

LFO Revised Budget Form #107BF04c

**OREGON STUDENT ASSISTANCE COMMISSION  
Annual Performance Progress Report (APPR)  
for Fiscal Year 2006-07**

Original Submission Date: October 1, 2007  
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**Agency Mission**

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

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## Purpose of Report

The purpose of this report is to summarize the agency's performance for the reporting period, how performance data are used and to analyze agency performance for each key performance measure legislatively approved for the 2005-07 biennium. The intended audience includes agency managers, legislators, fiscal and budget analysts and interested citizens.

1. PART I: EXECUTIVE SUMMARY defines the scope of work addressed by this report and summarizes agency progress, challenges and resources used.
2. PART II: USING PERFORMANCE DATA identifies who was included in the agency's performance measure development process and how the agency is managing for results, training staff and communicating performance data.
3. PART III: KEY MEASURE ANALYSIS analyzes agency progress in achieving each performance measure target and any corrective action that will be taken. This section, the bulk of the report, shows performance data in table and chart form.

## KPM = Key Performance Measure

The acronym "KPM" is used throughout to indicate Key Performance Measures. Key performance measures are those highest-level, most outcome-oriented performance measures that are used to report externally to the legislature and interested citizens. Key performance measures communicate in quantitative terms how well the agency is achieving its mission and goals. Agencies may have additional, more detailed measures for internal management.

## Consistency of Measures and Methods

Unless noted otherwise, performance measures and their method of measurement are consistent for all time periods reported.

<b>2005-07 KPM#</b>	<b>2005-07 Key Performance Measures (KPMs)</b>	<b>Page #</b>
1	Percentage of growth in number of privately funded scholarships awarded	<b>8</b>
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3	Ratio of administrative dollars to private and public scholarship dollars awarded to students	<b>12</b>
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8	Persistence rates over 4 years for students at 4-year institutions who are eligible and awarded an OOG vs. eligible nonrecipients	<b>21</b>
9	Completion rates (graduated within 6 years) for students at 4-year institutions who are eligible and awarded an OOG vs. eligible nonrecipients	<b>23</b>
10	Completion rates (graduated within 3 years) for students at community colleges who are eligible and awarded an OOG vs. eligible nonrecipients	<b>26</b>
11	Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall service, timeliness, accuracy, helpfulness, expertise, availability of information.	<b>29</b>
12	Percentage of students of color served by OSAC programs (i.e., disaggregate measures to track race/ethnicity of beneficiaries of OSAC program services)	<b>34</b>

## Oregon Student Assistance Commission

## 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/services addressed by key performance measures
  - a) **Oregon Opportunity Grant** is Oregon's largest state-funded, need-based program. Each year it assists eligible students with higher education expenses. Established in 1971, revised and expanded in subsequent biennia, Oregon Opportunity Grant program funds consist mainly of General Funds with approximately \$2 million in federal funds each biennium and a similar amount of Lottery funds. In 2006-07 more than 27,600 students received over \$33 million in Opportunity Grants.
  - b) **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.
  - c) **Scholarship, Grant, and Loan Repayment Programs** include more than 370 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 2006-07, more than 3,200 college and university students received over \$13 million through this array of programs. This reflects increases of approximately 100 students and \$1 million over 2005-06.
- Agency programs/services, if any, not addressed by key performance measures
  - a) **ASPIRE** (Access to Student assistance Programs in Reach of Everyone) is a high school-based mentoring program that helps students to access postsecondary education opportunities. In 2006-07, ASPIRE worked in 82 Oregon high schools; nearly 1,000 volunteers and high school-based coordinators served approximately 25,000 students. ASPIRE personnel are developing KPMs to track their progress. The program is already included in the OSAC customer service survey.
  - b) **OSAC access improvements:** In the 2005-06 progress report, OSAC reported the need to improve access to Spanish-language materials on OSAC websites. For 2006-07, OSAC has *Opportunities* booklets available in Spanish, which assists more Spanish language students and advisors each year. The College Goal Oregon website is also accessible in both English and Spanish.

### 2. THE OREGON CONTEXT

Since the 2005-07 biennium, the picture for student financing of higher education in Oregon has improved in most areas but has deteriorated in others. The Oregon Employment Department reports that 87% of the new jobs to be created in the next four years will require an associate's degree or higher. The College Board and numerous other research groups have established the positive relationship between higher learning and higher wage jobs, leading to a higher tax base and greater 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, data from the OUS Institutional Research Services and the Oregon Department of Education show a decline in the rate of postsecondary participation for recent high school graduates; the rate has decreased from a high of 23.8% in 2001-02 to 20.8% in 2004-05. The National Center for Public

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Policy and Higher Education reports that for every 100 Oregon students who graduate from high school, 33 have gone on to college, compared to a national average of 40; of this 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 above, the 2005 Legislative Assembly approved an increase in Oregon Opportunity Grant (OOG) funding of more than 70% for the 2005–07 biennium. The 2007 Legislative Assembly continued this program expansion for the 2007–09 biennium by increasing OOG funding another 70% to \$106 million. Working in concert with colleagues in the university system, private 4-year colleges, and the community colleges, OSAC continues to explore ways to expand and increase the effectiveness of the OOG, 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.

Simultaneously, OSAC will work to expand the benefits of the ASPIRE program to all high schools and, ultimately, to all Oregon high school students who need them. The ASPIRE program, in conjunction with the increase in funds, was able to serve more than 80 high schools in 2006-07. Further expansion will occur during the 2007-09 biennium with the addition of General Fund moneys.

For 2005–07, the Commission had three goals related to its mission: 1) increase Oregon Opportunity Grant funding; 2) increase the number of scholarship programs administered by OSAC; and 3) increase the number of Oregon high schools that participate in the ASPIRE program. Meeting these goals will contribute to an increase in the participation of Oregonians in higher education programs and the attainment of degrees, as highlighted by Oregon Benchmarks 24, 25 and 26:

<b>Benchmark 24</b>	Percent of Oregon adults (25+) who have completed some college
<b>Benchmark 25</b>	Percent of Oregon adults (25+) who have postsecondary professional-technical credentials
<b>Benchmark 26</b>	Percent of Oregon adults (25+) who have completed: a. bachelor's degree, b. advanced degree

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## I. EXECUTIVE SUMMARY

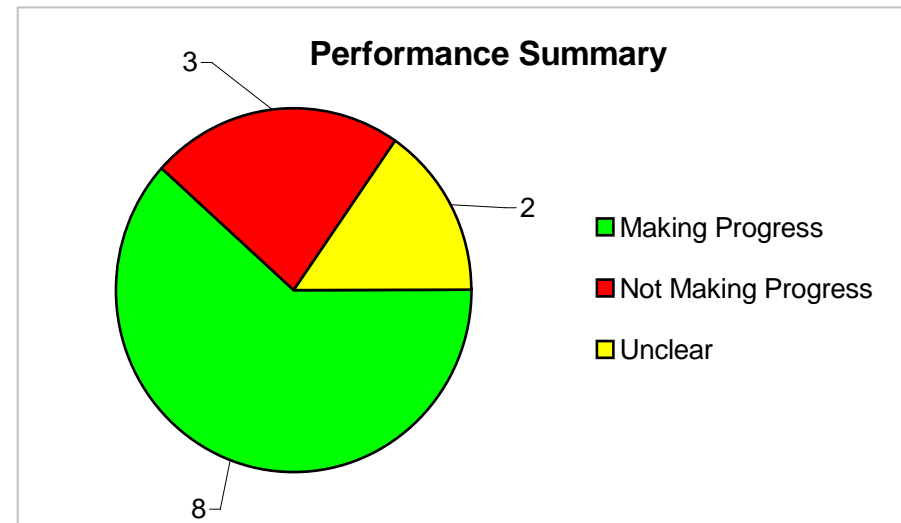
### 3. PERFORMANCE SUMMARY

OSAC's Annual Progress Report for 2005-06 contained 12 KPMs, including four new KPMs marked "develop." The Joint Legislative Audit Committee (JLAC) reviewed OSAC's proposed strategies for these new KPMs and approved proposed data collection strategies and targets. JLAC also added one new KPM, and directed OSAC to work with its Legislative Fiscal Analyst to set targets for two new KPMs. A total of nine KPMs have been since the 2005 Legislative Session ended. Many of these have only one or two years' worth of actual data. With limited data, it is too early to identify trends or to determine with any certainty whether OSAC is making progress on some new KPMs. Limited data also makes it difficult to set initial targets and determine how reasonable they are

### 4. CHALLENGES

OSAC faces challenges uniquely related to its diverse programs and, in turn, related to the KPMs for these programs, specifically for the following measures:

- Without a donor relations or fundraising professional on staff, OSAC must work collaboratively with outside organizations and rely on its network of current donors and influencers to generate new scholarship interest. (KPM #1)
- With only two staff members in the Office of Degree Authorization (ODA), the temporary absence of either one or a large workload can slow down planned reviews. Most institutions with new program proposals that require ODA involvement are able to resolve problems after an exchange of information, so the percentage of programs denied is very low (KPMs #2, #4, #5)
- Oregon is unique in supporting a successful public/private scholarship program; 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)
- The number of degree validation cases resolved by ODA is not a case of "good" or "bad" results, but rather the public awareness of potential fraud. (KPM #6)
- OSAC cannot obtain directly student data on student race-ethnicity, program completions, or enrollment. To collect data for performance measures on these issues, OSAC must initiate data-sharing agreements with various institutional partners and third parties (at a cost per record, in some cases) and find ways to quantify data received from data exchanges. (KPMs #7, #9, #10, #12)
- Student populations vary by institution type, by dependency status, by income, and even by degree goals. Measurements of student success must accommodate this variety. (KPMs #7, #8, #9, #10).
- Defining OSAC's "customers" is problematic because OSAC staff members do not normally interact directly with most of the students served by OSAC-administered programs. (KPM#11)



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- o Data measuring Percentages of Students of Color Served by OSAC Programs are available for the 7,000+ scholarship applicants but are not directly available for OOG recipients—by far the largest population served at more than 27,600 students in 2006-07. (KPM #12)

**5. RESOURCES USED AND EFFICIENCY**

2005-07 Budget Summary

General Fund	\$78,882,133
Lottery Funds	\$1,527,619
Other Funds	\$3,584,419
Other Funds Non-ltd	\$9,014,812
Federal Funds	\$2,103,860

Efficiencies

Of the Commission’s 12 performance measures, KPM #3 (Private/Public Scholarship \$\$ per \$1 Administration) is clearly an efficiency measure. This is the second year that OSAC has reported data on this measure. In 2006-07, OSAC had a total FTE of 23 staff members, who administered \$47 million in grant and scholarship aid to Oregon students. An ongoing challenge will be to continue to absorb greater volume without increasing the share of administrative expense.

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**II. KEY MEASURE ANALYSIS**

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KPM #1	GROWTH OF PRIVATE SCHOLARSHIPS AWARDED Percentage of growth in number of privately funded scholarships awarded	Measure since: 1999
<b>Goal</b>	Goal 1: Increase college attendance and completion in Oregon	
<b>Oregon Context</b>	Oregon Benchmarks #24, #25, #26	
<b>Data source</b>	Create Partners in Education Fund with The Oregon Community Foundation	
<b>Owner</b>	Scholarship and Access Programs, Vicki Merkel, Director, (541) 687-7385	

**1. OUR STRATEGY**

The agency’s goal is to increase the number of scholarship awards to students. Private donors, not public sources, fund these scholarships. OSAC has relied upon its partnership with the Oregon Community Foundation for donor development activities since the agency downsizing in January 2005. Data for this measure are based on counts of the number of scholarship awards made each year. The annual number of awards that can be made by each scholarship program varies due to market influences.

**2. ABOUT THE TARGETS**

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

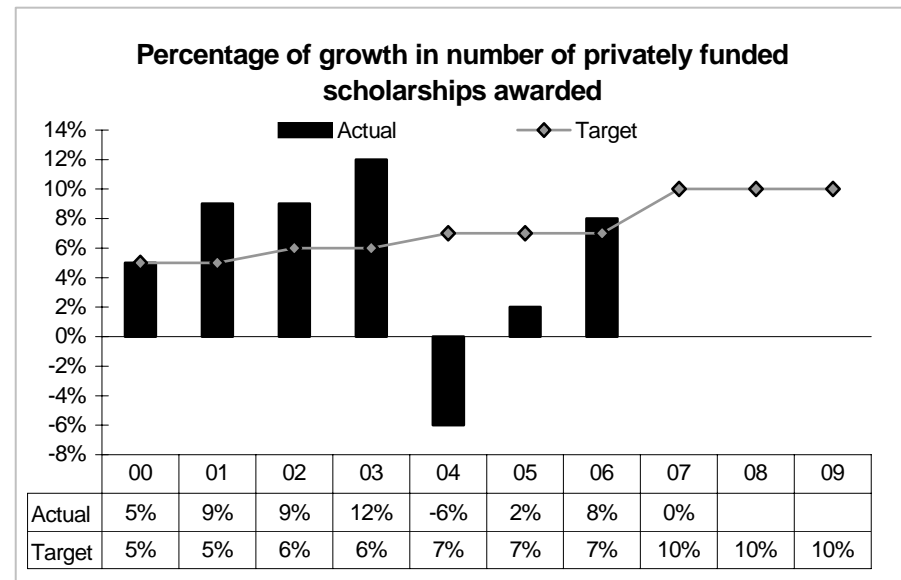
**3. HOW WE ARE DOING**

OSAC’s partnership with private foundations is unique in the nation. These private scholarship dollars impact both access, by helping to lower education costs, and student borrowing, by lessening students’ dependence on loans.

Nationally nearly two of every three undergraduate students are going into debt to go to college, borrowing an average of more than \$19,000. In Oregon three of every four students (76.5 percent) take out student loans with an average of \$17,772 total loans, and \$16,641 federal loans (Source: Department of Education's National Center for Education Statistics). A September 2007 report from the Project on Student Loan Debt shows average debt at \$19,600 for students graduating from 4-year institutions in Oregon. More Oregon students are taking out loans than the national average, but the loan debt is a bit lower. Private scholarships can be a tool to reduce student indebtedness.

Despite its relatively small dollar value compared to other sources of financial assistance, private scholarship aid is a critical part of the overall national goal of improving access to higher education. Private scholarship aid stands apart from government and institutional aid in three important ways:

- It helps students who slip through the cracks of other aid programs.



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- It facilitates choice and affordability for students of varying income levels.
- It provides a testing ground for new approaches to student financing.

(Source: Institute for Higher Education Policy: Private Scholarships Count: Access to Higher Education and the Critical Role of the Private Sector Report)

**4. HOW WE COMPARE**

Oregon is unique in the country as the only state government with an agency that partners with private donors and foundations to administer scholarships to college students. These activities are financed completely by Other Funds, based on administration fees charged to donors. The unified scholarship application is also unique to Oregon. Students may apply for up to 20 separate scholarship programs using one unified application form, which helps increase the applicant pool for donors and provide access to students.

**5. FACTORS AFFECTING RESULTS**

The agency's growing portfolio of privately funded scholarship programs demonstrates that private citizens, organizations, and employers are interested in helping students go to college and that they have confidence in OSAC's ability to administer their programs. The agency has been able to add new scholarships to its portfolio and increased the total dollar volume of scholarships awarded every year for the past 5 years. Market trends do affect the returns on endowed funds and, therefore, the amount of interest available to use as scholarship awards. The Partners in Education (PIE) Fund, established in cooperation with the Oregon Community Foundation, gives OSAC a new vehicle for encouraging smaller donors to establish a named scholarship (\$12,500 minimum endowment compared to prior minimum requirement of \$50,000).

**6. WHAT NEEDS TO BE DONE**

OSAC needs to develop marketing tools, including streamlined individual scholarship criteria, so that potential donors have clear information on how to define their intent. In the 2006 annual progress report, OSAC indicated a need for a staff person who could proactively reach out to the philanthropic community, and small community and high school foundations. The 2007 Legislative Assembly approved a Scholarship Coordinator position that will help the agency expand its outreach activities into the philanthropic community. These strategies would enhance the ability to increase scholarships beyond relying on current partnerships to cultivate donors.

**7. ABOUT THE DATA**

Data reported are based on scholarships awarded for a specific academic year. The 2006-07 academic year = 2007 KPM report period.

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KPM #2	TIME TO COMPLETE A DEGREE PROGRAM REVIEW Time to complete a degree program review	Measure since: 1999
<b>Goal</b>	Goal 2: Protect the value of a college degree	
<b>Oregon Context</b>	Oregon Benchmarks #24, #25, #26	
<b>Data source</b>	ODA tracking spreadsheet (contains all needed data)	
<b>Owner</b>	Office of Degree Authorization (ODA), Alan Contreras, Administrator (541) 687-7452	

**1. OUR STRATEGY**

Review new programs first, develop ways to avoid duplicate reviews; evaluate staffing patterns.

**2. ABOUT THE TARGETS**

Targets are based on known arrival dates of renewals, projected arrivals of new programs and available staff resources

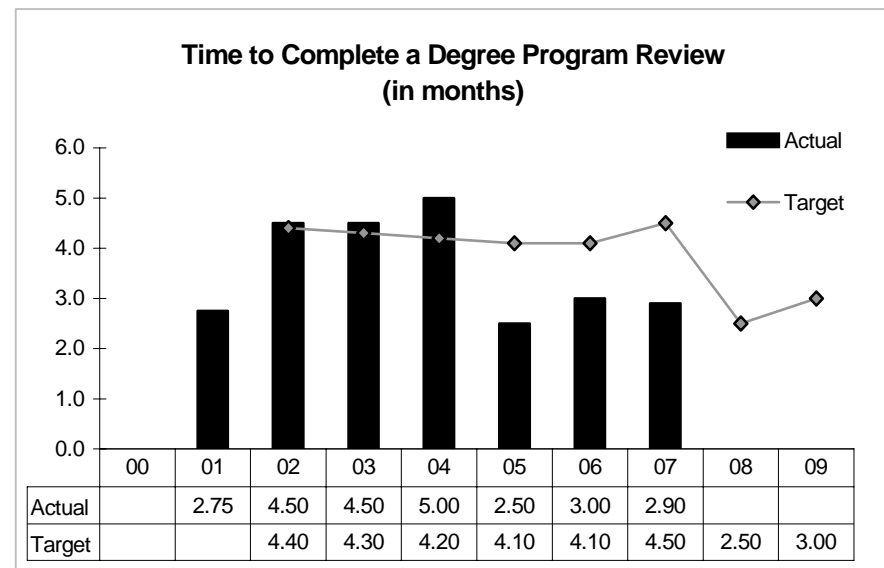
**3. HOW WE ARE DOING**

ODA has reduced time to completion of program reviews significantly in recent years by more carefully managing the arrival time of renewals. Schools are told in advance whether staff workloads will allow a review to begin on a specific date, which reduces the time that reviews sit at ODA after submission. We still have some “bubbles” that need to be spread out to make staff workload more even. The principal bubbles occur when schools with many programs, e.g., University of Phoenix or ITT Technical, arrive. Those workload bubbles appear in 2004 and 2007 (projected) in the data.

**4. HOW WE COMPARE**

We asked other states that conduct a complete review of programs how long it takes them to conduct reviews. Reviews vary 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)
- Kentucky** - 1 to 2 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



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**Florida** - 3 months

**Georgia** - 3 to 4 months

**Minnesota** - 6 months

**5. FACTORS AFFECTING RESULTS**

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

**6. WHAT NEEDS TO BE DONE**

Our opinion is that the current average turnaround time of less than four months per program cannot be significantly reduced with a two-person staff. Application level is not high enough to justify additional review staff. Depending on the unit’s budget, we could use contracted reviewers during “bubble” periods, but in practice this does not work well because the bubbles involve so many programs from a small number of schools. We would have duplicated effort with more than one person evaluating the same issues at ITT, for example.

**7. ABOUT THE DATA**

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

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**II. KEY MEASURE ANALYSIS**

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<b>KPM #3</b>	<b>PRIVATE/PUBLIC SCHOLARSHIP \$\$ PER \$1 ADMINISTRATION</b>	<b>Measure since:</b>
	<b>Ratio of administrative dollars to private and public scholarship dollars awarded to students</b>	<b>New</b>
<b>Goal</b>	Goal 1: Increase college attendance and completion in Oregon	
<b>Oregon Context</b>	Oregon Benchmarks #24, #25, #26	
<b>Data source</b>	Increase effectiveness and efficiency of administering private and public scholarships; increase number of private scholarships.	
<b>Owner</b>	Scholarship and Access Programs, Vicki Merkel, Director (541) 687-7385	

**1. OUR STRATEGY**

The agency’s goal is to increase efficiency in the processing and awarding of scholarships. OSAC administers financial aid scholarships for a variety of partners, including The Oregon Community Foundation, The Ford Family Foundation, Oregon Department of Human Services, Oregon Department of Education, Office of Rural Health and the Oregon National Guard.

This KPM compares administrative costs (personal services plus services & supplies) for Scholarship Services staff from Other Funds to Total Scholarship Dollars disbursed to students.

**2. ABOUT THE TARGETS**

The higher the dollar actual dollar amount, the better the agency is doing in providing more funds to students at a lower administrative cost.

**3. HOW WE ARE DOING**

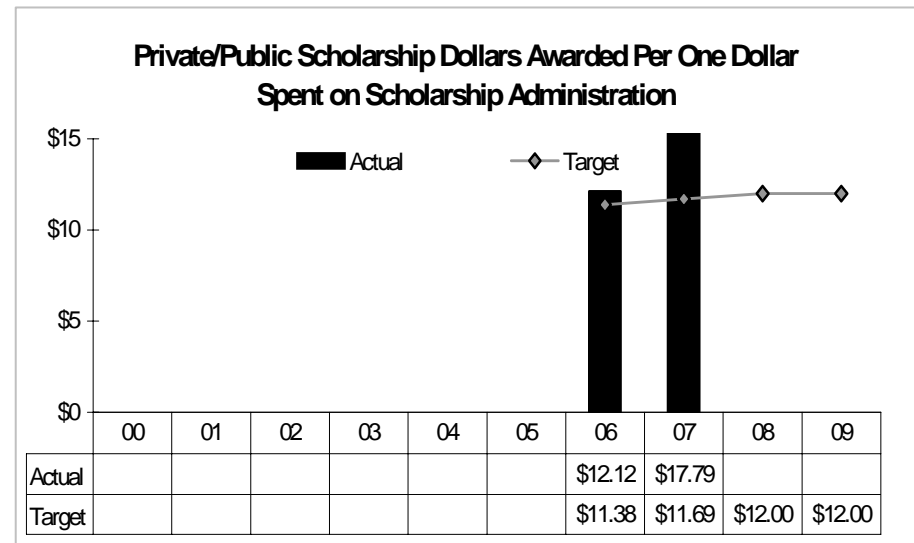
This is the second year OSAC has reported this data for a Key Performance Measure.

**4. HOW WE COMPARE**

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

**5. FACTORS AFFECTING RESULTS**

The private awards program has grown over the past twenty years and utilizes a variety of technology solutions to administering the individual programs, including processing of applications, selection of awardees, and disbursement of funds to schools. Current processes are improving and decreasing staff time due to the upgrading of software by the agency’s Information Technology staff.



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**6. WHAT NEEDS TO BE DONE**

In 2007, OSAC upgraded its services by building a new software program to increase the efficiency of scholarship administrative processes. System enhancements will continue into 2007-08.

**7. ABOUT THE DATA**

Data reported are based on scholarships awarded for a specific academic year. The 2006-07 academic year = 2007 KPM report period.

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KPM #4	NUMBER OF DETRIMENTAL DUPLICATION ISSUES RESOLVED BY ODA Number of detrimental duplication issues resolved by ODA	Measure since: New
<b>Goal</b>	Goal 2: Protect the value of a college degree	
<b>Oregon Context</b>	Oregon Benchmarks #24, #25, #26	
<b>Data source</b>	Each case has a separate file that can be reviewed.	
<b>Owner</b>	Office of Degree Authorization (ODA), Alan Contreras, Administrator (541) 687-7452	

**1. OUR STRATEGY**

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

**2. ABOUT THE TARGETS**

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

**3. HOW WE ARE DOING**

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

**4. HOW WE COMPARE**

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

**5. FACTORS AFFECTING RESULTS**

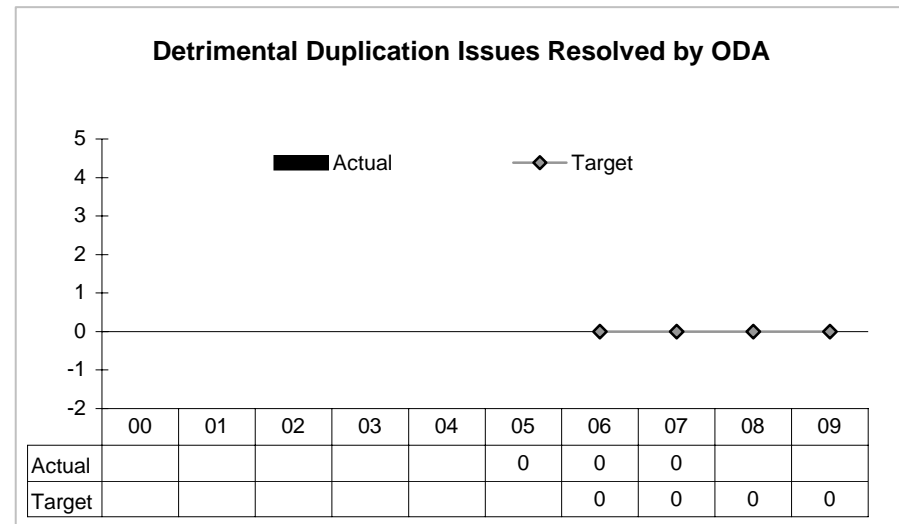
Lack of funds in the public sector and a robust private higher education sector are probably the reason why there have been so few adverse impact issues raised in recent years.

**6. WHAT NEEDS TO BE DONE**

The current low case level is good. ODA should continue to encourage communication among sectors.

**7. ABOUT THE DATA**

There are so few cases that data consists of isolated points over a period of years. ODA receives no funding dedicated to this specific activity.



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KPM #5	PERCENTAGE OF NEW PROGRAM PROPOSALS REQUIRING ODA INVOLVEMENT Percentage of new program proposals requiring ODA involvement — 5a) Percentage of applications for new programs denied by OSAC; 5b) Total program applications processed by ODA.	Measure since: New
<b>Goal</b>	Goal 2: Protect the value of a college degree	
<b>Oregon Context</b>	Oregon Benchmarks #24, #25, #26	
<b>Data source</b>	This KPM has been separated into two parts	
<b>Owner</b>	Office of Degree Authorization (ODA), Alan Contreras, Administrator (541) 687-7452	

**1. OUR STRATEGY**

At the suggestion of OSAC’s Legislative Analyst, this KPM has been split into 5a and 5b. Part 5a has a permanent 2% goal that is the “percentage of applications for new programs denied by ODA.” Part 5b will simply be the number of total program applications received in a biennium, goal numbers to begin with 2005-07 and include 2007-09 with identical placeholder numbers beyond that.

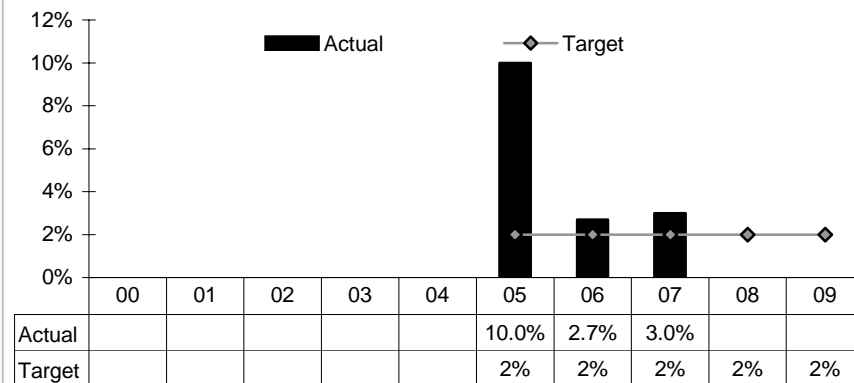
**2. ABOUT THE TARGETS**

The estimated number of programs to review for 2005–07 is 95, and for 2007–09 is 75. Existing programs are reviewed for reapproval every 3 years, on a rotating cycle. Targets reflect known programs for which institutions will apply for reapproval. Program reviews are counted individually; some institutions offer several programs, others only a few.

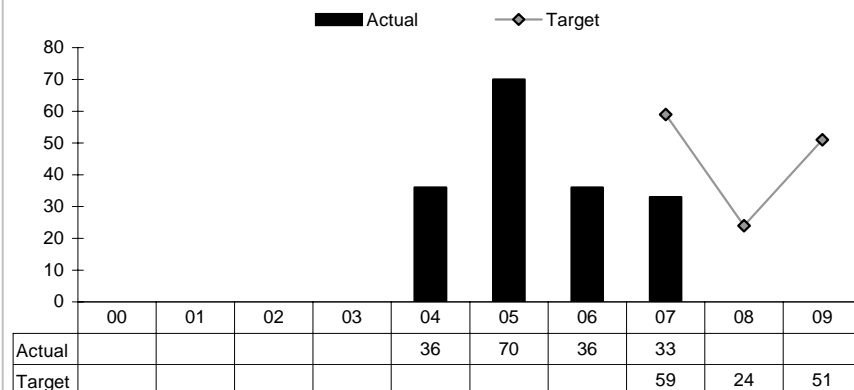
**3. HOW WE ARE DOING**

OSAC has had only two formal denials of full-scale schools in seven years. In the worst cases, the applicants fail to respond to the review letter once it is clear that they cannot meet the standards. The denial was an entity that was determined to keep trying even though it was hopeless. The program approval process is not like licensure, where everything is approved or denied. There is almost always an exchange on how to meet various standards. There have also been a couple denials under the “section d” evaluations of non-Oregon schools that want approval for their degree use in Oregon.

**Percentage of New Program Proposals Requiring ODA Involvement**



**Total Program Applications Processed by ODA**



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**4. HOW WE COMPARE**

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

**5. FACTORS AFFECTING RESULTS**

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

**6. WHAT NEEDS TO BE DONE**

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

**7. ABOUT THE DATA**

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

**AGENCY NAME: Oregon Student Assistance Commission**

**II. KEY MEASURE ANALYSIS**

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

KPM #6	NUMBER OF DEGREE VALIDATION CASES RESOLVED BY ODA Number of degree validation cases resolved by ODA	Measure since: New
<b>Goal</b>	Goal 2: Protect the value of a college degree	
<b>Oregon Context</b>	Oregon Benchmarks #24, #25, #26	
<b>Data source</b>	Keep all records of all staff actions, presentations, and active cases.	
<b>Owner</b>	Office of Degree Authorization (ODA), Alan Contreras, Administrator (541) 687-7452	

**1. OUR STRATEGY**

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

**2. ABOUT THE TARGETS**

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

**3. HOW WE ARE DOING**

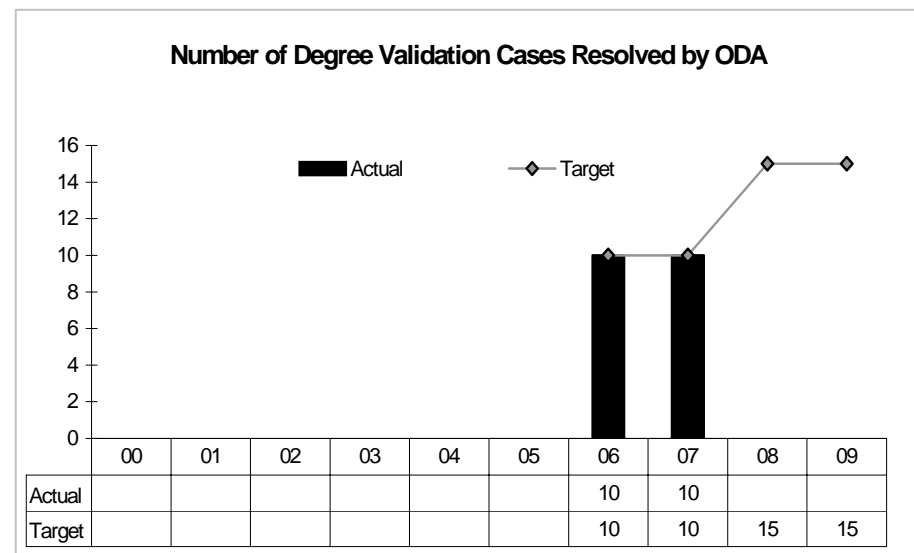
Case counts are fairly steady, reflecting a relatively low public education effort by the agency. Occasional “bubbles” tend to be related to media coverage of a fake degree case, which often flushes out a couple of additional cases. ODA’s website continues to be the national leader, averaging about one hit per minute and serving as the principal source for basic information on degree mills for state and local agencies as well as federal units.

**4. HOW WE COMPARE**

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

**5. FACTORS AFFECTING RESULTS**

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



**AGENCY NAME: Oregon Student Assistance Commission**

**II. KEY MEASURE ANALYSIS**

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

**6. WHAT NEEDS TO BE DONE**

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

**7. ABOUT THE DATA**

ODA tracks data annually and, every other year, on a monthly basis by topic in order to determine what kinds of inquiries and cases are received and from what sources. Current data based on six months of tracking shows about 11 degree validation inquiries received each month, with 57 percent related to domestic degrees and 43 percent to foreign degrees. Of these, 58 percent come from private individuals or businesses, 28 percent from colleges (public and private) and 24 percent from public agencies (mostly state agencies) other than colleges.

**AGENCY NAME: Oregon Student Assistance Commission**

**II. KEY MEASURE ANALYSIS**

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

KPM #7	IMPACT OF OPPORTUNITY GRANTS ON ENROLLMENT Impact of Opportunity Grants on Enrollment of Eligible Students	Measure since: New
<b>Goal</b>	Goal 1: Increase college attendance and completion in Oregon	
<b>Oregon Context</b>	Oregon Benchmarks #24, #25, #26	
<b>Data source</b>	OSAC data base	
<b>Owner</b>	Oregon Opportunity Grant Program, Susan Degen, Administrator, (541) 687-7451	

**1. OUR STRATEGY**

The Commission proposed a tentative measure to the Joint Legislative Audit Committee (JLAC) that needs to be modified because data on nonrecipients are not available. The revised strategy compares the number of OOG recipients to the total number of FAFSA filers (i.e., OOG applicants) for seven income ranges from \$0 to approximately the median family income for Oregon (\$61,250 for a family of four in 2007, U.S. Census Bureau).

Underlying data for each income range are collected by institution type, enrollment status (full-time or half-time), and dependency status and are compared to the total pool of applicants. Data on students who do not apply for financial aid by submitting a Free Application for Federal Student Aid (FAFSA) form are not available. This data will allow the Legislature to review how funding and program changes in the Oregon Opportunity Grant affect numbers of lower-income students in Oregon postsecondary institutions.

Year Ending	\$0- \$9999	\$10K- \$19999	\$20K- 29999	\$30K- \$39999	\$40K- 49999	\$50K- \$59999	\$60K +
2000							
2001							
2002							
2003							
2004							
2005							
2006	22.5%	19.2%	15.1%	8.0%	1.9%	0.0%	0.0%
2007	29.4%	23.1%	19.0%	10.1%	2.7%	10.0%	0.0%
2008							
2009							

**2. ABOUT THE TARGET**

JLAC has directed OSAC to work with the Legislative Fiscal Office to develop appropriate targets for this KPM. OSAC staff will meet with analysts from LFO and BAM in early October to discuss this measure and possible targets.

**3. HOW WE ARE DOING**

Data for the most recent two academic years—2005-06 and 2006-07—suggest that funding increases by the 2005 Legislative Assembly resulted in increases in total grant recipients at all income levels, most significantly in the lowest three income ranges. These increases reflect recent program changes that expanded award eligibility to students enrolled at least half time in 2006-07. Program expansion to half-time students offset small declines in the lowest income ranges, possibly indicating students in these ranges would prefer to enroll for lower credit loads. Many of these students may have work or family obligations

**4. HOW WE COMPARE**

This KPM is still being developed. In February 2005, OSAC surveyed other state agencies that administer state-funded need-based grants programs. At that time, OSAC was farther along in developing key performance measures than any other state agency in the country. OSAC will initiate a new survey in 2008 to find out if any other states have added comparable program measures.

**AGENCY NAME: Oregon Student Assistance Commission**

**II. KEY MEASURE ANALYSIS**

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

**5. FACTORS AFFECTING RESULTS**

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

**6. WHAT NEEDS TO BE DONE**

OSAC just completed the first year of a significant program expansion, so it is too early to be able to determine the true effects of increased program funding and program expansion to all eligible full-time and part-time students.

**7. ABOUT THE DATA**

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

**AGENCY NAME: Oregon Student Assistance Commission**

**II. KEY MEASURE ANALYSIS**

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

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

**1. OUR STRATEGY**

This measure tracks student-applicants’ annual submissions of the Free Federal Application for Financial Aid (FAFSA) to US Dept of Education. The FAFSA is the application for most federal student aid programs and for the Oregon Opportunity Grant. Filing a FAFSA in subsequent years is a good indicator of a student’s intent to persist toward program completion.

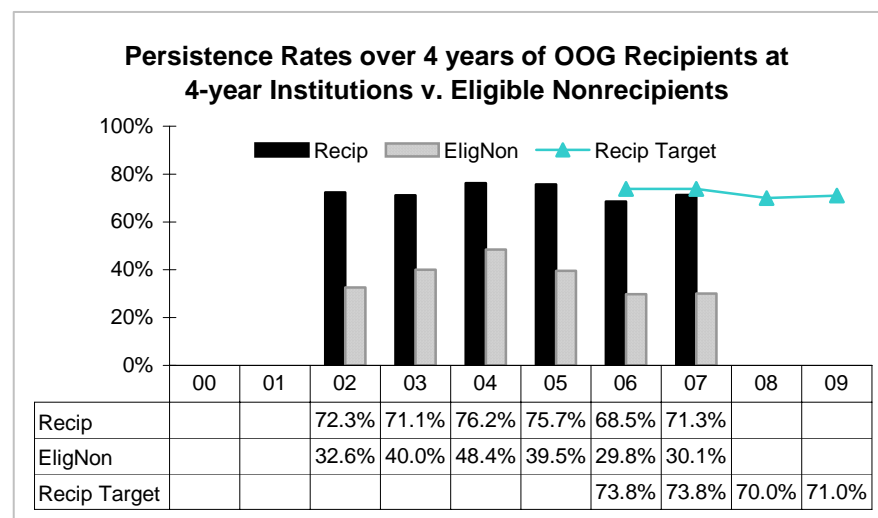
After the end of each academic year, OSAC runs a query that identifies eligible first-year students and compares this cohort group’s filings in subsequent academic years to determine how many continue to submit FAFSAs. OSAC also compares the renewal application (persistence) rates of both recipients and eligible nonrecipients.

“Eligible nonrecipients,” or “late filers,” are students who would have been eligible to receive an Opportunity Grant if sufficient funding had been available to serve all students for that particular academic year. In years when funding was limited, OSAC has used cutoff dates, based on institutional type, as the primary mechanism. Cutoff dates could not be published because they were based on application filing rates, by institutional segment, during award processing each year.

Data are compiled after the end of the academic year, usually by early fall. The most recent cohort group looks at 4-year persistence rates for first-year students who started in 2001-02 and filed FAFSAs through 2005-06.

**2. ABOUT THE TARGETS**

Data were initially compiled in February 2005, when OSAC first developed this as a proposed KPM. Because some students remain at the same grade level for multiple years, OSAC’s initial attempts at calculating persistence rates may have included some first-year students in more than one cohort group. The query used to identify the students included in each cohort group has since been refined. After calculating the persistence rate for 2006, OSAC recalculated rates for prior years. Based on this new data, previously reported rates for years prior to 2006 should range from 62.7% to 68.6% for grant recipients and from 28.3% to 34.5% for eligible nonrecipients.



**AGENCY NAME: Oregon Student Assistance Commission****II. KEY MEASURE ANALYSIS**

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

The most current persistence rates, for 2007, are for first-year students in 2003-04 who continued to file FAFSAs for four consecutive years, through 2006-07. The Opportunity Grant was not available to all students who met income eligibility criteria until 2006-07, so rates for cohort groups of first-year students prior to 2006-07 include rates for both recipient and eligible nonrecipients. Recipients are defined as those students who received at least one disbursement of an Oregon Opportunity Grant as a first-year student during the award year. Eligible nonrecipients, or "late-filers," are students who missed the segmental cutoff date for the first Oregon school listed on their FAFSA.

With the expansion of the Oregon Opportunity Grant (OOG) program to part-time students in the 2006-07 award year, OSAC expects to see some increases in persistence rates. Targets for 2006 and 2007 were set prior to the expansion of the program and were based on the average of rates for 2002 through 2005. Based on revised persistence rates for 2002 through 2005 and the rate reported for 2006, a target of 70.0% for 2008 is reasonable. The first year that will reflect program expansions from 2005-07 funding increases will be 2009; a higher target of 71% would be reasonable for this first year at new levels.

**3. HOW WE ARE DOING**

Even with revised actual persistence rates that are several percentage points lower than rates initially reported, the rates are not significantly lower than the original targets. Because of recent funding increases, trends may not yet be apparent. What is known, however, is that persistence rates of grant recipients are significantly higher than those of eligible nonrecipients. Moreover, persistence rates of grant recipients are higher than overall retention rates for 4-year postsecondary institutions in Oregon (see below).

**4. HOW WE COMPARE**

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

**5. FACTORS AFFECTING RESULTS**

It will be three more years before trends attributable to program changes made in 2005-07 are clear. Delayed results of program changes are due to several factors: data are not available until after the end of an academic year; reported rates are based on student behavior over 4 years; and external factors such as tuition increases, availability of other forms of aid (especially Pell Grants) and changes in Oregon's economy may affect decisions about going to college.

**6. WHAT NEEDS TO BE DONE**

OSAC developed this KPM in response to a budget note from the 2003 Legislatively Approved Budget that instructed the Commission, in part, "to develop additional measures to identify the impact of the Opportunity Grant on recipients' ability to complete degree programs." The first year of a significant program expansion just ended, so it is too early to be able to determine the true effects of increased program funding and program expansion to all eligible full-time and part-time students.

**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 NAME: Oregon Student Assistance Commission**

**II. KEY MEASURE ANALYSIS**

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

KPM #9	COMPLETION RATES FOR OOG RECIPIENTS AT 4-YEAR INSTITUTIONS Completion rates (graduated within 6 years) for students at 4-year institutions who are eligible and awarded an OOG vs. eligible nonrecipients.	Measure since: New
<b>Goal</b>	Goal 1: Increase college attendance and completion in Oregon	
<b>Oregon Context</b>	Oregon Benchmarks #24, #25, #26	
<b>Data source</b>	OSAC database; National Student Clearinghouse	
<b>Owner</b>	Oregon Opportunity Grant Program, Susan Degen, Administrator, (541) 687-7451	

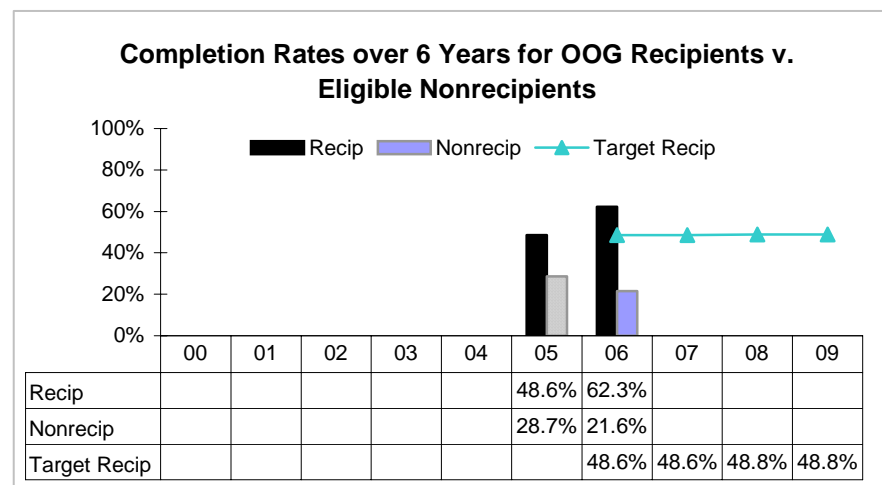
**1. OUR STRATEGY**

For each academic year, OSAC identifies a cohort group of first-year, first-time Opportunity Grant recipients and, if possible, a similar group of eligible nonrecipients. “Eligible nonrecipients,” or “late-filers,” refers to students who would have been eligible to receive an Opportunity Grant if sufficient funding had been available to serve all students for that particular academic year. In years when funding was limited, OSAC has used cutoff dates, based on institutional type, as the primary cost-control mechanism. Cutoff dates were based on application filing rates, by institutional segment, during award processing each year.

OSAC uses an in-house database to randomly select a representative sample of approximately 500 student records from recipient and nonrecipient groups for each institutional segment and conduct a completion match with the National Student Clearinghouse at a cost of \$.25 per record.

By federal definition, students enrolled full time meet satisfactory academic progress if they complete their undergraduate program of study within 150 percent of the program’s published length (i.e., complete a 4-year program within 6 years). The most recent cohort group for whom data are available is first-year students from 2001-02 who completed their programs by 2006-07.

In 2006-07, funds were available to serve all eligible full-time and part-time students, so there will be no group of late-filing eligible nonrecipients to compare the cohort group against in future years. Increased funding and implementation of the Shared Responsibility Model for determining OOG award amounts, starting in 2008-09, may also affect completion rates as students from higher-income groups become eligible for OOG funds for the first time. OSAC will modify future targets if this change in funding indicates new trends. Data for KPMs are compiled after the end of the academic year, usually in August. Over time, this will provide an indicator of the effectiveness of Opportunity Grants for students enrolled at 4-year institutions.



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

**2. ABOUT THE TARGETS**

Targets are only for grant recipients; no targets will be set for late-filing eligible nonrecipients. The higher the percentage, the more grant recipients are successfully completing their programs of study within 6 years. The original data on which the targets were based were collected during the 2005 legislative session.

Six Oregon postsecondary institutions do not report to the Clearinghouse, including two of the 40 institutions that participate in the Opportunity Grant Program—Oregon Health and Sciences University and Marylhurst University—each of which enrolls only a small number of grant recipients. Since nearly all Oregon postsecondary institutions, and most other institutions throughout the country report to the Clearinghouse, conducting data matches with the Clearinghouse provides OSAC with the most comprehensive information available to date on student completions.

**3. HOW WE ARE DOING**

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

**4. HOW WE COMPARE**

Institutions that participate in the Oregon Opportunity Grant Program also participate in federal Title IV student financial aid programs. Federal regulations require Title IV institutions to report data, including retention rates, annually to the U.S. Department of Education's Integrated Postsecondary Education Data System (IPEDS). IPEDS publishes graduation rates for all participating institutions on its College Navigator website (formerly the IPEDS COOL website).

For 4-year institutions, IPEDS defines a graduation rate as the percentage of students in a given entering cohort (group) who graduated within a specified period of time — 6 years for students enrolled full-time at 4-year institutions. The average of the most recent available completion rates for Oregon 4-year institutions is for the 2000-01 cohort (graduated by 2005-06). Completion rates for all Oregon 4-year institutions averaged 62.3%. Using only data from the Oregon University System, the average completion rates for Opportunity Grant recipients from public 4-year institutions is a somewhat lower 61.1%. Limiting information on completion rates to 4-year public Oregon institutions omits those students who complete their programs after transferring to schools in another state or to a 4-year private independent institution in Oregon. It is for this reason that OSAC conducts matches with the National Student Clearinghouse rather than with OUS or individual institutions. .

**5. FACTORS AFFECTING RESULTS**

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

**AGENCY NAME: Oregon Student Assistance Commission**

**II. KEY MEASURE ANALYSIS**

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

**6. WHAT NEEDS TO BE DONE**

Currently the Opportunity Grant makes up the equivalent of approximately 11% of a student's average cost of attendance for the previous academic year. The award is available only to low-income students. For example, the income limit for a dependent student in a family of 4 is less than \$32,000, and the limit for a single independent student is less than \$9,500. Some research has suggested that award amounts of approximately 15% to 20% of a student's cost may have a more positive effect on an individual student's ability to complete his/her program of study, particularly for this low-income student population. Opportunity Grant awards are only available for the equivalent of 4 years (8 semesters or 12 quarters) of full-time enrollment.

An increase in award amounts and/or in the number of academic terms for which the award is available would help more grant recipients complete their programs on time. Increased program funding for 2007-09 and implementation of a completely new process for determining award amounts for all students in 2008-09 will have major, unknown impacts on this KPM. Maximum award amounts will increase for most low-income students. Increased funding will also make awards available to some middle-income students for the first time, but OSAC has no data on this cohort group yet. Research has shown that students in higher income groups tend to have higher completion rates, so OSAC anticipates increases in actual data and possible increases in targets.

**7. ABOUT THE DATA**

The reporting cycle for this data is the Oregon fiscal year, which is the same as the academic year (July to June). Institutions have up to 60 days after the end of a student's period of enrollment or the end of the academic year to report to the US Department of Education. However, since some postsecondary institutions in Oregon are on a semester system and others are on a quarter system, data are not available from all institutions in time to compile completions data for the current year's Annual Progress Report.

**AGENCY NAME: Oregon Student Assistance Commission**

**II. KEY MEASURE ANALYSIS**

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

KPM #10	COMPLETION RATES FOR OOG RECIPIENTS AT COMMUNITY COLLEGES Completion rates (graduated within 3 years) for Opportunity Grant recipients at community colleges who are eligible and awarded vs. eligible nonrecipients	Measure since: New
<b>Goal</b>	Goal 1: Increase college attendance and completion in Oregon	
<b>Oregon Context</b>	Oregon Benchmarks #24, #25, #26	
<b>Data source</b>	National Student Clearinghouse	
<b>Owner</b>	Oregon Opportunity Grant Program, Susan Degen, Administrator, (541) 687-7451	

**1. OUR STRATEGY**

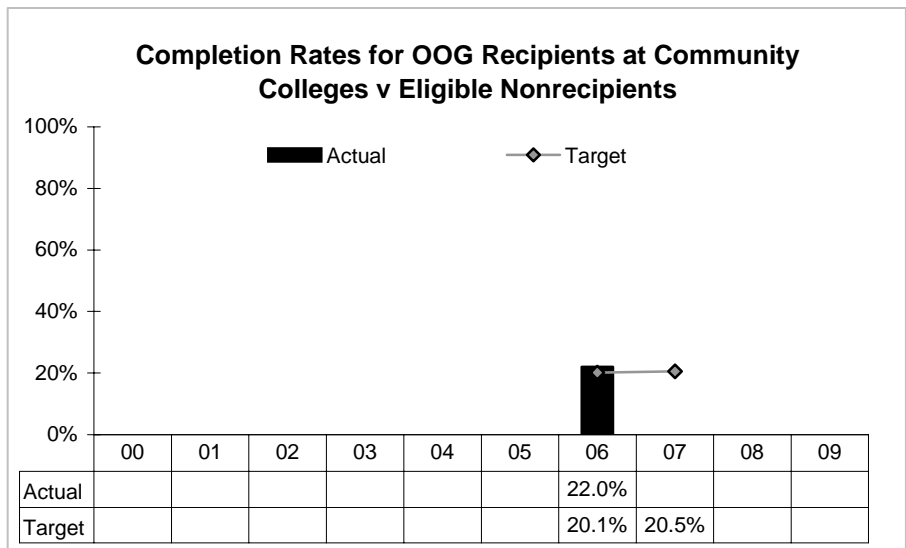
The data collection strategy for this KPM is similar to KPM #9, which measures completion rates for students at four-year institutions. For each academic year, OSAC identifies a cohort group of first-year, first-time Opportunity Grant recipients and, if possible, a similar group of eligible nonrecipients. “Eligible nonrecipients,” or “late filers,” are students who would have been eligible to receive an Opportunity Grant if sufficient funding had been available to serve all students for that particular academic year. In years when funding was limited, OSAC has used cutoff dates, based on institutional type, as the primary mechanism. Cutoff dates could not be published because they were based on application filing rates, by institutional segment, during award processing each year.

OSAC uses an in-house database to randomly select a representative sample of approximately 500 student records of recipient and nonrecipient groups and conduct a completion match with the National Student Clearinghouse at a cost of \$.25 per record.

By federal definition, students enrolled full time meet satisfactory academic progress if they complete their undergraduate program of study within 150 percent of the program’s published length (i.e., complete a 2-year program within 3 years).

For students attending community colleges, the Commission calculates a 3-year completion rate for both OOG recipients and late-filers. Data-matches are conducted with the National Student Clearinghouse after three years and again after six years. OSAC will track 3-year completion rate data and will report 6-year completion rate data for the performance measure. Using matches with the National Student Clearinghouse allows OSAC to collect completion data for those community college students who transfer to 4-year Oregon institutions as well as other out-of-state institutions.

Actual data for 2006 reflects the 3-year completion rate for the cohort group of first year students, both OOG recipients and late-filers, from the 2000-01 academic year who completed their program of study by the end of 2005-06.



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Within several years there will be no late-filers to measure against. In 2005-06, funds were available to all eligible full-time community college students. In 2006-07, program funding was expanded to serve all eligible full-time and part-time students. Increased funding and implementation of the Shared Responsibility Model for determining OOG award amounts, starting in 2008-09, may also affect completion rates as students from higher-income groups become eligible for OOG funds for the first time. OSAC will modify future targets if this change in funding indicates new trends. Data for KPMs are compiled after the end of the academic year, usually in August. Over time, this will provide an indicator of the effectiveness of Opportunity Grants for students enrolled at 2-year institutions.

**2. ABOUT THE TARGETS**

Targets are only for grant recipients; targets are not appropriate for nonrecipients. The higher the percentage, the more grant recipients are successfully completing their programs of study within 3 years. The original data on which the targets were based were collected during the 2005 legislative session. For the 2005 measure, OSAC tested a different process for comparing data from both the OUS database and the National Student Clearinghouse. Collecting completion data from OUS resulted in limited information that had to be matched again with the Clearinghouse. For 2006, OSAC returned to the previous strategy of comparing data from its internal database with the Clearinghouse.

Six Oregon postsecondary institutions do not report to the Clearinghouse, including two of the 40 institutions that participate in the Opportunity Grant Program—Oregon Health and Sciences University and Marylhurst University—each of which enrolls only a small number of grant recipients. Since nearly all Oregon postsecondary institutions, and most other institutions throughout the country report to the Clearinghouse, conducting data matches with the Clearinghouse provides OSAC with the most comprehensive information available to date on student completions.

**3. HOW WE ARE DOING**

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

**4. HOW WE COMPARE**

OSAC is one of only a few state agencies across the country that compile and report on performance measures for state-funded need-based student financial aid programs. It may be possible to compare completion rates for OOG recipients with completion rates that Oregon community colleges report to IPEDS.

**5. FACTORS AFFECTING RESULTS**

OOG recipients at the community college level include students in one-year certificate programs, most of whom do not go on to complete 2-year Associate degrees; students in 2-year Associate Degree programs; and students who transfer to 4-year programs, sometimes earning a formal transfer degree, sometimes not. Some students who transfer to 4-year programs do not complete 2 years at a community college. Community college students are more likely to be older, independent, working adults; they are also more likely to enroll part time; to attend less than a full academic year; and to need additional time to complete their programs. For this reason, a reasonably accurate picture of academic success for OOG recipients enrolled in community colleges should allow up to six years for a student.

Taken together with persistence rates, completion rates indicate the potential for academic success of Opportunity Grant recipients compared to their peers. This KPM does not, however, show the direct effect of the Opportunity Grant on completion rates of grant recipients because there 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), ease or difficulty of credit transfer, and so on. The OOG is just one element of many in providing access to community colleges.

**6. WHAT NEEDS TO BE DONE**

Currently the Opportunity Grant makes up the equivalent of approximately 11% of a student's average cost of attendance for the previous academic year. The award is available only to low-income students. For example, the income limit for a dependent student in a family of 4 is less than \$34,000, and the limit for a

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single independent student is \$9,600. Some research has suggested that award amounts of approximately 15% to 20% of a student's cost may have a more positive effect on an individual student's ability to complete his/her program of study, particularly for this low-income student population. Opportunity Grant awards are only available for the equivalent of 4 years (8 semesters or 12 quarters) of full-time enrollment.

An increase in award amounts and/or in the number of academic terms for which the award is available would help more of grant recipients complete their programs on time. Increased program funding for 2007-09 and implementation of a completely new process for determining award amounts for all students in 2008-09 will have major, unknown impacts on this KPM. Maximum award amounts will increase for most low-income students. Increased funding will also make awards available to some middle-income students for the first time, but OSAC has no data on this cohort group yet. Research has shown that students in higher income groups tend to have higher completion rates, so we anticipate increases in actual data and possible increases in targets.

**7. ABOUT THE DATA**

The reporting cycle for this data is the Oregon fiscal year, which is the same as the academic year (July to June). Institutions have up to 60 days after the end of a student's period of enrollment or the end of the academic year to report to the US Department of Education. However, since some postsecondary institutions in Oregon are on a semester system and others are on a quarter system, data are not available from all institutions in time to compile completions data for the current year's Annual Progress Report.

**AGENCY NAME: Oregon Student Assistance Commission**

**II. KEY MEASURE ANALYSIS**

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KPM #11	CUSTOMER SERVICE	Measure since: New
	Percent of customers rating their satisfaction with the agency’s customer service as “good” or “excellent”: overall service, timeliness, accuracy, helpfulness, expertise, availability of information.	
<b>Goal</b>	Goal 1: Increase college attendance and completion in Oregon	
<b>Oregon Context</b>	Oregon Benchmarks #24, #25, #26	
<b>Data source</b>	Compile data from customer surveys, by program.	
<b>Owner</b>	Administration, Executive Director, Dennis Johnson (541) 687-7377	

**1. OUR STRATEGY**

FAQs published by the Progress Board on May 24, 2006, specify the required reporting format for the Customer Service KPM. The Commission replaced old KPMs #11 and #13 to #18 with revised KPM #11, which complies with the specified format.

**2. ABOUT THE TARGETS**

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

**3. HOW WE ARE DOING**

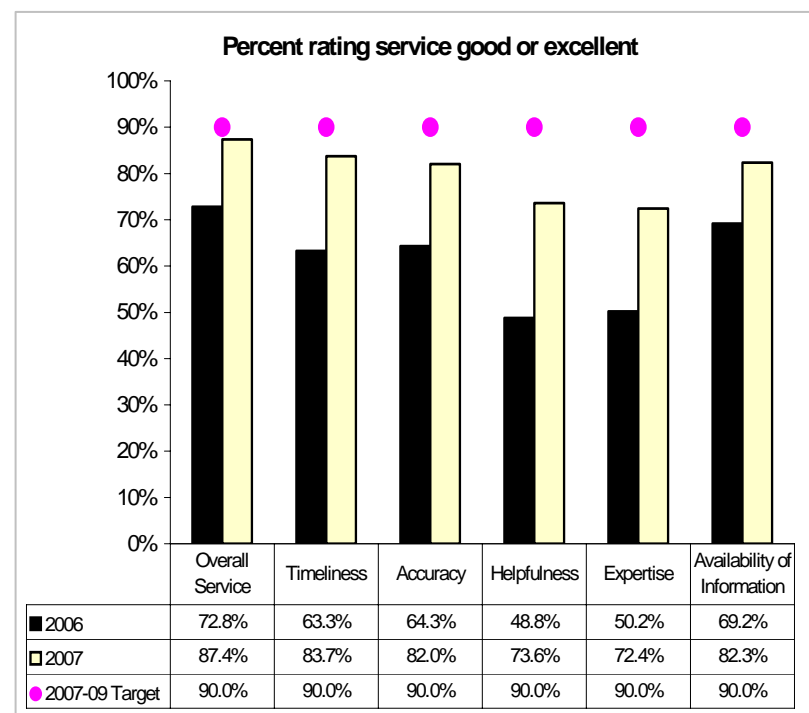
For 2007 (2006-07), 87.4% of OSAC’s customers rated their customer satisfaction experience at “Good” or “Excellent.” This is only the second year that OSAC has gathered data on customer satisfaction. .

**4. HOW WE COMPARE**

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

**5. FACTORS AFFECTING RESULTS**

OSAC’s overall service rating was 87.4% for 2007, a significant improvement over the 2006 overall rating of 72.2%. Each group surveyed interacts differently with OSAC staff members. The highest ratings came from staff members in Financial Aid Offices across Oregon, ASPIRE-AmeriCorps members, and ASPIRE site supervisors – groups who interact directly and frequently with OSAC staff. For this group, “don’t know” responses ranged from .1% to 7.9%. Overall ratings of 75% to 82% came from Scholarship Selection Committees, scholarship applicants, and Opportunity Grant recipients. These groups are very familiar with some OSAC services, but their overall knowledge of all OSAC services is limited. This was reflected in the groups’ average “don’t know” responses, which ranged from 17.1% to 20.6%. Scholarship Applicants who apply online are offered the option of completing a survey after they have completed their online application.



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Although OSAC compiled surveys of ASPIRE mentors and students, they were excluded from the overall survey report for 2007 because these groups have so little direct interaction with OSAC staff. Average “don’t know” responses from this group ranged from 36.1% to 37.5%

**6. WHAT NEEDS TO BE DONE**

Survey data from 2006 showed the need for more OSAC outreach and public relations. For 2007, OSAC incorporated more information about its programs and services in publications distributed to Oregon high school students. OSAC will add a new donor relations and marketing position for the 2007-09 biennium to improve outreach efforts—the first addition since losing 75% of agency staff in 2005. Although each group surveyed comes into contact with OSAC, the majority of students receiving financial aid have to dig deeply to understand where their Oregon Opportunity Grant money is coming from. To change this, OSAC will begin notifying students by email of their potential eligibility for Opportunity Grants starting in January 2008, when processing of federal applications for the 2008-09 academic year begins. The federal applications are also used to determine students’ eligibility for Oregon Opportunity Grants.

ASPIRE promotes other OSAC programs by including “A Program of the Oregon Student Assistance Commission” on all its publications and in its presentations to volunteers, students, and school staff. The current OSAC scholarship application has a full page devoted to OSAC programs. The OSAC webpage targeting students at [www.GetCollegeFunds.org](http://www.GetCollegeFunds.org) now has quick links to every OSAC program.

The two categories in which OSAC scored lower responses were “Helpfulness” and “Expertise.” This was particularly the case if respondents were unlikely to interact directly with OSAC staff members.

**7. ABOUT THE DATA**

Surveys were based on the 2006-07 school-year cycle (September – June). The following groups were surveyed: scholarship selection committees (clients); students who completed online scholarship applications (consumers); recipients of Oregon Opportunity Grant (consumers); ASPIRE-AmeriCorps members (constituents); ASPIRE site supervisors (constituents); and Financial Aid Officers (constituents). The customer service survey was included as a popup option after a student had completed an online scholarship application (E-App). It is also an option on OSAC’s website for students [www.GetCollegeFunds.org](http://www.GetCollegeFunds.org). No specific cutoff dates are associated with any of the surveys. Strengths include a large group of respondents, representation from OSAC’s major customer groups, and the ability to use both paper and electronic versions of the survey. Weaknesses of the data include not surveying all possible OSAC partners/customer bases, combining all the data into one total (the actual survey was broken into 9 questions), and not being able to explain the purpose of the survey to some customer groups who were asked to complete it.

Scholarship Selection Committees	
1. Survey Name	OSAC Customer Service Survey
2. Surveyor	Scholarship Services support staff
3. Date Conducted	August 2007
4. Population	Clients - Scholarship selection committee
5. Sampling frame (location)	Email Survey
6. Sampling procedure:	Census
7. Sample characteristics:	# Selection committee members surveyed = 235, # responses = 58, % response rate = 24.7%
8. Weighting:	None

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<b>eApp Filers</b>	
1. Survey Name	OSAC Customer Service Survey
2. Surveyor	Blind online survey
3. Date Conducted	Conducted between 12/05-3/06
4. Population	Consumers - E-App filers
5. Sampling frame (location)	Automatic popup option after student completed online application form
6. Sampling procedure:	Anyone filing an app was offered the opportunity to complete survey
7. Sample characteristics:	# E-App filers surveyed = 7,276, # responses = 956, % response rate = 12.8%
8. Weighting:	None
<b>Opportunity Grant Recipients</b>	
1. Survey Name	OSAC Customer Service Survey
2. Surveyor	Scholarship Services support staff
3. Date Conducted	August 2007
4. Population	Student Grant Recipients
5. Sampling frame (location)	Email Survey
6. Sampling procedure:	Random Sample of students from the cohort years 2002-2003
7. Sample characteristics:	# Students surveyed = 1655, # responses = 553, % response rate = 33.4%
8. Weighting:	None

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<b>Financial Aid Directors and Officers</b>	
1. Survey Name	OSAC Customer Service Survey
2. Surveyor	Opportunity Grant Administrator
3. Date Conducted	May 2007
4. Population	Financial Aid Officers and Directors
5. Sampling frame (location)	Email Survey
6. Sampling procedure:	100% of population
7. Sample characteristics:	# Officers and Directors surveyed=97, # responses = 38, % response rate = 39.2%
8. Weighting:	None
<b>ASPIRE AmeriCorps Members</b>	
1. Survey Name	OSAC Customer Service Survey
2. Surveyor	Blind online survey
3. Date Conducted	2007
4. Population	Consumers - E-App filers
5. Sampling frame (location)	Automatic popup option after student completed online application form
6. Sampling procedure:	Every AmeriCorps member given opportunity to complete survey
7. Sample characteristics:	# AmeriCorps members surveyed = 28, # responses = 24, % response rate = 85.7%
8. Weighting:	None
<b>ASPIRE Site Supervisors</b>	
1. Survey Name	OSAC Customer Service Survey
2. Surveyor	ASPIRE staff
3. Date Conducted	May - June 2006
4. Population	Site supervisors
5. Sampling frame (location)	Paper or automatic popup after Adult Mentors filled out their ASPIRE evaluations
6. Sampling procedure:	Systematic sample
7. Sample characteristics:	# ASPIRE mentors surveyed = 951, # responses = 34, % response rate = 18.8%
8. Weighting:	None

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<b>ASPIRE Adult Mentors</b>	
1. Survey Name	OSAC Customer Service Survey
2. Surveyor	ASPIRE staff
3. Date Conducted	May - June 2007
4. Population	Adult ASPIRE mentors (Volunteers)
5. Sampling frame (location)	Automatic popup after Adult Mentors filled out their ASPIRE evaluations
6. Sampling procedure:	Systematic sample
7. Sample characteristics:	# ASPIRE mentors surveyed = 926, # responses = 85, % response rate = 9.2%
8. Weighting:	None
<b>ASPIRE Students</b>	
1. Survey Name	OSAC Customer Service Survey
2. Surveyor	ASPIRE staff, AmeriCorps members, ASPIRE Site Supervisors
3. Date Conducted	May - June 2007
4. Population	Consumers - high school student ASPIRE participants
5. Sampling frame (location)	Paper or automatic popup after ASPIRE students filled out their ASPIRE evaluations
6. Sampling procedure:	Systematic sample
7. Sample characteristics:	# ASPIRE students surveyed = 4100, # responses = 413, % response rate = 10.1%
8. Weighting:	None

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<b>KPM #12</b>	<b>PERCENTAGE OF STUDENTS OF COLOR SERVED BY OSAC PROGRAMS</b> Percentage of students of color served by OSAC programs (i.e., disaggregate measures to track race/ethnicity of beneficiaries of OSAC program services)	<b>Measure since: 2005</b>
<b>Goal</b>	Goal 1: Increase college attendance and completion in Oregon	
<b>Oregon Context</b>	Oregon Benchmarks #24, #25, #26	
<b>Data source</b>	Varies by program: Scholarship Services applications; Oregon Opportunity Grant datamatches with institutions & segments	
<b>Owner</b>	Varies by program	

**1. OUR STRATEGY**

The Commission collects race/ethnicity (R/E) data about scholarship and grant applicants from internal and external sources and reports R/E totals for OSAC’s two main programs – Scholarship Services and the Oregon Opportunity Grant. The four R/E codes correspond to four traditionally recognized ethnic groups: African American (AfrAm), Native American/Alaska Native (NatAm), Asian/Pacific Islander (Asia/Pac), and Hispanic.

The Free Application for Federal Student Aid (FAFSA), which serves as the application for both federal student aid programs and the Oregon Opportunity Grant, does not collect R/E data. However, postsecondary institutions that participate in federal Title IV programs are required to report summary-level data about their students’ race/ethnicity to the Integrated Postsecondary Education Data System (IPEDS). A student’s race/ethnicity is a self-reported, optional data element that institutions collect during matriculation and then transfer summaries to IPEDS.

For Opportunity Grants, OSAC conducts data-matches to collect R/E data from the Oregon University System (OUS), the Community College and Workforce Development division (CCWD) of the Oregon Department of Education, and individual private independent 4-year institutions, as reporting schedules permit after the end of the academic year in July/August. For Scholarship Services (SchSrv), OSAC collects R/E data from the 7,000+ students who complete the OSAC combined scholarship application for the 370 scholarship programs it administers. Data for this KPM are compiled after the end of the academic year, usually in August.

This measure was developed in response to a Budget Note from OSAC’s 2003 Legislatively Approved Budget, which instructed the Commission to “to disaggregate measures that track services to students by race and ethnicity, with a special emphasis on agency program services to Latino students.”

<b>Overall</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>
<b>Afr-Am</b>	NA	NA	NA	NA	NA	NA	4.0%	5.0%		
<b>Nat-Am</b>	NA	NA	NA	NA	NA	NA	2.9%	3.4%		
<b>Asia/Pac</b>	NA	NA	NA	NA	NA	NA	5.0%	5.8%		
<b>Hisp</b>	NA	NA	NA	NA	NA	NA	6.0%	7.4%		
<b>Scholarship Services</b>										
<b>Afr-Am</b>	NA	NA	NA	NA	NA	NA	3.0%	3.3%		
<b>Nat-Am</b>	NA	NA	NA	NA	NA	NA	2.4%	2.4%		
<b>Asia/Pac</b>	NA	NA	NA	NA	NA	NA	4.7%	7.2%		
<b>Hisp</b>	NA	NA	NA	NA	NA	NA	4.1%	4.8%		
<b>Oregon Opportunity Grant</b>										
<b>Afr-Am</b>	3.0%	2.8%	3.1%	3.3%	4.2%	4.3%	4.5%	5.6%		
<b>Nat-Am</b>	3.1%	3.1%	2.8%	3.0%	3.2%	3.0%	3.1%	3.7%		
<b>Asia/Pac</b>	5.4%	6.3%	5.8%	5.8%	6.0%	5.9%	5.1%	5.4%		
<b>Hisp</b>	6.1%	6.0%	6.8%	7.1%	7.6%	7.8%	6.8%	8.2%		

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**2. ABOUT THE TARGETS**

Percentages of recipients in each major R/E group are collected separately for the Opportunity Grant and for Scholarship Services. Since targets are not appropriate for this KPM, OSAC retains and reports descriptive data annually.

**3. HOW WE ARE DOING**

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

**4. HOW WE COMPARE**

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

**5. FACTORS AFFECTING RESULTS**

The Oregon Student Assistance Commission increased outreach efforts throughout the state starting in 2005-06 by hiring regional scholarship consultants to present workshops on OSAC grants and scholarships at college fairs and college campuses. The ASPIRE program increased from 74 to 82 high schools, reaching more students with information and individual mentoring.

**6. WHAT NEEDS TO BE DONE**

Continued outreach efforts to Oregonians about OSAC-administered grants and scholarships and about financial aid information in general. These efforts should consider social marketing strategies to reach students of color and other underserved groups. In January 2007, the first College Goal Sunday (CGS) program took place on 15 campuses statewide to help students and their families file the Free Application for Federal Student Aid (also used as the application for the Oregon Opportunity Grant) and the OSAC scholarship application. Marketing for this event includes a number of social marketing strategies to reach underserved students including the following:

- Utilize social networks to reach students and their families. Each CGS regional committee will identify the target audience within the student's populations in their geographic area.
- Engage the Oregon Association of Financial Aid Administrators to bring CGS materials to high schools throughout the state and identify social networks.
- Utilize the Oregon Indian Postsecondary Education Coalition and the Oregon Council for Hispanic Advancement to distribute CGS materials to Native American and Latino students throughout the state and as social network participants.
- Locate additional Hispanic and African American networks in each geographic region as indicated.
- Engage education groups who work with students such as Confederation of School Administrators and Oregon School Counselor Association.

OSAC will continue to support and promote College Goal Oregon activities planned for 2008 and beyond. OSAC provides information to high school counselors in cooperation with the Oregon University System, and OSAC staff members participate in several college fairs and similar events throughout the year.

OSAC partners with the Education Credit Management Corporation to provide a set of *Opportunities* Booklets and OSAC scholarship applications (including information on the Oregon Opportunity Grant) to students and families statewide, also offering these booklets in Spanish. In 2007, OSAC received a grant from ECMC to implement the Oregon College Access Network. OrCAN is a statewide hub for data and information, connecting people and organizations, sharing

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knowledge and resources, providing professional development and networking opportunities, and educating key leaders and policy makers about supporting access to education beyond high school.

**7. ABOUT THE DATA**

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

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**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: Susan Degen	Phone: 541-687-7451
Alternate: Vicki Merkel	Phone: 541-687-7385

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

<p><b>1 INCLUSIVITY</b> Describe the involvement of the following groups in the development of the agency’s performance measures.</p>	<ul style="list-style-type: none"> <li>• Staff: OSAC’s performance measures relating to operational goals were developed with directors, managers, program administrators, and other key staff. Program goals were developed with OSAC’s seven Commissioners, who are Governor-appointed community volunteers.</li> <li>• Elected Officials: Only two of OSAC’s existing KPMs (#1 and #2) existed in their current form prior to the 2005 Legislative Assembly. All other KPMs were modified or added in 2005, including three new KPMs for ODA and four new KPMs for the Oregon Opportunity Grant (OOG). Two previous KPMs for the OOG were removed . At its July 2006 meeting, the Joint Legislative Audit Committee asked OSAC to develop a fifth KPM for the OOG that tracks completion rates for part-time students who receive the grant.</li> <li>• Stakeholders: OSAC collects data for KPMs related to the Opportunity Grant by conducting data-matches with a number of partners, including the Oregon University System, the Department of Education’s Division for Community Colleges and Workforce Development, and Oregon’s independent colleges and universities.</li> <li>• Citizens: Staff presents KPM data and reports to OSAC’s board of commissioners.</li> </ul>
<p><b>2 MANAGING FOR RESULTS</b> How are performance measures used for management of the agency? What changes have been made in the past year?</p>	<p>Operational measures are used to determine progress toward achieving higher levels of effectiveness and efficiencies in administering agency-related programs. Program goals assist the Commissioners in measuring and communicating agency goals that relate to Oregon Benchmarks and in the development of the agency’s budget. Nearly all measures are based on data collected after the close of the academic year, which coincides with the state’s fiscal year. OSAC uses measures to determine ways to improve services to the students it serves.</p>
<p><b>3 STAFF TRAINING</b> What training has staff had in the past year on the practical value and use of performance measures?</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>

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<p>4 COMMUNICATING RESULTS How does the agency communicate performance results to each of the following audiences and for what purpose?</p>	<ul style="list-style-type: none"><li>• Staff: Key staff members participate in data collection and analysis during the development process for KPMs related to their programs. All staff have access to final versions of KPM documents, which are posted on the agency website.</li><li>• Elected Officials: The Executive Director discussed the agency's KPMs in presentations to various legislative committees during the 2005 and 2007 Legislative sessions. Staff has presented proposed strategies for new KPMs for approval by the Joint Legislative Audit Committee.</li><li>• Stakeholders: OSAC conducts data-matches with several partners to collect performance measure data. KPMs are posted on the agency website: <a href="http://www.osac.state.or.us/performance.html">www.osac.state.or.us/performance.html</a>. OSAC shares KPMs at public hearings during the budget development process and seeks input from the public regarding the measures and the results.</li><li>• Citizens: Performance measures are posted in the agency website: <a href="http://www.osac.state.or.us/performance.html">www.osac.state.or.us/performance.html</a>.</li></ul>
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