received the OOG for each of the remaining three years through 2010-11. Only students attending a 4-year institution were included. At the same time students who completed a FAFSA starting in 2007-08 but did not receive an OOG for any of 4 years were studied for their persistence in order to have a comparison.

The 2011 number indicates that 73.72% of the first time OOG recipients in 2007-08 have continued in school and received an OOG all 4 years.

2. ABOUT THE TARGETS

The goal is to achieve a 73% persistence rate or higher.

3. HOW WE ARE DOING

The 2007-08 cohort met the goal of 73%. The persistence rate of OOG recipients (73.72%) is significantly higher than those of non-recipients (35.8%). While this initially suggests that receiving the OOG improves persistence towards a degree, less was known about the control group and cannot be directly compared. Moreover, persistence rates of grant recipients equal the overall retention rates for 4-year postsecondary institutions in Oregon (see below) which is 74%. The analysis is inconclusive on the hypothesis that OOG affects persistence to a degree.

In 2008-09 the state implemented the Shared Responsibility Model and significantly increased the OOG funding. It is too early to determine the impact of these initiatives on persistence rates.

4. HOW WE COMPARE

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 most recent available retention rates for Oregon 4-year institutions is 74% after two years. Persistence rates of 73.72% 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

To detect trends, the assumptions used in administering the OOG must remain the same. Each year the parameters of the program change and assumptions are not consistent.

External factors such as tuition increases, availability of other forms of aid (especially Pell Grants) and changes in Oregon's economy among other things may affect students' decisions about going to college.

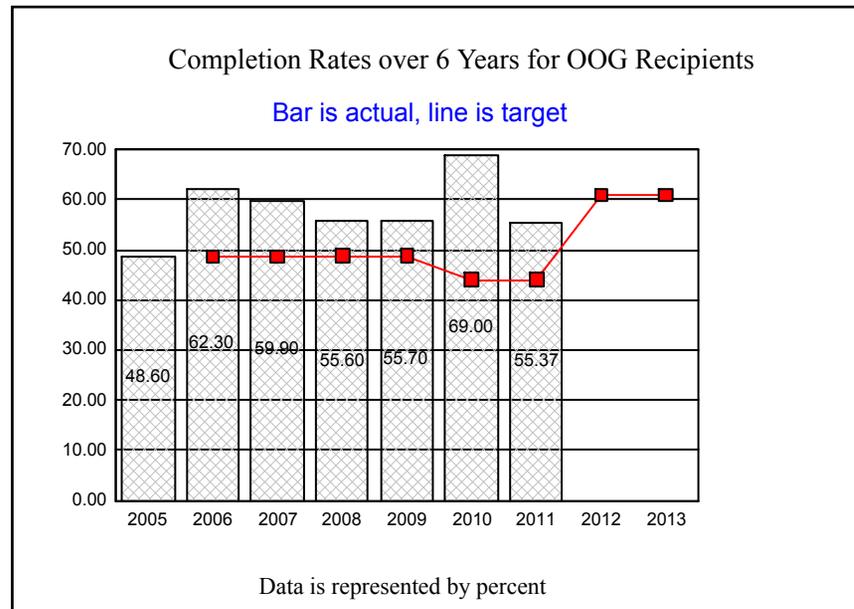
6. WHAT NEEDS TO BE DONE

During the past two years OOG applications have increased by approximately 45%. At the same time the appropriations for the OOG have declined slightly and tuition continues to climb. Oregon Opportunity Grant dollars need to be increased to absorb the impact of increased student demand and increasing tuition.

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 Oregon Opportunity Grant recipients from six years prior to determine if they completed their degree in the current year. OSAC uses an in-house database to randomly select a representative sample of approximately 500 student records from recipient and non-recipient groups for each institutional segment and obtains completion information from the National Student Clearinghouse.

This year's cohort group is first-year students from 2005-06 who completed their programs by 2010-11. The higher the completion percentage, the more grant recipients that are successfully completing their programs of study within 6 years. The flaw in this strategy is that it implies because a student received the OOG one time six years ago, that it has an impact on the student completing his/her degree. The reality is that there is little correlation.

2. ABOUT THE TARGETS

The target is based on comparable data from IPEDS which indicates 44% of four year students complete their degrees in 6 years.

3. HOW WE ARE DOING

In comparison to IPED data, Oregon is performing better than national data. It is possible the increase in the graduation rate for the 2010 cohort year can be attributed to the availability of a fully-funded Opportunity Grant program during the first three years of attendance (2005-06 through 2007-08). Future rates may be affected by the decreases in appropriation and increases in demand due Oregon's poor economic conditions.

4. HOW WE COMPARE

For 4-year institutions, IPEDS defines the 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). The same average was reported for the 2005-06 cohort (graduated by 2010-11).

5. FACTORS AFFECTING RESULTS

This KPM does not 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, changes in federal and institutional aid of various types, changes in Opportunity Grant eligibility criteria and award amounts, ease or difficulty of credit transfer, and so on. The OOG is just one element of many in providing access to higher education. The primary factor that can affect this performance is to have significant dollars available to each student consistently over the 4-6 years of college attendance.

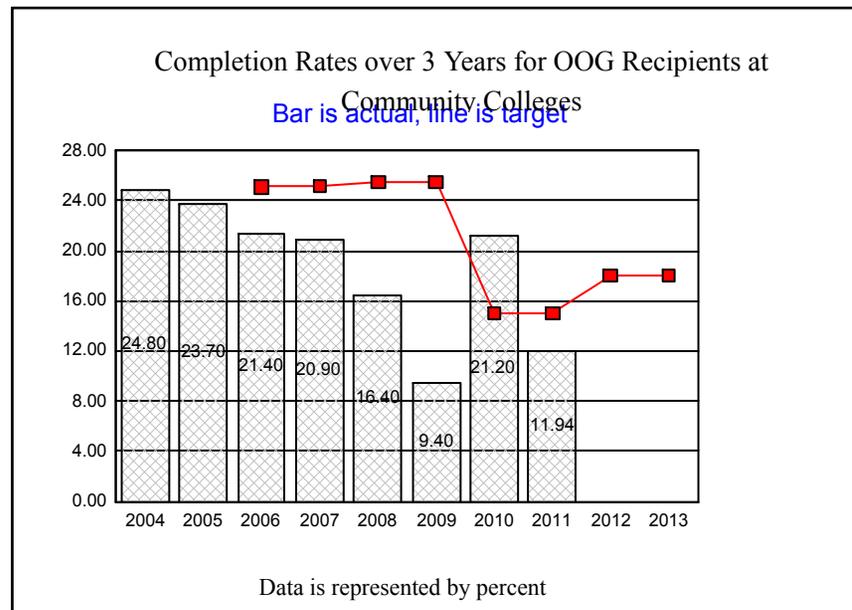
6. WHAT NEEDS TO BE DONE

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). Research suggests 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 low-income students. In theory, increasing award amounts would help more grant recipients complete their programs on time.

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

For each academic year, OSAC identifies a cohort group of first-year, first-time Oregon Opportunity Grant recipients from three years prior to determine if they completed their degree in the current year. OSAC uses an in-house database to randomly select a representative sample of approximately 500 student records from recipient and non-recipient groups for each institutional segment and obtains completion information from the National Student Clearinghouse.

The most recent OOG cohort group for whom data are available is first-year students from 2008-09 who completed their programs by 2010-11. The higher the completion percentage, the more grant recipients that are successfully completing their programs of study within 3 years. The flaw in this strategy is that it implies because a student received the OOG one time three years ago, that it has an impact on the student's completing their degree. The reality is that there is little correlation.

2. ABOUT THE TARGETS

The target is based on comparable data from IPEDS which indicates 14% of four year students complete their degrees in 3 years.

3. HOW WE ARE DOING

It is possible the decrease in the graduation rate for this cohort year may be attributed to increased enrollment, reinstatement of application due dates, and cuts in the amount of the OOG available during all three years covered by this cohort. Future rates may continue to be affected by the decreases in appropriation and increases in demand due Oregon's poor economic conditions.

4. HOW WE COMPARE

A comparison of completion rates for Opportunity Grant recipients with average 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 2010-11, the completion rate of Opportunity Grant recipients is 2.06% lower than the average of completion rates reported to IPEDS (14% for 2-year institutions). However, the data gathered from IPEDS are only available through the end of the 2009-10 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, students in 2-year Associate Degree programs and students who transfer to 4-year programs. Some students who transfer to 4-year programs do not apply for graduation after 2 years at a community college even though the student has completed the appropriate classes to do so. Only after the student earns a certificate or degree does information about the student's chosen program of study become available. This KPM does not show the direct effect of the Opportunity Grant on completion rates of 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 eligibility criteria and award amounts, ease or difficulty of credit transfer, and so on. The Opportunity Grant is just one element of many in providing access to community colleges. The primary factor that can affect this performance is to have significant dollars available to each student consistently over the 4-6 years of college attendance.

6. WHAT NEEDS TO BE DONE

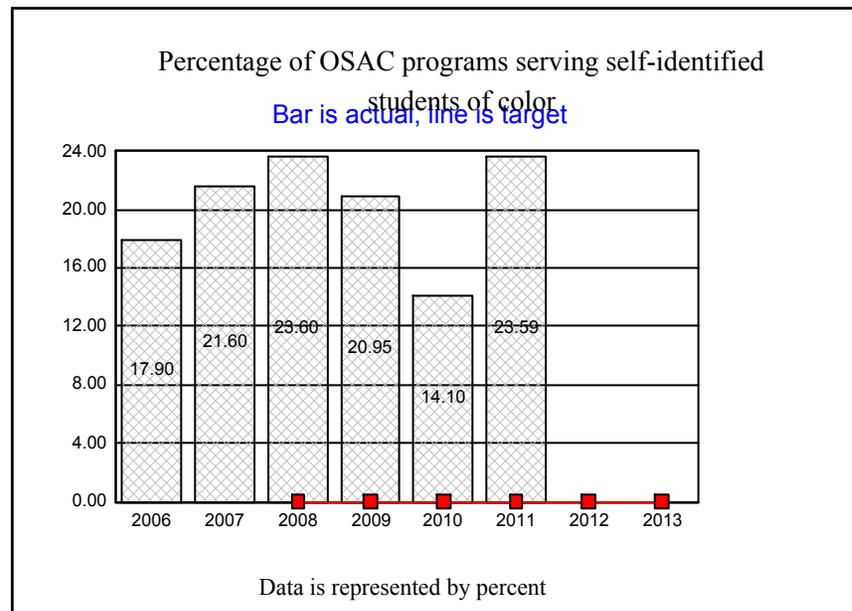
Until 2008-09, the Opportunity Grant was equal to approximately 11% of a student's average cost of attendance for the previous academic year, and the award was available only to low-income students (i.e., students with annual family incomes of less than \$35,000). Research suggests that award amounts 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 low-income students. In theory, increasing award amounts would help more grant recipients complete their programs on time.

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 #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

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.

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 -- Scholarships 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 R/E data about their students to the Integrated Postsecondary Education Data System (IPEDS). A student's race/ethnicity is a self-reported, optional data element collected during matriculation. For Oregon Opportunity Grants, OSAC conducts data-matches to collect R/E data from the Oregon University System (OUS) and the Department of Community Colleges and Workforce Development (CCWD), as reporting schedules permit after the end of the academic year in July/August. For Scholarships (SchSrv), OSAC collects R/E data from the OSAC Scholarship Application for this KPM.

2. ABOUT THE TARGETS

Percentages of recipients in each major R/E group are collected separately for the Oregon Opportunity Grant and for Scholarships. At the suggestion of the Interim Ways and Means Committee, OSAC compared results with the overall state census data. The most recent R/E data for Oregon comes from the 2010 Census: 83.6% white, 1.8% African-American, 11.7% Hispanic/Latino, 1.4% Native American/Alaskan Native, and 4.0% Asian/Pacific Islander. This totals 18.9% minority population in Oregon.

3. HOW WE ARE DOING

Effective 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. Students can opt out of providing R/E information, but schools cannot include "decline" as a reporting option. To collect R/E data, schools must use a two-question format. The first question is whether the respondent is Hispanic, any race. For non-Hispanics only, the second question is 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, or Two or more races. Because of these changes, OSAC cannot compare data from 2010 with data from previous years.

4. HOW WE COMPARE

Recent changes by the U.S. Census to R/E categories make it impossible to compare data with prior years; 2010 data will establish a new benchmark going forward. For the 2010-11 academic year, the total percentage of grant and scholarship awardees who reported themselves within the African-American, Hispanic/Latino, Native America/Alaskan Native and Asian/Pacific Islander R/E categories increased to 23.59% of all recipients. This percentage compares favorably to the 18.9% who identify themselves as a minority in the state of Oregon.

5. FACTORS AFFECTING RESULTS

The ASPIRE program increased from 82 high schools in 2006-07 to more than 125 sites in 2010-11, reaching more students with information and individual mentoring. Because all institutions that report to the federal IPEDS system must revise the way they collect and report students' race and ethnicity by 2010-11, OSAC will be unable to make year-to-year comparisons of R/E data for several years. During the 2009-10 academic year, 33.91% of total applicants served chose not to respond, or answered "other"

or “unknown” to the race/ethnicity question. For 2010-11, the number of total applicants who chose not to respond decreased significantly (to less than 1%) and those who answered other or unknown decreased to only 6% of total responders. This may explain why the total percentage of minority students increased for 2010-11 (more students chose to report and picked a category other than “two or more races” or “unknown.”)

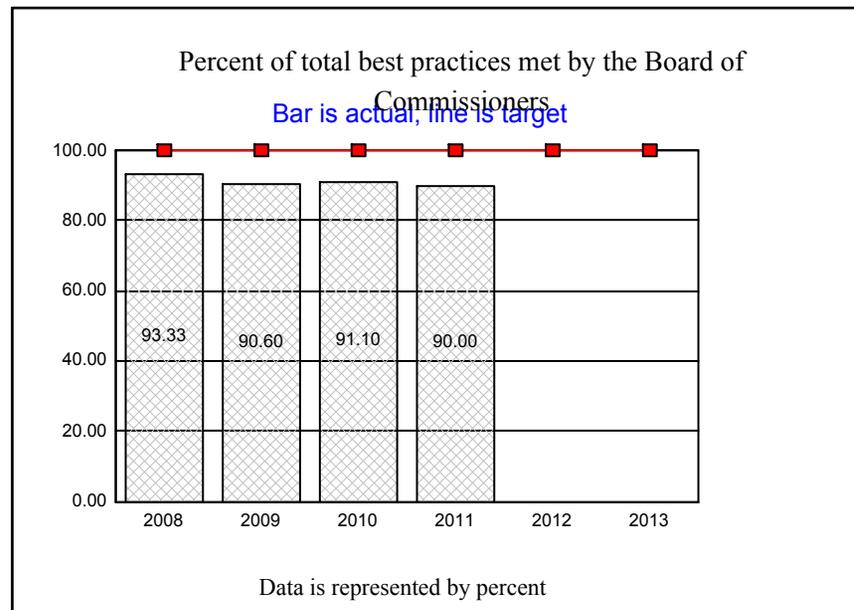
6. WHAT NEEDS TO BE DONE

OSAC is currently developing a marketing plan with the express goal to make OSAC and our products a household word. Utilizing technology to communicate the value of OSAC is vital in a world when the traditional college students only use electronic means to obtain information. OSAC is very aware of underrepresented populations and will continue to drive communication to these segments.

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, Executive Director, Josette Green, (541) 687-7377	



1. OUR STRATEGY

A 2005 budget note required the Department of Administrative Services to work with the Legislative Fiscal Office to develop best management practices performance measures with respect to governance oversight for applicable boards and commissions. A list of the measures and a list of approximately 44 entities to which these measures would apply were approved by the Joint Legislative Audit Committee in August 2006. In addition to OSAC, the following education-related entities that are required to report on the Best Practices

KPM include Community Colleges and Workforce Development, State Board of Higher Education, and Teacher Standards and Practices Commission. This performance measure is now in its fourth year.

Annually, each Commissioner is asked to assess the seven person commission on the 15 identified best practices. The commissioners were given the annual survey in June 2011. Six of the seven Commissioners completed the survey and one chose to not answer all questions.

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

During the four-year span, the percentage of best practices met has been in a consistent range of 90% to 93.33%. While we are short of the 100% target, we have consistently been close.

2008: 93.33%; 2009: 90.60%; 2010: 91.10%; 2011 90.0%

4. HOW WE COMPARE

Comparison may be possible in the future with other education-related state agencies and agencies of comparable size. Currently, CCWD is the only "education-related" entity that reports on best practices, and the scope of its responsibilities differs from OSAC's. A glance at the APPR of various boards and commissions that are required to report the Best Practices KPM shows both higher and lower percentage reports.

5. FACTORS AFFECTING RESULTS

Unfamiliarity with some of the best practice questions caused a commissioner to refrain from answering particular questions, resulting in a score under 100%. The lack of understanding of the 15 practices could have an impact on the score in total.

6. WHAT NEEDS TO BE DONE

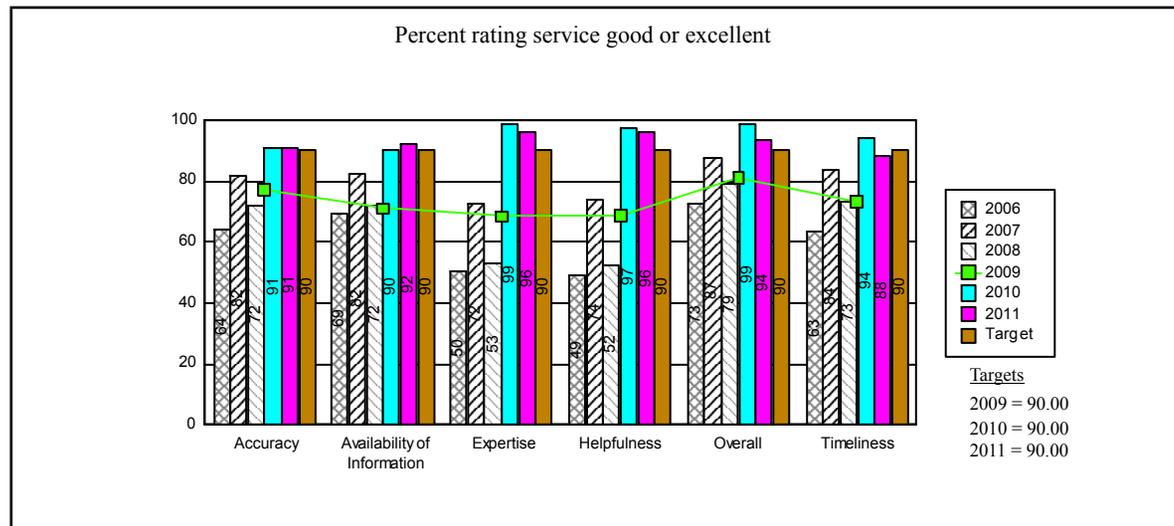
Incorporation of the best practices affecting KPMs should be incorporated into the Commission meeting process. A review of the best practices at the beginning of each year could benefit in stronger performance by the commissioners and a better understanding of the survey at the end of the year.

OSAC needs to reconsider the target of 100% since a score of perfection is subject to the whim of each commissioner. A score that can offer flexibility to differing interpretations and understanding of the best practices will support high performance and at the same time allow for differences.

7. ABOUT THE DATA

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

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, Executive Director, Josette Green, (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. OSAC replaced previous KPMs with this measure to comply with the specified format.

OSAC uses Survey Monkey to collect the information from Financial Aid Officers, ASPIRE Site Coordinators and Scholarship Selection Committee Members. Access to the survey was provided through an e-mail, communication on a listserv, or a website link provided with materials pertinent to the particular user group. For the 2011 KPM, 38 Financial Aid Officers, 95 ASPIRE Site Coordinators, and 126 Scholarship Selection Committee Members (a total of 259) completed the survey.

2. ABOUT THE TARGETS

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

3. HOW WE ARE DOING

On average, 93.55% of OSAC's client and constituent groups rated their overall customer satisfaction experience as "Good" or "Excellent" for 2011.

4. HOW WE COMPARE

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

5. FACTORS AFFECTING RESULTS

A consistent methodology was employed for the 2010 and 2011 KPM years which makes the data more consistent year to year and therefore can be more accurately compared going forward.

Overall Service 2006: 84.5%; 2007: 91.0%; 2008: 90.9%; 2009: 89.8%; 2010: 98.7%; 2011: 93.55%

Timeliness 2006: 78.3%; 2007: 90.8%; 2008: 86.2%; 2009: 80.3%; 2010: 94.4%; 2011: 87.95%

Accuracy 2006: 80.5%; 2007: 89.8%; 2008: 90.4%; 2009: 86.9%; 2010: 90.9%; 2011: 91.13%

Helpfulness 2006: 86.0%; 2007: 87.8%; 2008: 90.9%; 2009: 89.4%; 2010: 97.4%; 2011: 96.20%

Expertise 2006: 88.3%; 2007: 87.6%; 2008: 92.7%; 2009: 89.6%; 2010: 98.7%; 2011: 96.09%

Availability of Information 2006: 81.5%; 2007: 86.1%; 2008: 85.8%; 2009: 80.3%; 2010: 90.0%; 2011: 92.28%

Three types of user groups were surveyed and for these groups, "don't know" responses ranged from 2% to 6%. 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.

The total number of responders to the customer service survey actually increased by 62%. The increased number of survey respondents may be due to increased use of technology among customers. Increased use of electronic technology may also affect an increase in the "Availability of Information" rating, which reached an all-time high of 92.28% for 2011.

The decrease in the "overall quality of service" rating is due to a variety of factors. Budget cuts and enrollment increases required OSAC to give short notice that it would implement program reductions and early cut-off dates for the Oregon Opportunity Grant.

The four categories in which OSAC scored lower responses were "Overall Service," "Timeliness," "Helpfulness," and "Expertise.". Given that OSAC achieved a significantly higher participation rate than the prior year, these rates may be a more accurate reflection of the past two years. Survey data shows the positive effects of OSAC's efforts to increase information and utilize technology. OSAC has continued to upgrade and enhance its electronic capabilities and the outcome is noticeable to our customers.

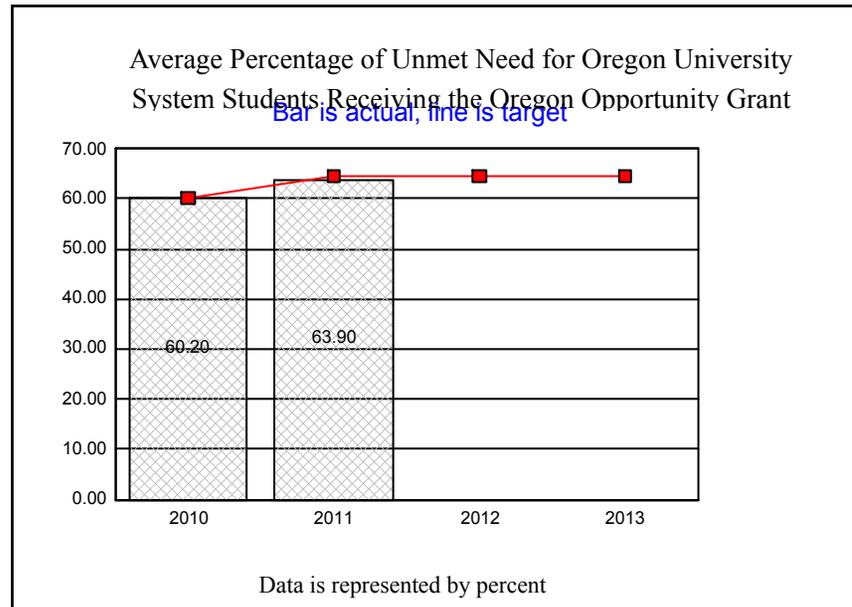
6. WHAT NEEDS TO BE DONE

OSAC needs to maintain a consistent format and delivery going forward so the data can be accurately compared from year to year. OSAC will also be examining the timing of the survey and the method it is delivered to ensure the response reflects the customers overall response to OSAC and not one that reflects only the situation in which they were currently engaged. In other words, the survey should not be attached to a particular activity but independent. It currently is not independent.

7. ABOUT THE DATA

Surveys were based on the 2010-11 school year cycle (September - June). The following groups were surveyed: scholarship selection committees (clients), students who completed OSAC's online scholarship applications; ASPIRE site supervisors (constituents); and financial aid officers (constituents). For students completing the online scholarship application, the customer service survey was available while the student was 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. OSAC customer service statistics are 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 are averaged to generate an agency-wide statistic. Customer groups that indicate limited knowledge of OSAC's programs and services (based on the percent of "don't know, none or a bit" responses) are surveyed but responses are 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 summary 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 OSAC to create a measure to track the impact of the adoption of the Shared Responsibility Model (SRM), the formula for calculating Oregon

Opportunity Grant (OOG) award amounts starting in 2008-09. 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).

This 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). This is the second year of reporting for this KPM.

2. ABOUT THE TARGETS

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. 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 located.

3. HOW WE ARE DOING

The OOG was expected to greatly reduce the amount of unmet need in 2008 with the implementation of the Shared Responsibility Model (SRM) and increased state support. In 2009-10, the average cost of attendance at Oregon's public four-year universities increased by 1.3% while the average Oregon Opportunity Grant (OOG) decreased by more than 23%. The decrease in the OOG was a necessary action taken to provide grant funds to as many students as possible in an academic year when the number of eligible applicants increased substantially. The maximum OOG for four-year public institutions was \$1950 per student for 2010-11, and will remain the same for the 2011-12 academic year.

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%

2010-11- OUS 63.9%; Community Colleges 51.9%

4. HOW WE COMPARE

OSAC initiated a survey in September 2011 to find out if any other states have a comparable performance measure. Oregon is still the only state that measures program performance by this means.

5. FACTORS AFFECTING RESULTS

OSAC has no direct control over program funding, college enrollment, the number of qualified applicants, or the rising cost of tuition. Additionally, the Federal Pell Grant program is dependent upon Congress for funding levels and award maximums. The bottom line is that OSAC cannot affect performance on this goal-only the legislature has this ability by the dollars appropriated.

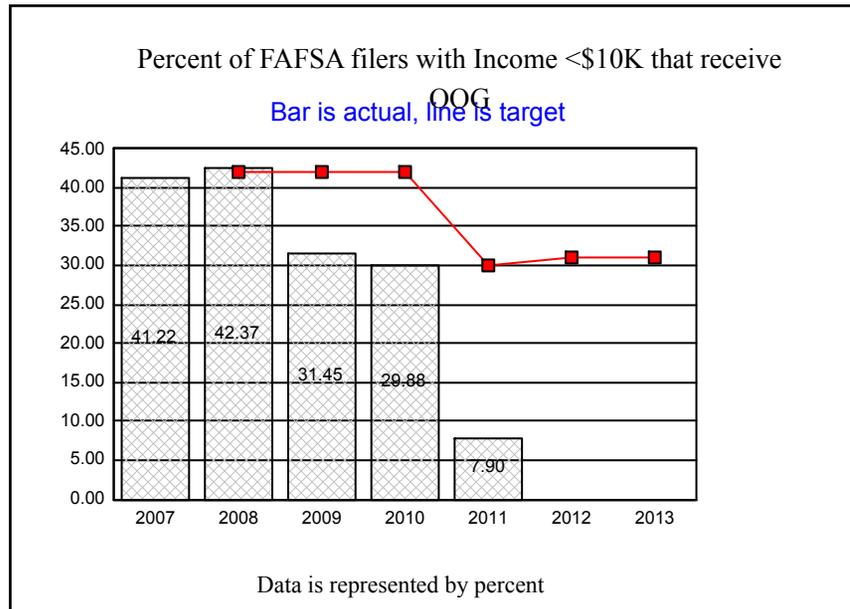
6. WHAT NEEDS TO BE DONE

An increased OOG appropriation that keeps pace with the increasing applications and increasing tuition is what needs to be done to improve this performance. Another option is to increase the individual award amount which would reduce the number of students receiving the OOG but allow the individual student award to keep pace with the remaining need.

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

This KPM stratifies the incomes of the Oregon Opportunity Grant (OOG) recipients into seven income ranges from \$0 to approximately the median family income for Oregon (\$71,541 for a family of four in 2011, U.S. Census Bureau) and compares it to the total number of FAFSA filers by income range. Tracking grant assistance by income measures the program's impact on various income strata. The implementation of the Shared Responsibility Model in 2008 had the intention of impacting middle income families and this KPM measures the effectiveness of the OOG to achieve this goal.

2. ABOUT THE TARGETS

The target for 2011 of 30% is the goal set for the percentage of FAFSA filers in the \$0 - \$9,999 income.

3. HOW WE ARE DOING

For the 2010-11 academic year, the number of financial aid applicants who received the OOG decreased significantly due to a decrease in funding and an increase in FAFSA filers. As a consequence the percent of OOG applicants by income range declined when compared to the total population of the FAFSA filers.

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%; 2011-7.90%
\$10,000-\$19,999: 2005 - 21.75%; 2006 - 27.47%; 2007 - 33.06%; 2008 - 32.19%; 2009 - 37.11%; 2010 - 36.80%; 2011-7.92%
\$20,000-\$29,999: 2005 - 17.73%; 2006 - 22.46%; 2007 - 26.63%; 2008 - 26.31%; 2009 - 29.53%; 2010 - 28.88%; 2011-7.34%
\$30,000-\$39,000: 2005 - 10.37%; 2006 - 11.75%; 2007 - 13.82%; 2008 - 13.77%; 2009 - 32.47%; 2010 - 22.31%; 2011-7.13%
\$40,000-\$49,000: 2005 - 1.46%; 2006 - 2.62%; 2007 - 3.65%; 2008 - 4.01%; 2009 - 29.54%; 2010 - 13.70%; 2011-5.25%
\$50,000-\$59,999: 2005 - 0.00%; 2006 - 0.00%; 2007 - 0.20%; 2008 - 0.38%; 2009 - 21.22%; 2010 - 2.27%; 2011-.64%
\$60,000-\$69,000: 2005 - 0.00%; 2006 - 0.02%; 2007 - 0.07%; 2008 - 0.27%; 2009 - 10.36%; 2010 - 1.43%; 2011-.28%
\$70,000 or greater: 2005 - 0.01%; 2006 - 0.02%; 2007 - 0.06%; 2008 - 0.06%; 2009 - .49%; 2010 - .38%; 2011-.03%

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

The success of this KPM is totally reliant on the dollars allocated for the OOG and the number of FAFSA filers. More dollars without an increase in the number of applicants will improve performance.

Before 2008-09, Opportunity Grants were available only to students with family incomes below 55% of the median family income for a family of four in Oregon. This changed with the implementation of the Shared Responsibility Model in 2008-09 and the maximum eligible income was raised to \$70,000. 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 in a decrease of awarded applicants. Due to increased demand for limited funds it is inappropriate to compare the data from year to year.

6. WHAT NEEDS TO BE DONE

To improve performance, significant dollars need to be appropriated to the Oregon Opportunity Grant.

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

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

Alternate: Susan Degen

Alternate Phone: 541-687-7451

The following questions indicate how performance measures and data are used for management and accountability purposes.

1. INCLUSIVITY

* **Staff:** OSAC's performance measures relating to operational goals were developed with managers, program administrators, and other key staff.

* **Elected Officials:** Our elected officials determine the KPM's. 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). 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.
The results of the annual KPM's are presented to the legislature during the Budget Presentation to the Ways and Means Education Sub-Committee.

* **Stakeholders:** OSAC collects data for KPMs related to the Oregon 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. Stakeholders are notified of each Commission Meeting and can attend the presentation on the annual KPM report in addition to finding it on OSAC's website.

* **Citizens:** The KPM outcomes are reported annually at the OSAC Commission meeting. This is a publically announced meeting and can be attended by any citizen. Every citizen has the opportunity to contribute to the KPMs.

2 MANAGING FOR RESULTS

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

	<p>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>3 STAFF TRAINING</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>4 COMMUNICATING RESULTS</p>	<p>* Staff : Key staff members participate in data collection and analysis during the development process for KPMs related to their programs. All staff has access to final versions of KPM documents, which are posted on the agency website.</p> <p>* Elected Officials: The Executive Director provides the agency's KPMs in a presentation to the Ways and Means Education Subcommittees each legislative session. The last report to the legislature was in March 2011.</p> <p>* Stakeholders: KPMs are posted on the agency website: http://www.osac.state.or.us/performance.html. In addition Stakeholders and Citizens can attend the KPM presentation each year to the OSAC Commissioners.</p> <p>* Citizens: Annual Performance Progress Reports are posted on the agency website: http://www.osac.state.or.us/performance.html</p>