

STUDENT ACCESS COMMISSION, OREGON

Annual Performance Progress Report (APPR) for Fiscal Year (2011-2012)

Original Submission Date: 2012

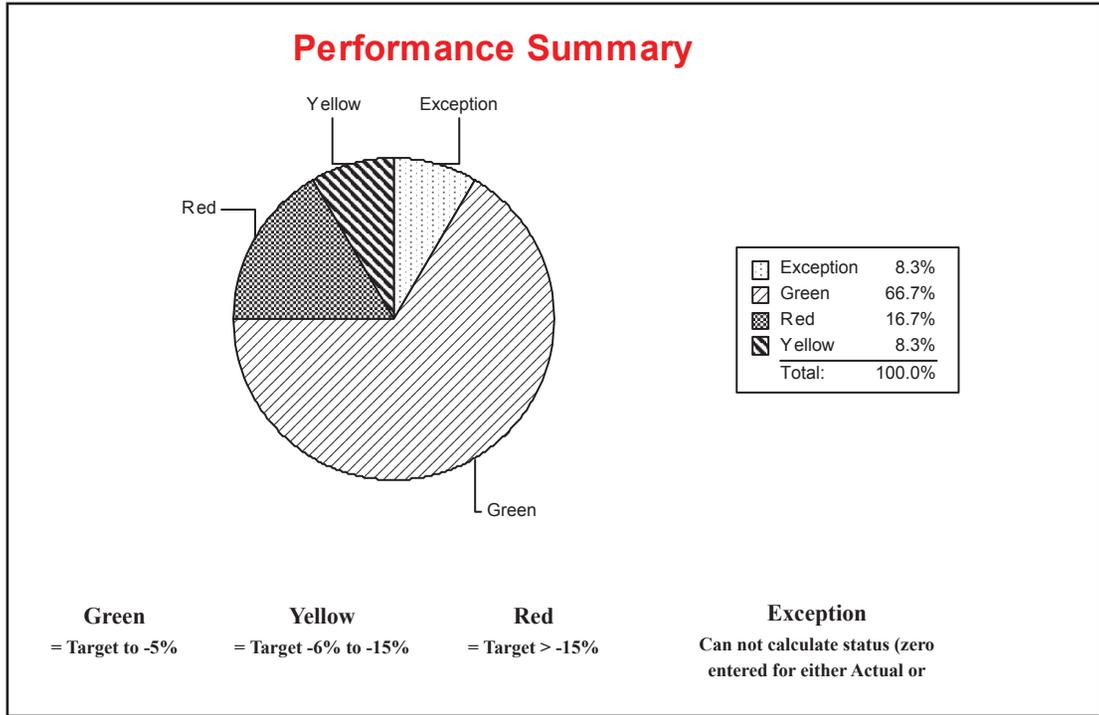
Finalize Date: 1/16/2013

2011-2012 KPM #	2011-2012 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 2013-2015
NEW	<p>Title: Determine the college-going culture of Oregon Opportunity Grant awardees by measuring the percentage of OOG awardees who enroll in college and utilize OOG funds.</p> <p>Rationale: OSAC's mission is to create a college-going culture. It is important to measure our programs accordingly.</p>
NEW	<p>Title: Determine the college-going culture of ASPIRE students by measuring the percentage of graduating senior ASPIRE participants who enroll in college.</p> <p>Rationale: OSAC's mission is college-going culture. It is important to measure our programs accordingly.</p>
NEW	<p>Title: Percentage of OOG awardees whose first college choice on the FAFSA was an out-of-state school but who attend an Oregon school and utilize OOG funds.</p> <p>Rationale: OSAC's mission is college-going culture. It is important to measure our programs accordingly.</p>
NEW	<p>Title: Effective and timely communications with OOG awardees.</p> <p>Rationale: OSAC wants to make sure students are notified timely of their eligibility for an OOG by measuring the number of days that pass between the date awards are made and the date electronic messages go out to students.</p>
NEW	<p>Title: Determining the college-going culture of Foster Youth awarded OOG by measuring the percentage of foster youth who are awarded priority OOG and who enroll in college and utilize OOG funds.</p> <p>Rationale: OSAC's mission is college-going culture. It is important to measure our programs accordingly.</p>
DELETE	<p>Title: Time to complete a degree program review.</p> <p>Rationale: This KPM is for the Office of Degree Authorization, which moved to the Higher Education Coordinating Commission on July 1, 2012.</p>
DELETE	<p>Title: Percentage of new program proposals requiring ODA involvement – New program application denial rate.</p> <p>Rationale: This KPM is for the Office of Degree Authorization, which moved to the Higher Education Coordinating Commission on July 1, 2012.</p>

New Delete	Proposed Key Performance Measures (KPM's) for Biennium 2013-2015
DELETE	<p>Title: Total program applications processed by ODA.</p> <p>Rationale: This KPM is for the Office of Degree Authorization, which moved to the Higher Education Coordinating Commission on July 1, 2012.</p>
DELETE	<p>Title: Persistence rates over 4 years for students at 4-year institutions who are eligible and awarded an OOG.</p> <p>Rationale: OSAC has no control over outcomes for this KPM.</p>
DELETE	<p>Title: Completion rates (graduated within 6 years) for students at 4-year institutions who are eligible and awarded an OOG.</p> <p>Rationale: OSAC has no control over outcomes for this KPM.</p>
DELETE	<p>Title: Completion rates (graduated within 3 years) for students at community colleges who are eligible and awarded an OOG.</p> <p>Rationale: OSAC has no control over outcomes for this KPM.</p>
DELETE	<p>Title: Remaining financial need after known grant assistance</p> <p>Rationale: OSAC has no control over program demand or program funding.</p>
DELETE	<p>Title: Impact of Opportunity Grants on enrollment of eligible students.</p> <p>Rationale: OSAC has no control over program demand or program funding.</p>

STUDENT ACCESS COMMISSION, OREGON		I. EXECUTIVE SUMMARY	
Agency Mission: To create a college-going culture for all Oregonians by providing access through information, mentoring, and financial support.			
Contact: Susan Degen		Contact Phone: 541-687-7451	
Alternate: Peggy Cooksey		Alternate Phone: 541-687-7443	



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 for students planning to go to college. The program was established in 1971 and has been revised and expanded many times over the years. Program funding for the 2011-13 biennium consists primarily of General Fund with a small amount of funds from a percentage of interest earned on the Lottery-supported Education Stability Fund and expired Individual Education Accounts for participants in the JOBS Plus program. Nearly 29,000 students received more

than \$43 million in Opportunity Grants for the first year of the 2011-13 biennium.

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. ODA moved to the Higher Education Coordinating Commission, effective July 1, 2012, so KPMs will only be reported only for the first year of the 2011-13 biennium.

3) Scholarship and Access Programs include more than 450 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 2010-11, more than 3,000 college and university students received over \$15 million through this array of programs.

Several agency programs and services are currently 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 educational opportunities. In 2011-12, ASPIRE worked in approximately 143 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 sessions in addition to the January statewide College Goal Oregon event.

2. THE OREGON CONTEXT

According to Oregon Employment Department's *Employment Projections by Industry & Occupation 2010-2020*, 19 percent of all job openings require some postsecondary training, and 35 percent of all competitive-level openings require a college degree. Numerous 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. As noted in the Oregon Employment Department's January 2012 report, *The Value of a Bachelor's Degree*, "The overall share of high-wage jobs is larger for occupations requiring a bachelor's degree than for occupations with an associate degree or no postsecondary education as a minimum requirement." Indeed, 82 percent of employment in Oregon's occupations requiring a bachelor's degree as a minimum requirement paid more than \$50,000 a year. There is clear evidence of higher education's return on investment, both for the individual and for the state. Yet data from OUS Institutional Research Services show a decline in OUS enrollment by recent high school graduates, decreasing from a high of 24.1% in 2001-02 to 20.0% in both 2010-11 and 2011-12.

The 2007 Legislative Assembly approved a historic overhaul of the Oregon Opportunity Grant (OOG) program, the state's major need-based grant program for postsecondary students. Working with 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. This has been especially critical over the last two biennia, as college costs have continued to outpace inflation. Since 2008-09, the first year using the Shared Responsibility methodology, OSAC has seen huge increases in demand because of the economic downturn. That demand continues unabated in the current 2011-13 biennium, but program funding levels have remained static. In response, OSAC implemented cost controls such as reducing award amounts and setting early deadlines in order to accommodate as many students as possible. On another front, OSAC is working to expand the benefits of the ASPIRE program to all sites serving high school students that want to participate.

For 2011-13, the Commission set two goals that directly relate to furthering OSAC's mission: 1) increase OOG funding to expand the number of eligible applicants who receive grant funds and increase award amounts to recognize ever-increasing college costs and 2) extend participation in the ASPIRE program to all Oregon high schools and middle schools that seek to participate. 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 26a and b. Whether it is possible to sustain programs and work toward these goals with the limited funding available in the 2011-13 biennium and beyond remains to be seen.

3. PERFORMANCE SUMMARY

For the 2013-15 biennium, OSAC has proposed adding three new KPMs and deleting eight existing KPMs, including three KPMs for the Office of Degree Authorization, which moved to the Higher Education Coordinating Commission in July 2012. Overall, a total of 12 KPMs have been added since the end of the 2005 Legislative Session, but OSAC has limited data for many newer KPMs. As such, it is too early to identify trends or to determine with any certainty the extent to which 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) For most of 2011-12, the Office of Degree Authorization had only one full-time staff member to handle the workload of a normal staff of two. This 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 thousands of students and yet have little direct interaction. OSAC staff work most directly with scholarship donors and with financial aid officials on college campuses. Direct contact with students who apply for the

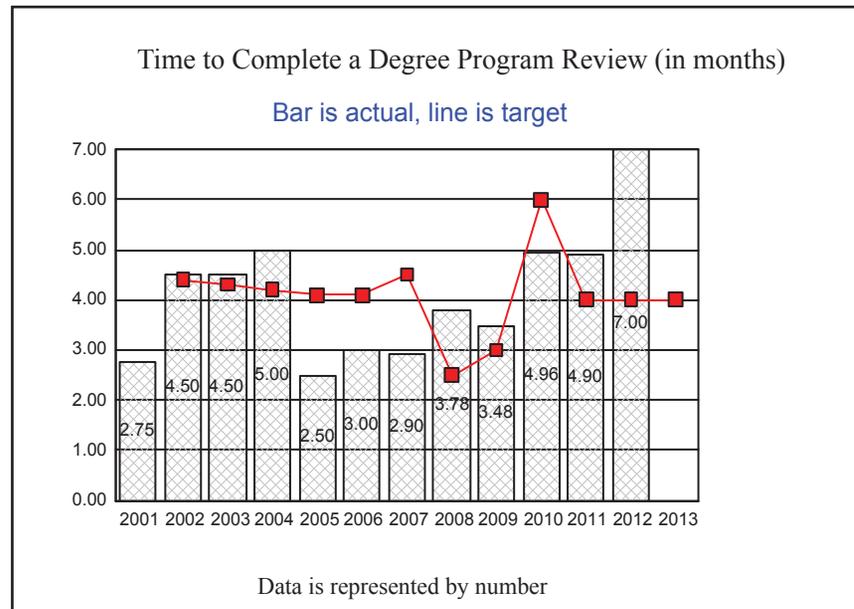
Opportunity Grant or for OSAC-administered scholarships is extremely limited. (KPM#15)

5. RESOURCES AND EFFICIENCY

Resources: 2011-13 Budget Summary: General Fund \$99,921,326; Lottery Funds \$2,630,172; Other Funds \$21,457,426; Other Funds Non-Ltd \$0; Federal Funds \$0.

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, 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), Jennifer Diallo, Director, (503) 373-0072	



1. OUR STRATEGY

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

2. ABOUT THE TARGETS

Targets are based on known arrival dates of renewal applications for existing programs and available staff resources . Achieving results below the target is good.

3. HOW WE ARE DOING

During this fiscal year (2011-2012), ODA transitioned to a new agency and location in Salem. Changes to budget processes, unexpected retirement of the ODA Director and ongoing understaffing delayed timely completion of program reviews and an increased workload due to new federal mandates exacerbated the delays. ODA's time to review for this fiscal year was 7.0 months, which is not within the target timeframe. We plan to hire additional staff to complete the backlog of reviews and meet the desired goal of less than 4 months per review. In general, ODA is insufficiently staffed for the workload and we are taking steps to alleviate this problem. These will include both increased efficiency and increased staffing. Some ability to flex with workload levels is desirable, as the timing of new program requests is out of our hands.

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. Oregon's target is 4 months, which is more ambitious and difficult to attain due to the extensive communications, site visit, response, and follow-up required within the review process.

5. FACTORS AFFECTING RESULTS

The primary variable is that when a school wants to start a completely new program, we normally give that application priority in order to allow the school to respond quickly to workforce 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, pushing the anticipated fee revenue further into the future and extending the time of approval longer than intended. The other main variables are under the school's control. These are whether the application is complete and well-prepared and whether the school has problems that are discovered during the review

and require more follow-up. Due to some persistent issues, ODA provided training for career colleges. We have seen a marked improvement in the quality and completeness of applications since the training.

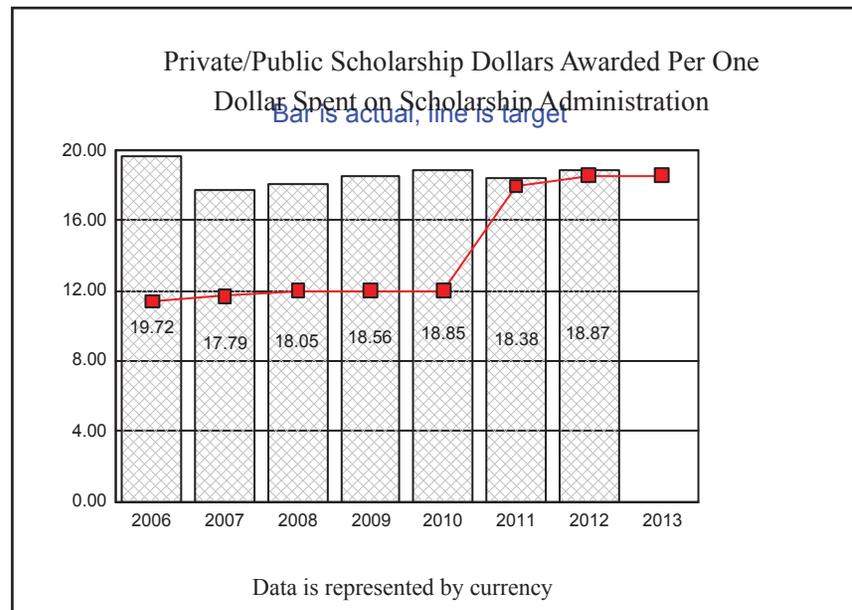
6. WHAT NEEDS TO BE DONE

The time to review is not entirely under our control and is driven largely by the increasing workload, quality of applications received, quality of new program design, and any problems or issues encountered during the review. The responsiveness of the school is another key factor. ODA can increase staffing to add one Office Specialist position to provide program support and increase efficiency. ODA can also improve our database and file management system to reduce redundant and manual processes, and create more efficiencies. Without additional staff and better data management systems, ODA cannot realistically reduce the time to review to achieve a target of 4 months. Use of contractors engenders additional layers of communication that also require staff time and can delay timely completion of reviews. In addition, use of contractors results in ODA staff having less awareness of issues or red flags to monitor at a campus.

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. Our database is not functioning correctly and is not adaptable to newer program models and processes. We are exploring the possibility of creating a new webportal plus database system to provide better data management capability.

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 goal of this KPM is to drive an increased 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. When total scholarship dollars increase relative to total dollars spent in administration, the ratio improves.

2. ABOUT THE 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 7 years of data, we now know that 18.6 is an appropriate target for this measure.

3. HOW WE ARE DOING

The ratio is 18.87 for the 2011-12 academic year. It is within the consistent range of 17.79 and 19.72 that has been reported since 2006 for this KPM and is close to the target of 18.6.

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 2011-12 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 20 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 improved. 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 application data online via a secure web portal. While we have realized efficiencies thanks to electronic processes, the most time-consuming manual process is review of transcripts, and that is yet to be automated.

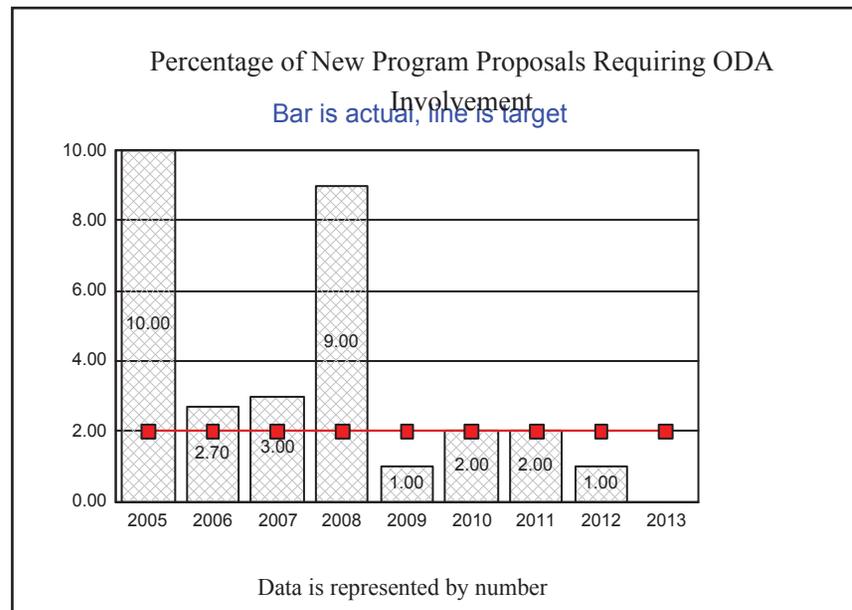
6. WHAT NEEDS TO BE DONE

Improved and increased electronic solutions continue to be a priority. The agency in the final stages of rewriting the electronic scholarship application, which will result 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 a corresponding number of scholarships. To accommodate this increase, however, a solution needs to be found concerning the manual review of transcripts in order to maintain the agency's effectiveness and timeliness in processing the total number of applications that are submitted each year.

7. ABOUT THE DATA

Data reported are based on scholarships awarded for a specific academic year. The 2011-12 academic year = 2012 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), Jennifer Diallo, Director of Degree Authorization, (503) 373-0072	



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 reviewed for 2011-12 is 312 degree and certificate programs. In addition, we received more than 600 applications for online programs, some of which include placement programs such as student teaching and clinical practicum programs. These latter require review and often verification and coordination with relevant licensing boards. Each degree, certificate, and placement program is reviewed every two years, prior to initial and renewal 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 for new programs at existing schools, new schools and their programs, and new requests for approval of online degree programs for offer to Oregon students. Degree programs are reviewed and approved individually and school operations and administration are also reviewed biennially. Some institutions offer several programs, others only a few. Workload may be unpredictable as colleges make decisions independently and renewal applications may include more or fewer programs than the previous application from the last re-authorization.

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 coaching and technical assistance provided throughout the process. If a school is denied, it is because they have failed to meet Oregon standards, and is not based on performance of ODA staff. It would be difficult for ODA to improve the percentage of approvals, except by continuing to improve the training and coaching provided on an ongoing basis to substandard schools until they rise to meet standards established in administrative rule. Unfortunately, prolonged coaching has a negative impact on another KPM, as it extends the period of time the application is under review past the target 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 degree programs offered in that state. Most states have some type of limited review, but to our knowledge, no other state appears to have the same 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 a recognized

leader in degree authorization among the U.S. states and also among 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 there are a few that do not really have the desire to do so. We have no control over this decision, nor can we require a specific timeframe for re-submission.

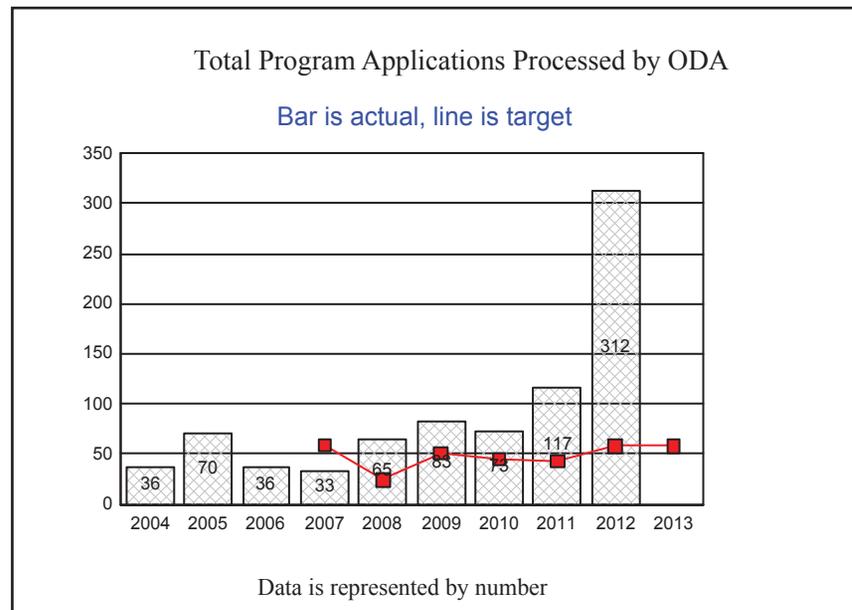
6. WHAT NEEDS TO BE DONE

With increased staffing and a fully functional data management system, ODA would be in a better position to plan for future reviews and provide more training and technical assistance beforehand and respond to performance deficits and student concerns in a more timely manner. We plan to create a guide to Oregon degree program authorization as a resource for schools and licensing boards, as well as to enhance our current public information to assist students in choosing colleges with appropriate authorization, accreditation, and licensing preparation. As long as applicant schools are responsible and their applications are well-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 tracking spreadsheet (contains all needed data)	
Owner	Office of Degree Authorization (ODA), Jennifer Diallo, Director, (503) 373-0072	



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 estimated it will review 232 degree programs at Oregon campuses during the 2011-13 biennium, and reviewed 312 programs at Oregon campuses to Oregon students. Online degree programs are not individually reviewed. More than 600 out-of-state schools submitted applications for approval to offer online degree programs to students in Oregon. Most online programs submitted include clinical or teaching placements or other practicum experiences subject to supervision and oversight. Existing programs are reviewed every two years, while new programs are reviewed on receipt. Normally, new programs are given higher priority, but this depends on other workload considerations. Targets reflect known programs for which institutions are expected to re-apply for approval on an biennial basis. The actual number also includes a number of unanticipated programs that are new to Oregon and have not previously been evaluated by ODA. 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 have any ability to control the number of new applications, so whether we are able to meet a “goal” of a specific number of program reviews is entirely out of our control. Overall, total applications were higher in 2009, increased again in 2010 and increased significantly in 2011-12. It is unclear how we can meet a specific goal, when the number of applications we receive 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

There is no comparison data available for a targeted number of program reviews, as other states would not measure the number of applications received to assess performance of a counterpart agency.

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. In 2011, we experienced an exponential increase in workload due to the introduction of new federal

regulations. The impact of these regulations did have a direct and significant impact on our workflow. The new regulations required schools to comply with state laws and rules and to show evidence of this compliance for federal financial aid eligibility. 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 only in terms of increased communications and increased number of applications to process from schools now offering online degree and certificate programs. The workload issues were exacerbated by the high volume of cases where licensure preparation was not directly linked to the ODA approval process. ODA staff were compelled to respond to the urgent approvals needed by students whose schools had not prepared for their placements related to professional licensure in advance. 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 full-time permanent staff to accomplish the 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 effectiveness of contract evaluators.

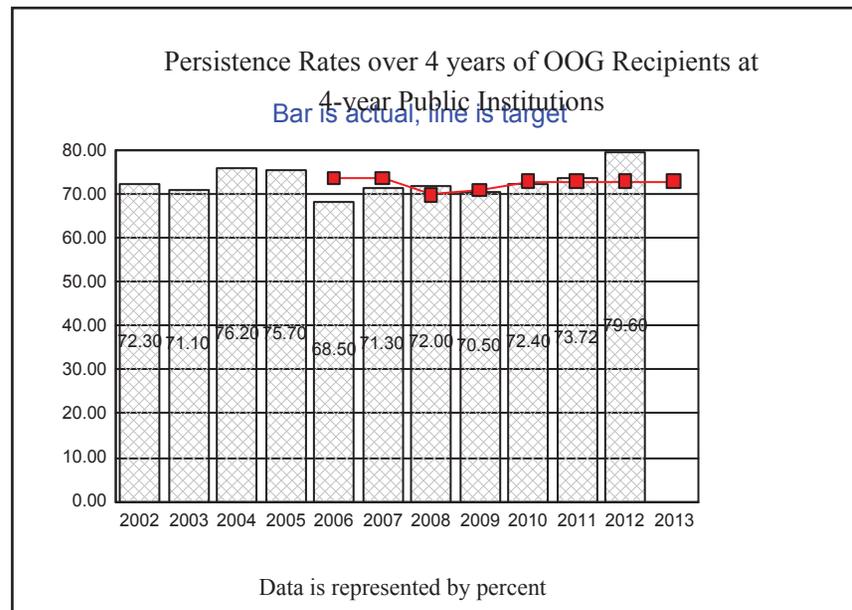
6. WHAT NEEDS TO BE DONE

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 submitted in program applications is stored as text files when submitted (every two years). We hope to improve our data management systems over the coming years.

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	Susan Degen, State Grants and Government Affairs Administrator, (541) 687-7451	



1. OUR STRATEGY

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 in this report. The 2012 performance data looks at 4-year persistence rates for first-year students who enrolled in an eligible 4-year public postsecondary institution in 2008-09, applied for financial aid by filing a Free Application for Federal Student Aid (FAFSA), and received an Oregon Opportunity Grant (OOG) in 2008-09. Performance is measured by the percentage of students in this cohort who continued to file a FAFSA in each subsequent year through 2011-12. Data for students who completed a FAFSA starting in 2008-09 but did not receive an OOG were also studied in order to have a comparison group but are not reported. The 2011-2012 number indicates that 79.6% of first-time OOG recipients in 2008-09 continued to apply for aid 4 years in a row, suggesting year-to-year persistence toward degree completion.

2. ABOUT THE TARGETS

The goal is to achieve a 73% persistence rate or higher. In 2008-09, Oregon implemented the Shared Responsibility Model (SRM) for determining OOG eligibility and award amounts and significantly increased program funding. The 2008-09 cohort is the first group of first-time OOG recipients whose awards were made under the SRM methodology. For the first two years after implementation of the SRM methodology, awards were higher than under previous program parameters and more students were eligible for the grant. Persistence rates for this first SRM cohort are higher than those in recent years, but it is too early to determine the impact of later budget reductions and more recent program changes on OOG recipients' persistence rates over time.

3. HOW WE ARE DOING

The 2008-09 cohort of first-time first-year OOG recipients exceeded the goal of 73%. The persistence rate of OOG recipients (79.6%) is significantly higher than those of non-recipients (44.2%). While this initially suggests that receiving the OOG improves persistence towards a degree, less is known about the group of nonrecipients, so comparisons are problematic. Persistence rates of OOG recipients do align favorably with the overall retention rates for full-time students at 4-year public postsecondary institutions in Oregon (see below), which is 74%. The analysis is inconclusive on the hypothesis that OOG affects persistence to a degree.

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 students attending public 4-year institutions in Oregon is 74% after two years. Persistence rates of 79.6% after four years for Oregon Opportunity Grant recipients compare very favorably with this two-year rate for students at 4-year institutions.

5. FACTORS AFFECTING RESULTS

To detect trends, the assumptions used in administering the OOG must remain the same. However, program parameters have changed annually since 2008-09, so assumptions are not consistent. External factors such as tuition increases, availability of other forms of aid (especially Federal Pell Grants), family finances, family crises, and changes in Oregon's economy may all affect students' decisions about going to college.

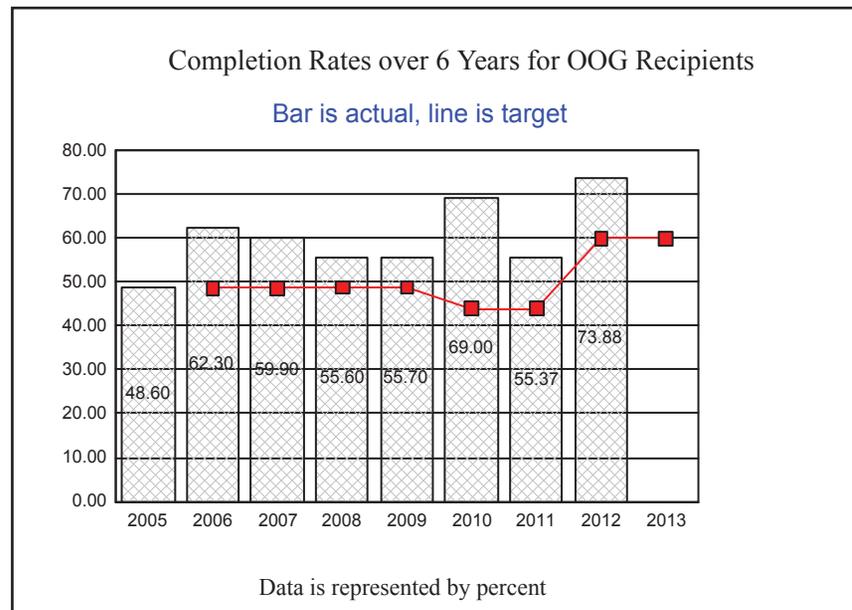
6. WHAT NEEDS TO BE DONE

The Shared Responsibility Model was first implemented in 2008-09, which was also soon after the start of the most recent economic recession. Total FAFSAs filed by potentially OOG-eligible applicants have increased from 130,249 in 2008-09 to 200,517 in 2011-12, an overall increase of 54%. Over this same period, college costs have increased by 5% to 7% per year, and appropriations for Opportunity Grants over the same period have remained relatively flat. 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, State Grants and Government Affairs, (541) 687-7451	



1. OUR STRATEGY

For each academic year, OSAC identifies a cohort group of first-year, first-time Oregon Opportunity Grant (OOG) recipients from six years prior to determine if they completed their degree (i.e., graduated) within 150% of the length of a 4-year program of study. OSAC uses an in-house database to

randomly select a representative sample of approximately 500 student records from recipient and non-recipient groups of students at institutions in the Oregon University System and conducts a data match with the National Student Clearinghouse to obtain completion information. This year's cohort group consists of first-year, first-time students from 2006-07 who completed their programs of study by the end of the 2011-12 academic year. The higher the percentage of completions, the more OOG recipients are successfully completing their programs of study within 150% of the length of their program – i.e., 6 years. The flaw in this strategy is that it implies that receipt of OOG funds has a direct effect on a student's ability to complete his/her degree – even if the student received OOG funds only once six years ago. In reality, the OOG is just one of several key factors that affect students' academic progress.

2. ABOUT THE TARGETS

Targets for 2011-12 and 2012-13 were based on average actual completion rates for the past 7 years – from 2004-05 to 2010-11 – rounded to the nearest whole number.

3. HOW WE ARE DOING

In comparison to completion (graduation) rates reported by colleges nationwide to the federal Integrated Postsecondary Educational Data System (IPEDS), Opportunity Grant recipients are performing above the national average. It is possible that the increase in the completion (graduation) rates for the 2012 cohort year can be attributed to the availability of a fully funded OOG program during two years of attendance (2006-07 and 2007-08) and two additional years (2008-09 and 2009-10) when more grants were available and at higher award levels than in the past. Other factors may include the start of economic recovery in Oregon, stability in college enrollments, and consistency in OOG application due dates and award amounts in the past two years. Future graduation rates will continue to be affected by changes in state appropriations and student demand as Oregon's economic conditions begin to recover.

4. HOW WE COMPARE

OSAC compares completion (graduation) rates of Opportunity Grant recipients with average rates of Oregon University System institutions, as reported annually to the federal Integrated Postsecondary Educational Data System (IPEDS) and posted on the College Navigator website. For 4-year institutions, IPEDS defines the graduation rate as the percentage of students in a given cohort of incoming first-year students who graduated within 150% of the published length of their program of study – i.e., 6 years for students enrolled full-time at 4-year institutions. The most current available national average graduation rate for 4-year public institutions is 55.1% for cohort year 2004 (i.e., started in 2004-05 and graduated by 2009-10). Data reported to IPEDS are always for the prior year, so the most recent average graduation rate for students at OUS institutions is 45% for cohort year 2005. Completion data from data-matches with the National Clearinghouse indicate that the average graduation rate for OOG recipients at OUS institutions is 73.88% for cohort year 2006-07. Although direct year-to-year comparisons are not possible, OOG recipients' completion rates for the most recent cohort year are above the most recently available state

and national averages.

5. FACTORS AFFECTING RESULTS

This KPM does not demonstrate the direct effect of the Opportunity Grant on recipients' completion rates because there too many variables that affect a student's decision to persist and complete his/her program of study on time – upturns/downturns in the state'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 (especially Pell Grants), changes in OOG 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 postsecondary education. The primary factor that can affect this performance is to have significant dollars available to each student consistently over what may be up to 4 to 6 years of college attendance.

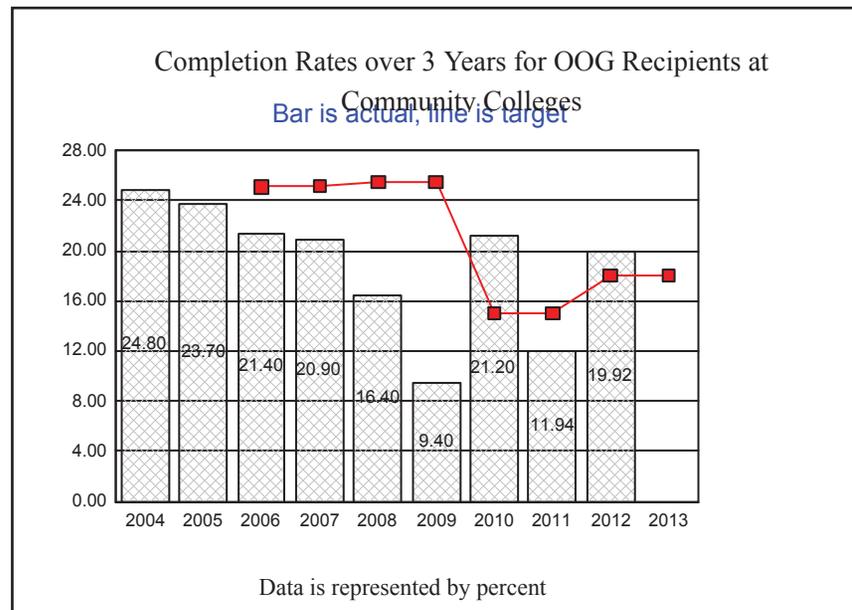
6. WHAT NEEDS TO BE DONE

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 at or below 55% of Oregon's median family income for the year). Research suggests that increasing award amounts to equal approximately 15% to 20% of a student's overall college costs may have a more positive effect on an individual student's ability to complete his/her program of study, 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 (OOG) recipients from three years prior to determine if they completed their degree (i.e., graduated) within 150% of the length of a 2-year program of study. OSAC uses an in-house database to

randomly select a representative sample of approximately 500 community college students who were OOG recipients and conducts a data match with the National Student Clearinghouse to obtain completion information. This year's cohort group consists of first-year, first-time OOG recipients from 2009-10 who completed their programs of study by the end of the 2011-12 academic year. The higher the percentage of completions, the more OOG recipients are successfully completing their programs of study within 150% of the length of their program – i.e., 3 years. The flaw in this strategy is that it implies that receipt of OOG funds has a direct effect on a student's ability to complete his/her degree -- -- even if the student received OOG funds only once three years ago. In reality, the OOG is just one of several key factors that affect students' academic progress.

2. ABOUT THE TARGETS

Targets for 2011-12 and 2012-13 were based on average actual completion rates for the past 7 years – from 2004-05 to 2010-11 – rounded to the nearest whole number.

3. HOW WE ARE DOING

In comparison to completion (graduation) rates reported by colleges nationwide to the federal Integrated Postsecondary Educational Data System (IPEDS), Opportunity Grant recipients are performing above the national average. It is possible that the increase for this cohort year may be attributed to improvements in the state's economy, stability in college enrollments, and consistency in OOG application deadlines and award amounts. Future graduation rates will continue to be affected by changes in state appropriations and student demand as Oregon's economic conditions begin to recover .

4. HOW WE COMPARE

OSAC compares completion (graduation) rates of Opportunity Grant recipients with average rates of Oregon community colleges, as reported annually to the federal Integrated Postsecondary Educational Data System (IPEDS) and posted on the College navigator website. For 2-year institutions (i.e., community colleges), IPEDS defines the graduation rate as the percentage of students in a given cohort of incoming first-year students who graduated within 150% of the published length of their program of study – e.g., 3 years for a 2-year associate degree. The most current available national average graduation rate for 2-year public institutions is 13.7% for cohort year 2007 (i.e., started in 2007-08 and graduated by the end of 2009-10). Data reported to IPEDS are always for the prior year, so the most recent average graduation rate at Oregon community colleges is 15% for cohort year 2008. Completion data from data-matches with the National Clearinghouse indicate that the average graduation rate at Oregon community colleges is 19.91% for cohort year 2009. Although direct year-to-year comparisons are not possible, OOG recipients' completion rates for the most recent cohort year are above the most recently available state and national averages.

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, sometimes earning a formal transfer degree, sometimes not. Some students who transfer to 4-year programs do not apply for graduation after 2 years at a community college even though they have earned enough credits to do so. Only after the student earns a certificate or degree does information about the student's chosen program of study and the length of the program become available. This KPM does not show the direct effect of the Opportunity Grant on recipients' completion rates because there are too many variables that may affect a student's decision to persist and complete his/her program of study—upturns/downturns in the state'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 (especially Pell Grants), changes in OOG 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 postsecondary education. The primary factor that can affect this performance is to have significant dollars available to each student consistently over what may be up to 4-6 years of college attendance.

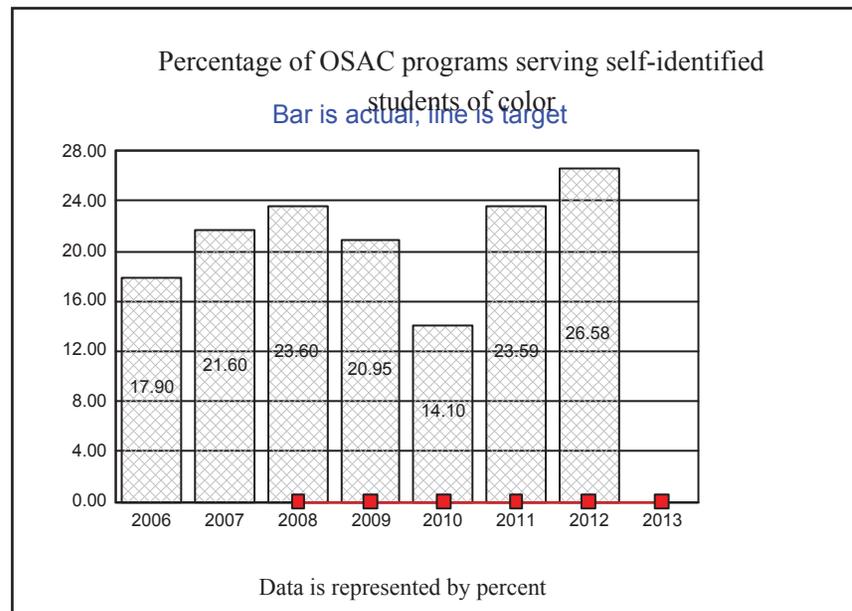
6. WHAT NEEDS TO BE DONE

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 at or below 55% of Oregon's median family income for the year). Research suggests that increasing award amounts to equal approximately 15% to 20% of a student's overall college costs may have a more positive effect on an individual student's ability to complete his/her program of study, 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 both internal and external sources. The KPM reports R/E totals for OSAC's two main programs – Private/Public 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 federal 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. OSAC has not set specific targets for this KPM, as it was deemed inappropriate to set targets based upon students' race and/or ethnicity. Instead, at the suggestion of the Interim Ways and Means Committee, OSAC compares 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

In 2009-10, all postsecondary institutions that participate in federal Title IV student financial aid programs and report to the Integrated Postsecondary Education Data System (IPEDS) changed data collection criteria to comply with new federal collection and reporting requirements. Schools must now 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 based on 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. Students can opt out of providing R/E information, but schools cannot include “decline” as a reporting option. Because of these recent changes in R/E categories, OSAC cannot compare data collected since 2010 with data from prior years.

4. HOW WE COMPARE

Data from 2010 established a new benchmark going forward, so it is not possible to compare data with prior years. For the 2011-12 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 was 26.58% 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 sites in 82 high schools in 2006-07 to 145 sites in 2011-12, reaching more students with information and individual mentoring. Because of changes in the way colleges collect and report students' race and ethnicity to IPEDS, OSAC will be unable to make year-to-year comparisons of R/E data for several years. For 2011-12, the number of total applicants who chose not to respond and those who answered "other" or "unknown" was 5.6% of respondents. This compares favorably with 2010-11, when the total number of nonrespondents and those who answered "other" or "unknown" decreased to 5.8% of total respondents. The total percentage of minority students increased for 2010-11, possibly because revised R/E categories may have encouraged more students to report.

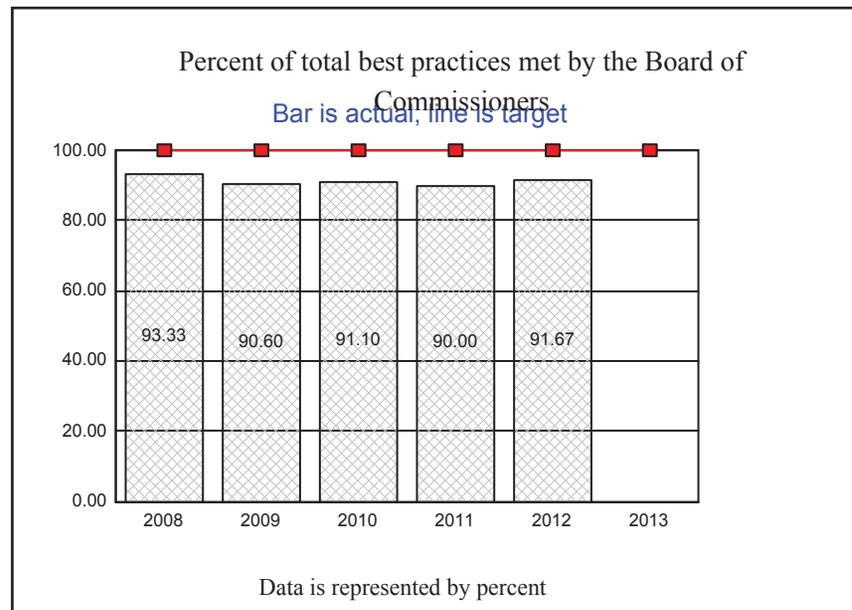
6. WHAT NEEDS TO BE DONE

OSAC hopes to implement a marketing plan with the express goal of making OSAC and our products a household word. Utilizing technology to communicate the value of OSAC is vital in a world where the traditional college students use only electronic sources 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, Interim Executive Director, Bob Brew, (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 fifth 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 July 2012. Four of the six Commissioners completed the survey and one chose to not answer all questions. During the past fiscal year, OSAC has had one open position on the Commission, resulting in only six instead of seven Commissioners participating in meetings. Two of OSAC's Commissioners are students. Neither chose to return their survey.

2. ABOUT THE TARGETS

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

3. HOW WE ARE DOING

During the five-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%; 2012 91.67%

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. It appears that the Legislature has deleted the performance measure for the Teacher Standards and Practices Commission, making it increasingly more difficult to compare to other education-related agencies.

5. FACTORS AFFECTING RESULTS

Two Commissioners chose not to answer some of the questions due to the timing (OSAC budget hadn't been reviewed yet at time of survey, policy option packages were not available yet, both items that would be submitted to the Commission within 60 days after the survey was complete), resulting in a score below 100%.

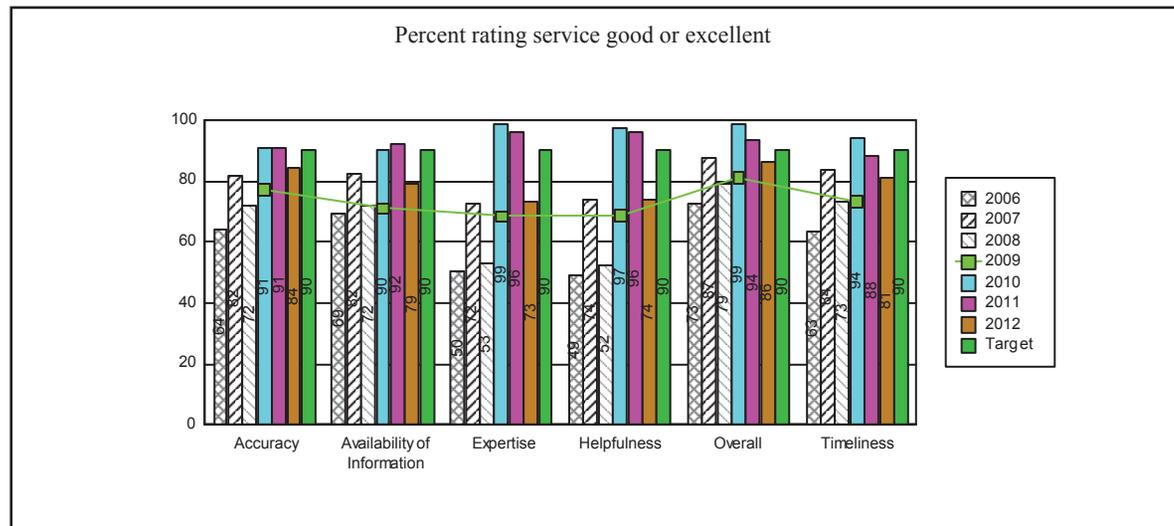
6. WHAT NEEDS TO BE DONE

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 the commission members and result 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, Interim Executive Director, Bob Brew, (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

2012 KPM, 32 Financial Aid Officers, 132 ASPIRE Site Coordinators, and 299 Scholarship Selection Committee Members (a total of 393) completed the survey. The total number of survey completers is up significantly from the previous number of 259 in 2011.

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, 85.97% of OSAC's client and constituent groups rated their overall customer satisfaction experience as "Good" or "Excellent" for 2012. This was a drop of 7.58% from the previous year.

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 has been employed since 2010, 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%; 2012: 85.97%

Timeliness 2006: 78.3%; 2007: 90.8%; 2008: 86.2%; 2009: 80.3%; 2010: 94.4%; 2011: 87.95%; 2012: 80.77%

Accuracy 2006: 80.5%; 2007: 89.8%; 2008: 90.4%; 2009: 86.9%; 2010: 90.9%; 2011: 91.13%; 2012: 84.41%

Helpfulness 2006: 86.0%; 2007: 87.8%; 2008: 90.9%; 2009: 89.4%; 2010: 97.4%; 2011: 96.20%; 2012: 73.89%

Expertise 2006: 88.3%; 2007: 87.6%; 2008: 92.7%; 2009: 89.6%; 2010: 98.7%; 2011: 96.09%; 2012: 73.10%

Availability of Information 2006: 81.5%; 2007: 86.1%; 2008: 85.8%; 2009: 80.3%; 2010: 90.0%; 2011: 92.28%; 2012: 78.90%

Three types of user groups were surveyed and for these groups, "don't know" responses ranged from 0% to 15.5%. The group with the most person-to-person contact with OSAC (Financial Aid Officers) had a lower percentage of "don't know" responses and a higher percentage of "Excellent" and "Good" than other groups. ASPIRE Coordinators had the highest percentage of "don't know" responses.

The total number of responders to the customer service survey had another significant increase for the second year in a row, up by another

52% over 2011. The increased number of survey respondents may be due to increased use of technology among customers. All customers now complete these surveys on-line, which makes for quick and easy access. There was a significant increase in the number of Scholarship Selection Committee survey responders, up from 126 in 2011 to 229 in 2012. OSAC encourages use of electronic scholarship application review and selection, an option that has not been available for three years.

The decrease in the "overall quality of service" rating is due to a variety of factors. The increase in Scholarship Selection Committee responders can be directly related to the availability of the survey to all selection committee members, not only the committee chair, as was the case in the past. Many of these committee members have no contact with OSAC outside of reviewing the scholarship applications and determining awardees. Lack of familiarity with OSAC processes seems to directly affect how they rate overall quality as well as individual categories. Those customers who deal directly with OSAC on an almost daily basis (Financial Aid Officers) consistently rated OSAC high in all of the individual categories as well as in Overall Quality.

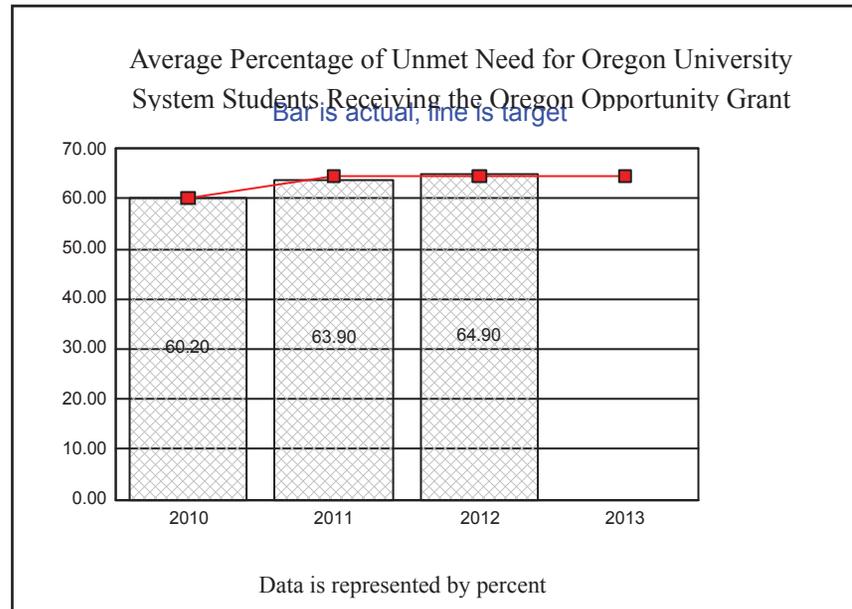
6. WHAT NEEDS TO BE DONE

OSAC has used the same methodology for the past three years to collect and analyze customer service survey data.

7. ABOUT THE DATA

Surveys were based on the 2011-12 school year cycle (September - June). The following groups were surveyed: Scholarship Selection Committees (clients); ASPIRE Site Supervisors (constituents); and Financial Aid Officers (constituents/clients). For Scholarship Selection Committee members, a link to the customer service survey was available while the member was accessing on-line scholarship selection materials. If the committee has chosen to not use on-line access, a paper copy of the survey was sent with the scholarship selection packet. Other groups received an email solicitation containing a link to an on-line 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 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, State Grants and Government Affairs, (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), which forms the

basis for the formula used to calculate Oregon Opportunity Grant (OOG) award amounts since 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 third 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. For 2011-12 data, the unmet need remaining after OOG and the Federal Pell Grant were factored in averaged 64.9%, almost exactly at the expected target rate. To maintain a standardized data set, OSAC is using data for Oregon's public university students. This is because the Oregon Legislature sets a maximum percentage of increase for cost of attendance at institutions in the Oregon University System (OUS). Oregon's community colleges set their own costs of attendance, which 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. The average cost of attendance at Oregon's public four year universities has increased from \$18,557 for the 2008-09 academic year to \$20,927 for 2011-12 academic year, an increase of 12.7%. Meanwhile, it was necessary to decrease the maximum OOG award 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 remained 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%

2011-12 – OUS 64.9%; Community Colleges 54.5%

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.

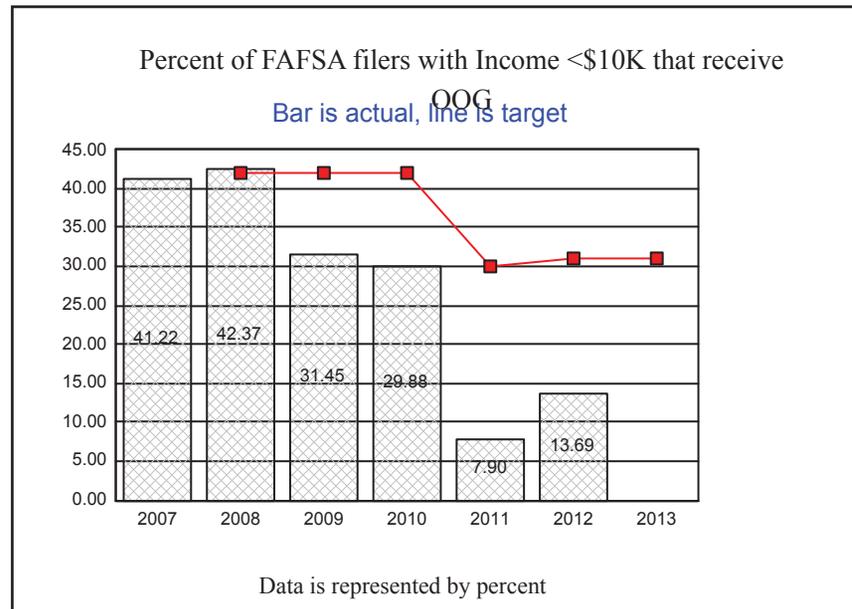
6. WHAT NEEDS TO BE DONE

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 and rising costs.

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, State Grants and Government Affairs, (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, which represents the group with the highest need.

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%; 2012 - 13.69%

\$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%; 2012 - 14.89%

\$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%; 2012 - 14.81%

\$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%; 2012 - 14.48%

\$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%; 2012 - 16.14%

\$50,000-\$59,999: 2005 - 0.00%; 2006 - 0.00%; 2007 - 0.20%; 2008 - 0.38%; 2009 - 21.22%; 2010 - 2.27%; 2011-.64%; 2012 - 15.59%

\$60,000-\$69,000: 2005 - 0.00%; 2006 - 0.02%; 2007 - 0.07%; 2008 - 0.27%; 2009 - 10.36%; 2010 - 1.43%; 2011-.28%; 2012 - 12.34%

\$70,000 or greater: 2005 - 0.01%; 2006 - 0.02%; 2007 - 0.06%; 2008 - 0.06%; 2009 - .49%; 2010 - .38%; 2011-.03%; 2012 - .37%

4. HOW WE COMPARE

Based on results of a 2011 survey of similar 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 relies totally 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 from families with incomes at or 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, and the maximum eligible income was raised to \$70,000. A decrease in the total appropriation for the Oregon Opportunity Grant in 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).

Agency Mission: To create a college-going culture for all Oregonians by providing access through information, mentoring, and financial support.

Contact: Susan Degen

Contact Phone: 541-687-7451

Alternate: Peggy Cooksey

Alternate Phone: 541-687-7443

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

1. INCLUSIVITY

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

* **Elected Officials:** Oregon's elected officials have determined OSAC's Key Performance Measures. All but one of OSAC's KPMs (#2) have been added or modified in 2005 or later by various legislative committees. The results of annual KPMs are reported to the Legislative Assembly during the agency's budget presentation before the Education Subcommittee of the Joint Committee on Ways and Means.

* **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. All APPRs are also posted on OSAC's website.

* **Citizens:** The KPM outcomes are reported annually at OSAC Commission meetings. These are publicly announced meetings that 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 agency staff and 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 aligns with the state's fiscal year. OSAC uses measures to

	determine ways to improve services to the students it serves.
3 STAFF TRAINING	State-sponsored training has been provided for staff members assigned with the responsibility for coordinating the agency's annual key performance measure reports. KPMs are also discussed during meetings of key administrative and program staff.
4 COMMUNICATING RESULTS	<p>* Staff : Key staff members participate in data collection and analysis during the development process for KPMs related to their programs. All staff members have access to final versions of KPM documents, which are posted on the agency website and presented at staff meetings .</p> <p>* Elected Officials: The Executive Director reports on the agency's KPMs in a presentation to the Education Subcommittee of the Joint Committee on Ways and Means during each legislative session. The most recent report to the legislature was in March 2011.</p> <p>* Stakeholders: KPMs are posted on the agency website: http://www.OregonStudentAid.gov/performance-measures.aspx. In addition, stakeholders and citizens can attend the KPM presentation made each year to OSAC Commissioners.</p> <p>* Citizens: Annual Performance Progress Reports are posted on the agency website: http://www.OregonStudentAid.gov/performance-measures.aspx.</p>