

**STUDENT ACCESS COMMISSION, OREGON**

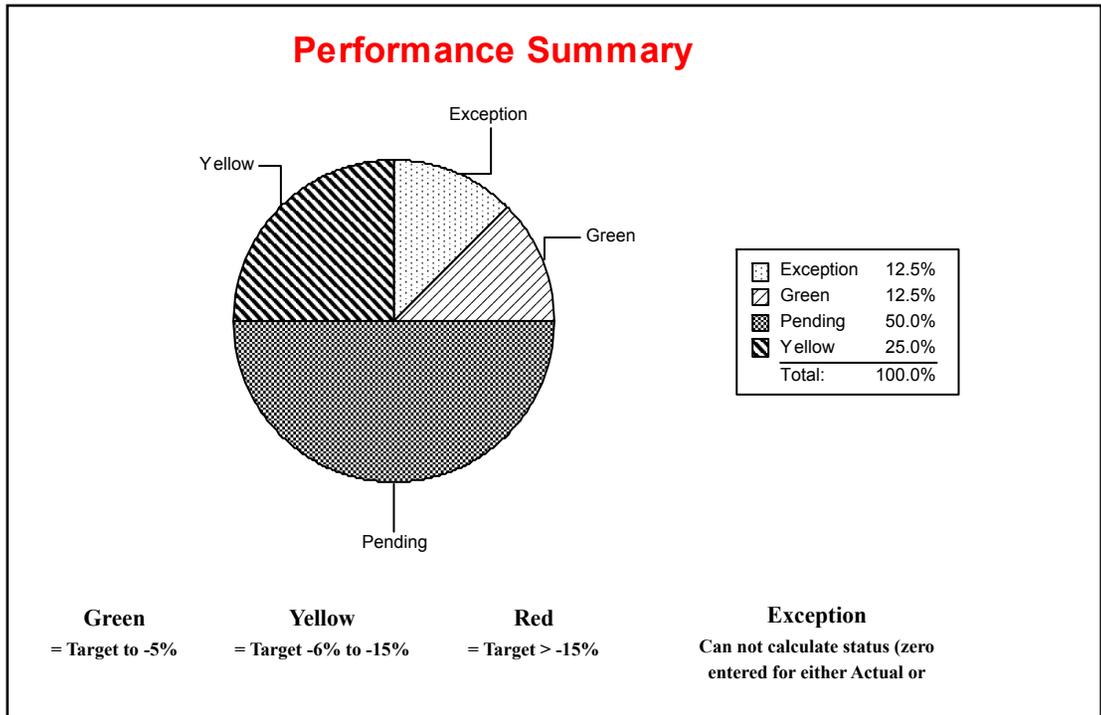
**Annual Performance Progress Report (APPR) for Fiscal Year (2012-2013)**

Original Submission Date: 2013

Finalize Date:

2012-2013 KPM #	2012-2013 Approved Key Performance Measures (KPMs)
	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.
	Determine the college-going culture of ASPIRE students by measuring the percentage of graduating senior ASPIRE participants who enroll in college.
	Effective and timely communications with OOG awardees.
	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.
3	Ratio of administrative dollars to private and public Scholarship dollars awarded to students.
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.

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



**1. SCOPE OF REPORT**

Agency programs and services addressed by key performance measures — Oregon Opportunity Grant, Scholarship Services, ASPIRE and Outreach.

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 modified and expanded many times over the years. The primary source of program funding is the state's General Fund, along with a small amount of funds from interest earned on the Lottery-supported Education Stability Fund and from

expired Individual Education Accounts for participants in the JOBS Plus program . Nearly 33,000 students received more than \$51.6 million in Opportunity Grants for the 2012-13 academic year.

OSAC's Scholarship Services administers 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. Students can apply for multiple scholarships with a single unified online application that is available on OSAC's website. In 2011-12, nearly 3,300 college and university students received nearly \$16 million through this array of programs.

Several agency programs and services have not been addressed by key performance measures in the past. ASPIRE (Access to Student assistance Programs in Reach of Everyone) is a mentoring program that helps middle-school and high school students access postsecondary education and training beyond high school. Students receive information about college and career options, admissions, and financial aid from trained and supportive ASPIRE volunteer-mentors. In 2012-13, ASPIRE worked in 145 sites statewide. OSAC also offers enhanced access to training for students and families at college fairs each fall and at College Goal Oregon events offered statewide in January each year . Topics include how to fill out the Free Application for Federal Student Aid (FAFSA) and how to search and apply for scholarships and financial aid.

## 2. THE OREGON CONTEXT

According to the Oregon Employment Department, 19 percent of all job openings require some postsecondary training, and 35 percent of all competitive-level job openings require a college degree (see *Employment Projections by Industry & Occupation 2010-2020*).

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.", In addition, 82 percent of Oregon jobs that have 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 showed a decline in public university 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. As of the date of this report, OUS had not published 2012-13 statistics.

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 Oregon's community colleges, public universities, private 4-year colleges and universities, OSAC continues to explore ways to expand and increase the effectiveness of the OOG program . This has been especially critical over the past decade, as college costs have continued to outpace inflation. Since 2008-09, OSAC has seen huge increases in demand for student financial aid because of the economic downturn. That demand continued unabated through 2011-12 and only in the past year appears

to have peaked. Despite high demand, program funding has 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 middle-school, high school, and community college students who want to participate.

For the 2011-13 biennium, OSAC set two goals that directly related to furthering OSAC's mission: 1) increase funding for Oregon Opportunity Grants to make grants available to more eligible students and align award amounts with ever-increasing college costs, and 2) extend participation in the ASPIRE program to all Oregon high schools and middle schools that seek to participate. OSAC has met the first of these goals: OOG funding increased modestly in 2011-13, from \$94 million to \$99 million, and will increase by another 11% to nearly \$111 million in 2013-15. As for the second goal, OSAC maintained support of all 145 existing ASPIRE sites in 2011-13 through grants from outside organizations and has received full General Fund support for all sites in 2013-15. Meeting these goals contributes 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.

### **3. PERFORMANCE SUMMARY**

For the 2013-15 biennium, OSAC proposed adding four 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. Of the 12 KPMs that were added since the end of the 2005 Legislative Session, only four of them remain. The Legislative Assembly approved four new KPMs for which OSAC will begin collecting data and determining appropriate targets. Because all KPMs approved for deletion have been removed from the Annual Performance Progress Report for 2012-13, OSAC's annual report will focus on its four existing KPMs. However, data for existing KPM #12 will not be available until September/October 2013.

### **4. CHALLENGES**

OSAC's challenges are directly related to its diverse programs and the KPMs for these programs, as noted below:

- 1) Oregon is unique in the country 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)
- 2) To collect data on student race/ethnicity, OSAC must initiate data/sharing agreements with institutional partners and third parties (at a cost per record, in some cases) and find ways to quantify data received from data exchanges. OSAC is prohibited from collecting this information directly from students due to legal restrictions or FAFSA data limitations. (KPM #12)

3) Defining OSAC's customers is challenging, given that we serve thousands of students but have little direct interaction with most of them. OSAC staff members 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)

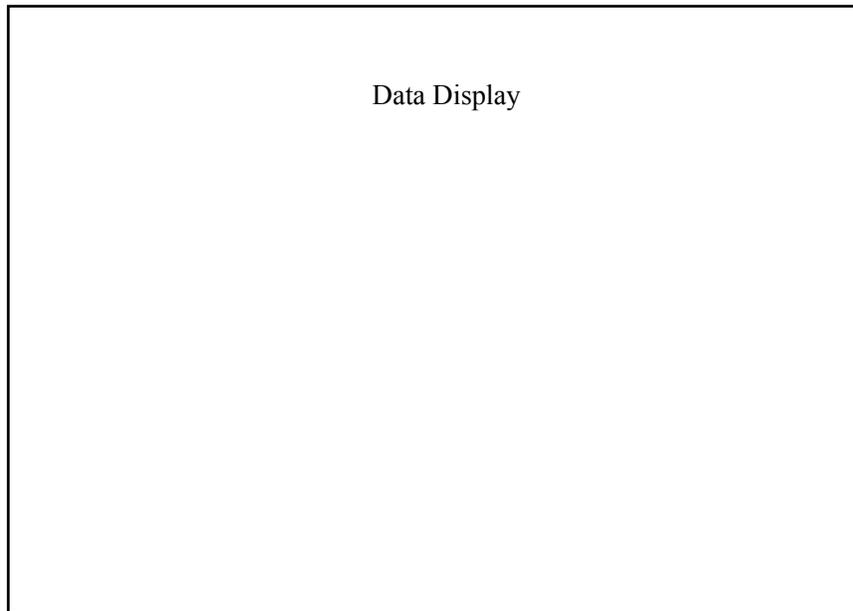
4) OSAC has four new KPMs to develop for the 2013-15 biennium. In some cases, it may not be possible to set appropriate targets until more data become available.

## **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. Scholarship dollars awarded have steadily increased over time, yet the ratio of dollars awarded to administrative expense has remained fairly constant. This indicates that OSAC has met the challenge.

<b>KPM #</b>	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.	2012
<b>Goal</b>	Goal 1: Increase college attendance and completion in Oregon	
<b>Oregon Context</b>	Oregon Benchmarks #24, #25, #26	
<b>Data Source</b>	OSAC database	
<b>Owner</b>	Susan Degen, Administrator, State Grants & Government Affairs, 541-687-7451	



**1. OUR STRATEGY**

**2. ABOUT THE TARGETS**

**3. HOW WE ARE DOING**

**4. HOW WE COMPARE**

**5. FACTORS AFFECTING RESULTS**

**6. WHAT NEEDS TO BE DONE**

**7. ABOUT THE DATA**

This is a new measure approved for 2013-15. No data are available.

<b>KPM #</b>	Determine the college-going culture of ASPIRE students by measuring the percentage of graduating senior ASPIRE participants who enroll in college.	2013
<b>Goal</b>	Goal 1: Increase college attendance and completion in Oregon	
<b>Oregon Context</b>	Oregon Benchmarks #24, #25, #26	
<b>Data Source</b>	OSAC database	
<b>Owner</b>		

Data Display

## 1. OUR STRATEGY

**2. ABOUT THE TARGETS**

**3. HOW WE ARE DOING**

**4. HOW WE COMPARE**

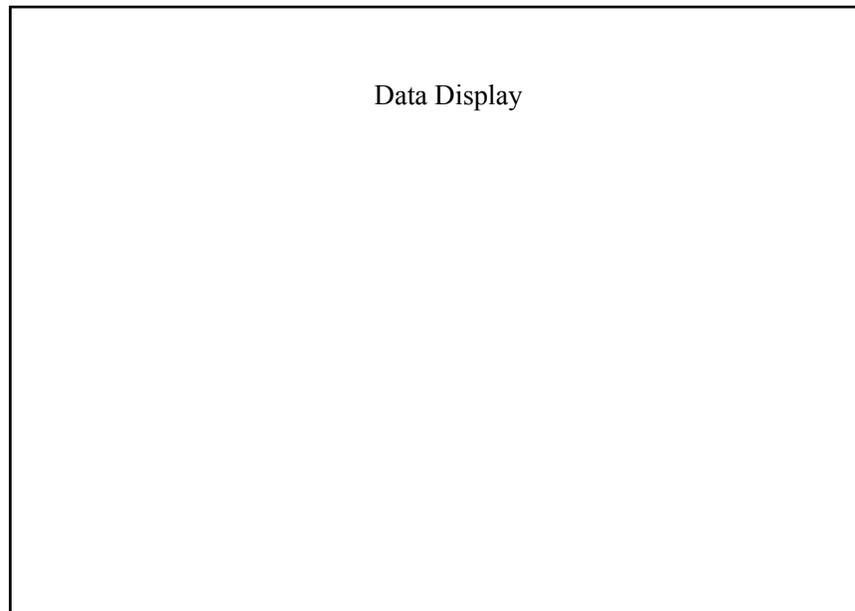
**5. FACTORS AFFECTING RESULTS**

**6. WHAT NEEDS TO BE DONE**

**7. ABOUT THE DATA**

This is a new measure approved for 2013-15. No data are available.

<b>KPM #</b>	Effective and timely communications with OOG awardees.	2013
<b>Goal</b>	Goal 1: Increase college attendance and completion in Oregon	
<b>Oregon Context</b>	Oregon Benchmarks #24, #25, #26	
<b>Data Source</b>	OSAC database	
<b>Owner</b>		



**1. OUR STRATEGY**

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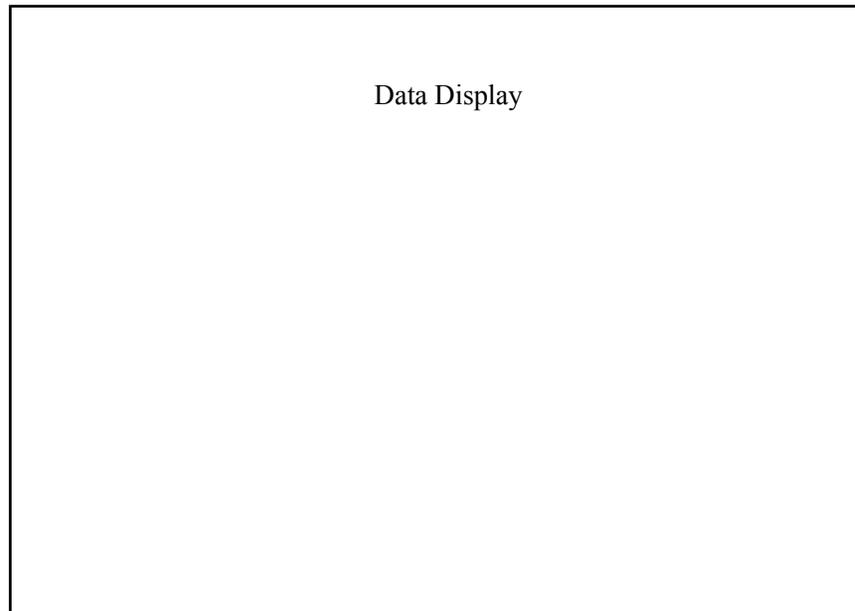
**5. FACTORS AFFECTING RESULTS**

**6. WHAT NEEDS TO BE DONE**

**7. ABOUT THE DATA**

This is a new measure approved for 2013-15. No data are available.

<b>KPM #</b>	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.	2013
<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; DHS data	
<b>Owner</b>	OSAC Intermin Executive Director Bob Brew, (541) - 687-7460	



**1. OUR STRATEGY**

**2. ABOUT THE TARGETS**

**3. HOW WE ARE DOING**

**4. HOW WE COMPARE**

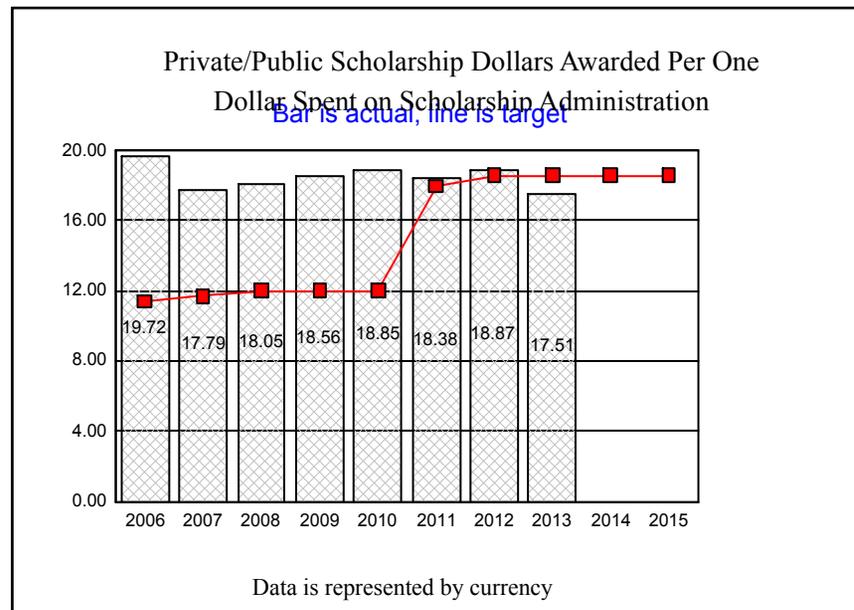
**5. FACTORS AFFECTING RESULTS**

**6. WHAT NEEDS TO BE DONE**

**7. ABOUT THE DATA**

This is a new measure approved for 2013-15. No data are available. Measurements will follow the academic year, September through June.

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



### 1. OUR STRATEGY

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

improves (i.e. decreases).

## 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 17.51 for 2012-13 academic year. Although it is lower, it is still close the range of 17.79 to 19.72 that has been reported since 2006 for this KPM.

## 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 2012-13 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. 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 transcript review.

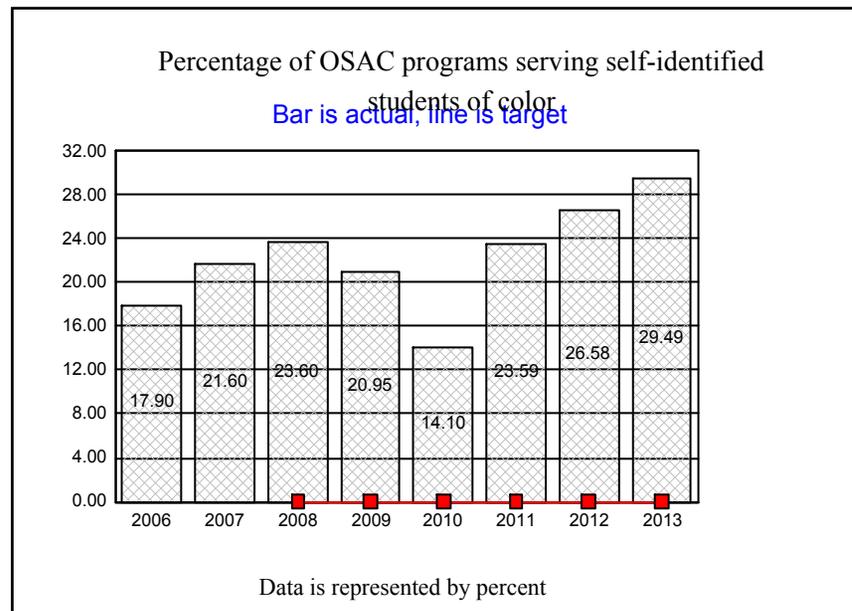
## 6. WHAT NEEDS TO BE DONE

Improved and increased electronic solutions continue to be a priority. The agency is 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 2012-13 academic year = 2013 KPM report period.

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



**1. OUR STRATEGY**

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 September and October. 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 2012-13 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 29.49% 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 2012-13, 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 not be able to make year-to-year comparisons of R/E data for several years. For 2012-13, at the time this KPM was written, the IPEDS website was shut down due to the Federal Government closure. For 2012-13, the number of total applicants who chose not to respond and those who answered "other" or "unknown" was 5.40% of respondents. This compares with 2011-12, when the total of non-respondents and those who answered "other" or "unknown" was 5.65% of all respondents. The group who chose not to respond, or answered other or unknown has gradually declined over the last three years. The total percentage of minority students increased for 2012-13, possibly because revised R/E categories may have encouraged more students to report.

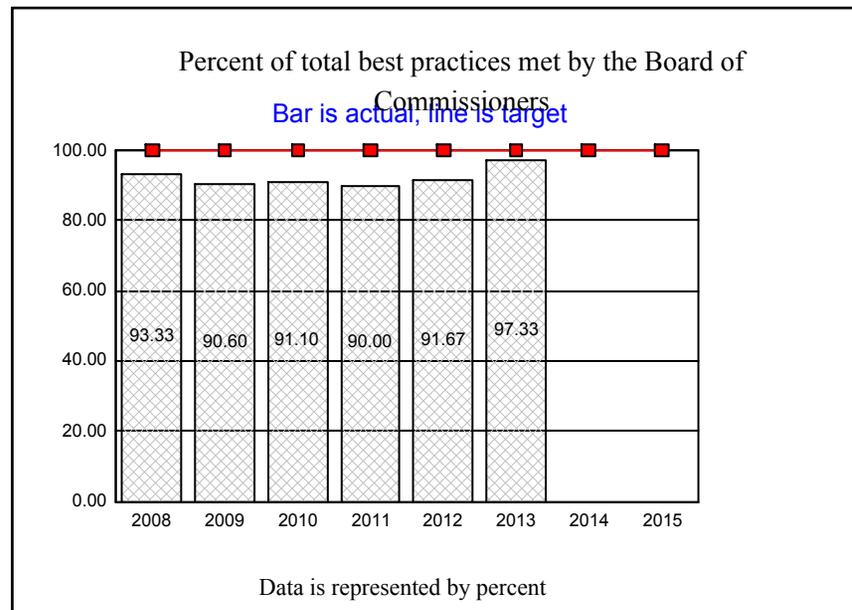
## **6. WHAT NEEDS TO BE DONE**

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.

<b>KPM #14</b>	Percent of total best practices met by the Board of Commissioners.	2008
<b>Goal</b>	Goal 1: Increase college attendance and completion in Oregon	
<b>Oregon Context</b>	Oregon Benchmarks #24, #25, #26	
<b>Data Source</b>	OSAC survey of commissioners	
<b>Owner</b>	Administration, 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 sixth 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 August 2013. Five of the seven Commissioners completed the survey. 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 six year span, the percentage of best practices met has been in a range of 90% to 97.33%. 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% 2013=97.33%**

## **4. HOW WE COMPARE**

In prior years, it has been difficult to compare against other boards and commissions due to the differences in the types of work and responsibilities each commission performs. Community College and Workforce Development was the only "education related" entity that also reports best practices. However, the scope of its responsibilities differs from OSAC's. As of July 1, 2014, neither commission will exist when the Higher Education Coordinating Commission (HECC) takes over the role of governance for the agencies.

## **5. FACTORS AFFECTING RESULTS**

The five commissioners who completed the survey answered independently given their own opinion and knowledge of the items measured in each of the 15 questions. This year's percentage of 97.33 is the highest in the six year history of measurement. Most of the commissioners have now been on the commission for multiple years and feel more comfortable with the process and the way the best practices have been incorporated into their process.

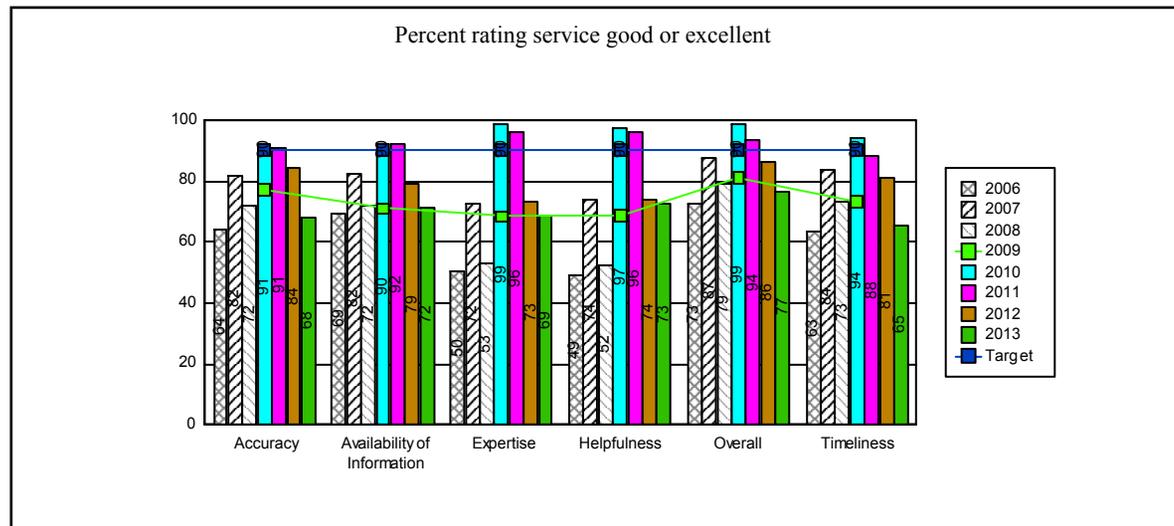
## **6. WHAT NEEDS TO BE DONE**

OSAC possibly could have reconsidered 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. However, for the current year of reporting, the percentage increased to 97.3, the highest percentage to date.

**7. ABOUT THE DATA**

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

<b>KPM #15</b>	Percent of customers rating their satisfaction with the agency’s customer service as “good” or “excellent”: overall customer service, timeliness, accuracy, helpfulness, expertise and availability of information.	2007
<b>Goal</b>	Goal 1: Increase college attendance and completion in Oregon	
<b>Oregon Context</b>	Oregon Benchmarks #24, #25, #26	
<b>Data Source</b>	Compile data from customer surveys, by program	
<b>Owner</b>	Administration, 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 is provided via e-mail, listserv messages, or a website link provided with materials pertinent to the particular user group. For the 2013 KPM, 35 Financial Aid Officers, 112 ASPIRE Site Coordinators, and 247 Scholarship Selection Committee Members (a total of 394 participants) completed the survey. This total number of survey completers is up slightly

over the 385 who completed the survey in 2012.

## 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, 76.84% of OSAC's client and constituent groups rated their overall customer satisfaction experience as "Good" or "Excellent" for 2013. This was a drop of nearly 11 % compared to the previous year's results.

## 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%; 2013: 76.8%**

**Timeliness 2006: 78.3%; 2007: 90.8%; 2008: 86.2%; 2009: 80.3%; 2010: 94.4%; 2011: 87.95%; 2012: 80.77%; 2013: 65.1%**

**Accuracy 2006: 80.5%; 2007: 89.8%; 2008: 90.4%; 2009: 86.9%; 2010: 90.9%; 2011: 91.13%; 2012: 84.41%; 2013: 67.7%**

**Helpfulness 2006: 86.0%; 2007: 87.8%; 2008: 90.9%; 2009: 89.4%; 2010: 97.4%; 2011: 96.20%; 2012: 73.89%; 2013: 72.8%**

**Expertise 2006: 88.3%; 2007: 87.6%; 2008: 92.7%; 2009: 89.6%; 2010: 98.7%; 2011: 96.09%; 2012: 73.10%; 2013: 68.5%**

**Availability of Information 2006: 81.5%; 2007: 86.1%; 2008: 85.8%; 2009: 80.3%; 2010: 90.0%; 2011: 92.28%; 2012: 78.90%; 2013: 71.5%**

For the three user groups surveyed, "don't know" responses to specific survey questions ranged from 0% to 30%. Overall, "don't know" responses represented 12.2% of total responses. The group that has the most person-to-person contact with OSAC (Financial Aid Officers) had no "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 increased less than 3% over 2012. Although middle school ASPIRE coordinators were added to the group of survey respondents, the total number for all ASPIRE coordinators was lower than in 2012. The largest increase was in the number of Scholarship Selection Committee survey responders, up from 229 in 2012 to 247 in 2013. The number of Financial Aid Office (FAO) responders increased from 32 in 2012 to 35 in 2013.

The decrease in the “overall quality of service” rating is due to a variety of factors. The increase in Scholarship Selection Committee responders is positive, but many selection committee members have no contact with OSAC outside of reviewing the scholarship applications and determining awardees. This results in a higher percentage of “don’t know” responses to several survey questions. Lack of familiarity with OSAC processes seems to directly affect how responders rate performance in both overall quality and individual categories. 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. The overall percentage of responders rating OSAC “excellent” or “good” decreased by nearly 11% -- from 86% in 2012 to 76.8% in 2013. This significant decrease may be attributed in large part to difficulties students, counselors, and scholarship advisors encountered with a new online scholarship application process that was implemented for the 2012-13 scholarship cycle.

## 6. WHAT NEEDS TO BE DONE

OSAC has used the same methodology for the past four years to collect and analyze customer service survey data. The key issue that affected the decrease in Overall Quality ratings for 2012-13 was use of a new online scholarship application that fell far short of expectations. OSAC will bring back its legacy scholarship application from 2011 for the 2014-15 scholarship application cycle that begins in November 2013. Going forward, OSAC is working with an experienced project manager to refine and redesign the “new” application, with a goal of implementing the new process in 2015.

## 7. ABOUT THE DATA

Surveys were based on the 2012-13 school year cycle (September - June). The following groups were surveyed: Scholarship Selection Committees (clients), ASPIRE site supervisors at high schools and middle schools (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, and a printable version was included in the instruction materials that they downloaded. If the committee chose not to use on-line access, a paper copy of the survey was sent with the scholarship selection packet. ASPIRE Coordinators and Financial Aid Officers received an email solicitation containing a link to an online survey. OSAC customer service statistics are calculated for each respondent group as the number of “Excellent” and “Good” responses divided by the total number of responses, excluding respondents who skip the question or respond “don’t know.” The results for each respondent group are averaged to generate an agency-wide statistic. Customer groups that indicate limited knowledge of OSAC’s programs and services (based on the percent of “don’t know,” “none,” or “a bit” responses) may be 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.

**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.
<b>3 STAFF TRAINING</b>	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.
<b>4 COMMUNICATING RESULTS</b>	<p>* <b>Staff :</b> Key staff members participate in data collection and analysis during the development process for KPMs related to their programs. All staff members have access to final versions of KPM documents, which are posted on the agency website and presented at staff meetings .</p> <p>* <b>Elected Officials:</b> 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>* <b>Stakeholders:</b> KPMs are posted on the agency website:  <a href="http://www.OregonStudentAid.gov/performance-measures.aspx">http://www.OregonStudentAid.gov/performance-measures.aspx</a>. In addition, stakeholders and citizens can attend the KPM presentation made each year to OSAC Commissioners.</p> <p>* <b>Citizens:</b> Annual Performance Progress Reports are posted on the agency website:  <a href="http://www.OregonStudentAid.gov/performance-measures.aspx">http://www.OregonStudentAid.gov/performance-measures.aspx</a>.</p>