

OFFICE OF STUDENT FINANCIAL ASSISTANCE

STRATEGIC PLAN

FY 2008-2009 THROUGH FY 2012-2013

AGENCY NUMBER: 661

DATE

Adopted: October 17, 2007
Revised September 22, 2009

OFFICE OF STUDENT FINANCIAL ASSISTANCE

VISION: Be the first choice for college access.

MISSION: To promote and provide college access.

PHILOSOPHY: Education is the door to a productive and satisfying life for the residents of Louisiana.

VALUES: Teamwork
Excellence
Service
Transparency

GOALS:

- I. To achieve and maintain the highest level of customer satisfaction.
- II. To serve as the primary state source of student financial assistance programs, services and information.
- III. To partner with the Board of Regents and the Board of Elementary and Secondary Education to maximize access to postsecondary education through state student financial assistance policies and programs.
- IV. To maintain statutory and regulatory compliance.
- V. To ethically, effectively and efficiently administer programs and services.
- VI. To augment student services and programs by maximizing federal revenues.

ADMINISTRATION AND SUPPORT SERVICES PROGRAM

MISSION: To provide direction and administrative support services for the agency and all student financial aid program participants.

GOALS:

- I. To achieve and maintain the highest standards of customer service.
- III. To serve as the primary state source of student financial assistance programs, services and information.
- III. To partner with the Board of Regents and the Board of Elementary and Secondary Education to maximize access to postsecondary education through state student financial assistance policies and programs.
- IV. To maintain statutory and regulatory compliance.
- V. To ethically, effectively and efficiently administer programs and services.
- VI. To augment student services and programs by maximizing federal revenues.

OBJECTIVE I.1: To maintain administrative costs at less than 4% of the agency’s total annual expenditures and Student Tuition Assistance and Revenue Trust (START) Saving Program deposits.

STRATEGY I.1.1 Monitor administrative costs as related to budgeted cost on a monthly basis.

STRATEGY I.1.2 Review budget submissions to ensure consistency with budget projections on a monthly basis.

STRATEGY I.1.3 Recommend and implement cost efficiency measures as appropriate.

PERFORMANCE INDICATORS

Input:	START deposits Agency administrative costs
Output:	Agency administrative costs of less than 4%
Outcome:	Minimize administrative costs and maximize funds available for programs benefiting students
Efficiency:	Ratio of Agency total annual expenditures and START deposits to Agency administrative cost

OBJECTIVE II.1: Achieve and maintain a 98% answer rate on incoming Customer Service phone calls and a 100% response rate to all other inquiries (e-mail, telephone, letters, etc.) by fiscal year 2012-2013.

STRATEGY II.1.1 Achieve an efficient balance between annual call volume responsiveness and scheduled off-site activities.

STRATEGY II.1.2 Achieve and maintain adequate staffing.

STRATEGY II.1.3 Cooperate with Information Technology Division in developing web-based sites providing information on agency programs to students, parents, schools and lenders.

STRATEGY II.1.4 Increase internal and external training for staff to increase professionalism in verbal and written communication skills and maximize employee productivity.

PERFORMANCE INDICATORS

Input:	Number of individuals staffing the phones Number of incoming phone calls Number of other inquiries
Output:	Number of phone calls answered Number of other inquiries answered
Outcome:	Percentage of calls answered Percentage of other inquiries answered
Efficiency:	Phone calls answered per individual staffer Phone answering rate of 98% Other inquiry-answering rate of 100%

OBJECTIVE II.2: To provide program information on financial aid availability and eligibility to 100% of target groups specified annually.

STRATEGY II.2.1 Annually evaluate and select target groups from the following populations: 1) middle and high school students, parents, guidance counselors and administrators; 2) elementary and primary school parents and administrators; 3) parents and grandparents of pre-school age children; 4) parent/teacher organizations and civic groups supporting the education of children, 5) home study students; 6) potential and current postsecondary students; and 7) postsecondary financial aid professionals and academic counselors.

STRATEGY II.2.2 Implement the plan for marketing the Louisiana College Access Network (Louisiana CAN!), which will integrate the savings, scholarship, grant and loan programs available through the agency.

STRATEGY II.2.3 Request funding to produce and distribute postsecondary financial aid and savings program information to selected target groups.

STRATEGY II.2.4 Develop the Louisiana College Access Network (Louisiana CAN!) video and/or DVD and Power Point presentations to be provided to employers, parent/teacher organizations, civic groups, etc.

STRATEGY II.2.5 Continue annual Guidance Counselor Workshops.

STRATEGY II.2.6 Continue annual Trailblazer Camps.

STRATEGY II.2.7 Continue to publish a monthly electronic newsletter, the LOSFA Loop, and the FAN Letter (Financial Aid News).

STRATEGY II.2.8 Develop a master plan for holding parish-wide or multi-parish College/Career Fairs, in conjunction with the Board of Regents and Local Education Authorities.

STRATEGY II.2.9 Continue to provide training on all Agency programs to schools and lenders in conjunction with the Louisiana Association of Student Financial Aid Administrators' Conferences.

STRATEGY II.2.10 Continue to supply content to update the Agency web site.

STRATEGY II.2.11 Continue to support maintenance of the Student Transcript System to include 9 – 12th grade transcript reporting, in partnership with the Board of Regents and the Department of Education.

STRATEGY II.2.12 Continue to participate in the “Mapping Your Future” project to broaden the base of information on financial aid available to Louisiana students and parents.

STRATEGY II.2.13 Continue annual Taylor Opportunity Program for Students (TOPS) Seminars for Parents.

STRATEGY II.2.14 Develop and implement outreach programs for socio-economically disadvantaged and underrepresented individuals in programs administered by the Agency that involve the faith-based community in the distribution efforts.

STRATEGY II.2.15 Collaboratively sponsor a College Goal Sunday annually.

STRATEGY II.2.16 Update the information provided for the Board of Regents E-Portal, as needed.

STRATEGY II.2.17 Produce electronic publications for prompt dissemination of student aid information.

STRATEGY II.2.18 Provide public outreach in compliance with the College Access Initiative.

STRATEGY II.2.19 Develop interdisciplinary team to provide financial literacy and debt management presentations.

STRATEGY II.2.20 Partner with the Louisiana Educational Television Authority and other entities to produce and broadcast financial aid and college savings informational programs.

PERFORMANCE INDICATORS

Input:	Number of identified target groups Size and scope of identified target groups
Output:	Number of contacts made to entities within each target group for the purpose of scheduling training and/or outreach activities Number of entities accepting offer to schedule training and/or outreach activities

	Number of publications distributed or number of people attending training and outreach activities
Outcome	Evidence that sufficient amounts of program information material was provided to reach 100% of individuals in the targeted groups
	Increased awareness of availability of and eligibility for financial aid programs within the target groups
Efficiency:	Percentage of targeted groups receiving information on availability and eligibility of financial aid

OBJECTIVE II.3 Utilize technology to expand access options for internal and external customers.

STRATEGY II.3.1 Continue to test and maintain the Disaster Recovery and Business Continuity Plan.

STRATEGY II.3.2 Collaborate with divisions to increase content posted on the Intranet.

STRATEGY II.3.3 Complete the TOPS software redesign by FY 2009-2010.

STRATEGY II.3.4 Collaborate with divisions to continue to develop and improve applications to support program operations.

STRATEGY II.3.5 Continue to secure funding and budget authority to support technology initiatives.

STRATEGY II.3.6 Implement and evaluate security precautions annually.

STRATEGY II.3.7 Collaborate with divisions to post training and developmental presentations on the agency website.

STRATEGY II.3.8 Maintain and support network infrastructure and applications to support the agency's functions.

PERFORMANCE INDICATORS

Input:	Updates to software Redesign of software Implementation and integration of new technology Upgrades to web site
Output:	Increased access to and availability of information on the web site Time and cost savings achieved
Outcome:	Percent change in web site access Increased efficiency in processing all financial aid programs
Efficiency:	Increased productivity of agency's staff Increased efficiency providing information via the web site

OBJECTIVE II.4 Partner with the Board of Regents and the Board of Elementary and Secondary Education in developing state student financial aid programs that support the state's student aid plan.

STRATEGY II.4.1 Develop a centralized database for agency program performance information that facilitates production of historical trend data for use in research and planning.

STRATEGY II.4.2 In partnership with the Board of Regents, provide research-based input for use in the development of state student aid policy, plans and programs.

STRATEGY II.4.3 Maintain permanent liaison with the Board of Regents that facilitates the integration of input from the agency and the professional financial aid community to Regents on the development of state student aid policy, plans and programs.

STRATEGY II.4.4 In partnership with the Board of Regents, conduct college aid director symposiums to seek input that contributes to the development of student aid policy, plans and programs.

STRATEGY II.4.5 Maintain permanent liaison with the Board of Elementary and Secondary Education that facilitates the development of state student aid policy, plans and programs.

STRATEGY II.4.6 In partnership with the Board of Elementary and Secondary Education, develop programs to inform students, parents, teachers, counselors and school administrators of student aid policy, plans and programs.

PERFORMANCE INDICATORS

Input:	A plan for the development of a centralized database for agency performance information
Output:	Production of historical trend reports relative to agency program performance
Outcome:	A comprehensive state student aid plan that integrates component programs administered by the agency The development of a centralized database and the ensuing production of historical data reports
Efficiency:	Development of student aid component programs that support the state student aid plan

OBJECTIVE II.5 To provide program information to 100% of targeted individuals and groups interested in Section 529 college savings plans.

STRATEGY II.5.1 Annually reevaluate current target groups and plan for expansion of target groups to be selected.

STRATEGY II.5.2 Implement the plan for marketing the Louisiana College Access Network (Louisiana CAN!), which will integrate the savings, scholarship and loan programs available through the agency.

STRATEGY II.5.3 Produce and distribute materials appropriate to the audience that include changes to the Student Tuition Assistance and Revenue Trust (START) Saving Program to include program changes.

STRATEGY II.5.4 Continue to publish a quarterly *STARTing Line*.

STRATEGY II.5.5 Continue to supply content to update the Agency web site.

STRATEGY II.5.6 Continue annual START Saving Program Seminars.

STRATEGY II.5.7 Develop and implement outreach programs for socio-economically disadvantaged and underrepresented individuals on the benefits of the START Saving Program that involve the faith-based community in the distribution efforts.

STRATEGY II.5.8 Develop electronic publications for prompt dissemination of student START Saving Program.

STRATEGY II.5.9 Secure state general funds to provide personnel, publications, advertising and information to market the START Saving Program.

STRATEGY II.5.10 Develop strategies for efficient distribution of marketing.

PERFORMANCE INDICATORS

Input:	Number of identified target groups Size and scope of identified target groups
Output:	Number of contacts made to entities within each target group for the purpose of scheduling training and/or outreach activities Number of entities accepting offer to schedule training and/or outreach activities Number of publications distributed or number of people attending training and outreach activities Evidence that sufficient amounts of program information material was provided to reach 100% of individuals in the targeted groups
Outcome:	Increased participation in the START Saving Program by members of the targeted groups
Efficiency:	Percentage of targeted groups receiving information on availability and eligibility of financial aid

OBJECTIVE III.1 Acquire and maintain state funding to support the implementation of federal aid programs that require a state match [Special Leveraging Educational Assistance Partnerships (SLEAP) that will be replaced by the Grants for Access and Persistence (GAP) in 2011-2012] and legislatively approved state financial aid programs, including the tuition repayment plan for certain medical students, Teach Louisiana First, the guarantee of Nursing School Loans Program, and the loan forgiveness program for certain veterinary students specializing in food animals.

STRATEGY III.1.1 In coordination with other interested parties, maintain program information to demonstrate the fiscal impact and benefit to the state resulting from the funding of these programs.

STRATEGY III.1.2 Seek state appropriated funding from the legislature to implement the programs.

PERFORMANCE INDICATORS

Input: Gathering of data relative to the fiscal impact of the programs and the economic benefit to the state
Output: A business plan outlining the potential benefits to be derived by funding each program
Outcome: Receipt of funding for the programs
Efficiency: Implementation and evaluation of the funded programs

OBJECTIVE IV.1 Plan and perform audits to achieve at least an 85% annual compliance rate with statutes, regulations and directives.

STRATEGY IV.1.1 Meet the requirements of the U.S. Department of Education for schools and lenders as established in federal regulations [34 CFR 682.410(c)].

STRATEGY IV.1.2 Based on risk assessments and the time line for realization of this objective, annually select those high schools and colleges to be audited for compliance with the legal mandates of the scholarship and grant programs administered by the agency.

STRATEGY IV.1.3 Plan and perform audits to achieve at least a 95% confidence level in each audit.

STRATEGY IV.1.4 Annually audit collection contractors.

STRATEGY IV.1.5 Annually develop and implement an internal audit plan.

STRATEGY IV.1.6 Disseminate audit reports to interested parties.

STRATEGY IV.1.7 Enhance customer satisfaction and compliance through proactive customer services including publication of audit checklists and guides on the agency's website; fast turnaround with answers to audit related inquiries; advanced notice of audits; entrance sessions that explain the purpose and scope of the audit; exit sessions that fully explain findings, observations, and recommendations; reasonable recommendations; and publication of completed audit reports on the agency's website.

PERFORMANCE INDICATORS

Input: Number of audits planned to achieve compliance level
Output: Number of audits performed
Number of audit reports completed
Outcome: Compliance level determined by audits
Quality: Annual compliance rate of at least 85%
Efficiency: Regulatory compliance and reduced audit findings

OBJECTIVE V.1 To recruit, maintain and support a qualified, well-trained workforce to manage and administer the federal and state student financial aid programs.

STRATEGY V.1.1 Use outreach programs to maximize recruitment of qualified employees that represent the diverse population of the state.

STRATEGY V1.2 Allocate positions at appropriate levels in relation to the jobs performed and implement special pay policies, when appropriate.

STRATEGY V1.3 Ensure that all new supervisors complete mandatory Comprehensive

Public Training Program training within three years of appointment date as a supervisor or a change in supervisory status.

STRATEGY VI.4 Develop and implement a policy that encourages, recognizes and rewards employees for outstanding performance.

STRATEGY VI.5 Provide accessibility to employee benefits, training and assistance programs to enhance employee morale and performance.

STRATEGY VI.6 Conduct 100% of annual employee performance evaluations (Performance Planning and Review – PPRs) on time.

STRATEGY VI.7 Continue to develop content for the agency website to maximize access to job openings and announcements, agency policies and Human Resource tools.

STRATEGY VI.8 Develop and implement human resources policies that are helpful and beneficial to women and families and support work life balance for all employees.

STRATEGY VI.9 Provide appropriate incentives to recruit and retain qualified and well-trained employees using authority provided by Civil Service.

STRATEGY VI.10 Develop and implement human resource strategies to address workforce and succession planning.

PERFORMANCE INDICATORS

Input:	Number of positions eligible for compensation review Number of supervisors requiring training
Output:	Number of supervisors completing required training
Outcome:	Retention rate of employees Completion rate of PPRs
Efficiency:	Percentage of compliance based upon Civil Service program requirements Diversity characteristics of hires and promotions compared to diversity characteristics of qualified available applicants

OBJECTIVE VI.1 Maximize federal revenues to the agency’s Operating Fund annually.

STRATEGY VI.1 Pursue the Federal Family Education Loan Program (FFELP) administrative structure that is most financially advantageous to the state and Louisiana students.

STRATEGY VI.2 Seek state funding and support for state financial aid initiatives.

STRATEGY VI.3 Analyze the effectiveness of programs funded by surplus federal revenues from the agency’s Operating Fund.

STRATEGY VI.4 Increase loan guarantee volume to maximize financial returns from the Federal Family Education Loan Program.

PERFORMANCE INDICATORS

Input:	Request that the legislature appropriate sufficient state funds to support state financial aid programs
Output:	Additional revenue generated for the agency's Operating Fund
Outcome:	Excess revenues to support state financial aid programs
Efficiency:	Long-term financial stability for the FFELP guarantor function and maximization of revenues to augment or supplant funding for state student aid programs

OBJECTIVE VII.1 Implement and maintain controls sufficient to ensure compliance with applicable statutes, rules, guidance, directives, industry standards and ethical standards.

STRATEGY VII.1 Create, publish, update and enforce agency policies and procedures for all operational and support functions.

STRATEGY VII.2 Ensure employees attend and participate in related industry/trade organizations.

STRATEGY VII.3 Ensure employees attend professional training sessions and continuing education programs.

STRATEGY VII.4 Closely coordinate with legislative staff and legislators.

STRATEGY VII.5 Conduct internal audits of operational and support functions.

STRATEGY VII.6 Prepare financials for the START Saving Program.

STRATEGY VII.7 Prepare financials for the FFEL Program.

STRATEGY VII.8 Prepare financials for the agency.

STRATEGY VII.9 Update program rules to implement legislative changes and new programs.

STRATEGY VII.10 Ensure employees receive ethics training and subsequent refresher training.

PERFORMANCE INDICATORS

Input:	Budget allocation for Administrative Support Services
Output:	Program Rules START Disclosure Statement and Supplements Federal Financial Reports
Outcome:	Agency administrative costs of less than 4% Minimize administrative costs and maximize funds available for programs benefiting students Increased compliance with applicable statutes, rules, guidance, directives, industry standards and ethical standards
Efficiency:	Ratio of Agency total annual expenditures and START deposits to Agency administrative cost Quality: Number of Audit Findings minimized or eliminated

LOAN OPERATIONS

MISSION: To administer the federal and state student financial aid programs that are assigned to the Louisiana Student Financial Assistance Commission.

GOALS:

I. To effectively and efficiently administer federal and state loan programs in compliance with statutory authority and regulation.

II. To maximize program revenues from the Agency's administration of the Federal Family Education Loan Program (FFELP).

OBJECTIVE I.1: To maintain a reserve ratio that is never less than the minimum federal requirement of .25%.

STRATEGY I.1.1 Maintain the lowest possible default rate, not to exceed 5% of loans in repayment at the end of each fiscal year.

STRATEGY I.1.2 Utilize technology to increase efficiency in responding to borrowers' questions and problems.

STRATEGY I.1.3 Annually review and revise letters sent to borrowers delinquent in repayment of their student loans, which inform them of repayment options and the consequences of default.

PERFORMANCE INDICATORS

Input:	Reserve fund balance Dollar value of outstanding loan guarantees
Output:	Reserve ratio – reserve fund balance/loan guarantees outstanding
Outcome:	Compliance with federal requirement
Efficiency:	Regulatory compliance and management indicator of performance

OBJECTIVE II.1 To achieve a 65% or greater share of the state's student loan market by the end of Federal Fiscal Year 2013.

STRATEGY II.1.1 Identify, develop and implement value added services for clients.

STRATEGY II.1.2 Customize marketing efforts and services to individual schools.

STRATEGY II.1.3 Develop alliances with other industry participants that will promote use of the state's guarantee.

STRATEGY II.1.4 Not less than twice each year, School Lender Section representatives will conduct on-site visits to their assigned schools.

STRATEGY II.1.5 Continue to support the Louisiana Association of Student Financial Aid Administrators (LASFAA), the state's financial aid professional association, by participating at LASFAA conferences as an exhibitor and by sending representatives to the Southwest Association of Student Financial Aid Administrators regional and National Association of Student Financial Aid Administrators conventions.

STRATEGY II.1.6 Directly market to the Louisiana Association of Independent Colleges and Universities and highlight the benefits to the State of using the Agency’s loan guaranty program.

PERFORMANCE INDICATORS

Input:	Total FFELP loans originated by Louisiana’s schools during the federal fiscal year Total loans guaranteed by the agency for the corresponding federal fiscal year
Output:	Percentage of the total state FFELP loans that were guaranteed by the agency
Outcome:	The agency’s share of the total FFELP loans originated by Louisiana schools during federal fiscal year 2013 equals or exceeds 65%
Efficiency:	Increased market share, greater revenue and greater cost efficiencies

OBJECTIVE II.2 To achieve a cumulative recovery rate on defaulted loans of 85% by State Fiscal Year (SFY) 2012-2013.

STRATEGY II.2.1 Increase the average monthly total for Administrative Wage Garnishment collections to \$790,000 for SFY 2012-2013.

STRATEGY II.2.2 Develop and evaluate an incentive program that encourages defaulted borrowers to make timely payments.

STRATEGY II.2.3 Evaluate and refine the techniques for collection of defaulted loans to encourage a higher percentage of defaulted borrowers to initiate payments and to increase the average amount paid.

STRATEGY II.2.4 Increase the percentage of new defaulted accounts that are retained in-house to 88% by SFY 2012-2013.

STRATEGY II.2.5 Increase rehabilitations to a total of \$12,000,000 for the 2012-2013 SFY.

PERFORMANCE INDICATORS

Input:	Cumulative recoveries (in millions of dollars) Cumulative defaults (in millions of dollars)
Output:	Cumulative default recovery rate
Outcome:	Increase in dollars collected
Efficiency:	A cumulative recovery rate of 85%, which minimizes outstanding defaults and increases revenues

SCHOLARSHIP, GRANT and SAVING PROGRAM

MISSION: To administer state and federal scholarship, grant and tuition savings programs to maximize the opportunities for Louisiana students to pursue their postsecondary educational goals.

GOAL: To effectively and efficiently administer assigned programs in compliance with statutory authority and regulation.

OBJECTIVE I.1: To achieve the lowest possible ratio of administrative expenses to dollars awarded as scholarship and grants and managed assets in the Student Tuition Assistance and Revenue Trust (START) Tuition and Saving Fund, not to exceed 4% per annum.

STRATEGY I.1.1 Continue to cross train personnel on all Division programs to maximize the experience and flexibility of human resources, provide operational redundancy and achieve economies of scale in administering programs.

STRATEGY I.1.2 Coordinate with the Information Technology Division to develop computer software to enhance operational efficiency for all scholarship and grant programs.

STRATEGY I.1.3 Closely monitor administrative costs in relation to program funding.

PERFORMANCE INDICATORS

Input:	Budget for administrative costs for the State Fiscal Year
Output:	Dollar value of state scholarship and grant program awards and START Tuition and Saving Fund
Outcome:	Minimize program costs to maximize funding available to program participants
Efficiency:	Ratio of administrative costs to dollar value of scholarship and grant programs and START Saving Fund less than 4%

OBJECTIVE I.2 To achieve or exceed the projected Student Tuition Assistance and Revenue Trust (START) Saving Program participation of 52,000 account owners and principal deposits of \$475 million by the end of the 2012-2013 State Fiscal Year.

STRATEGY I.2.1 In cooperation with the Public Information and Communications Division and School and Lender Services Section, expand the marketing plan to advertise START as a component of Louisiana's College Access Network (Louisiana CAN!).

STRATEGY I.2.2 Update and distribute START pamphlets, applications, disclosure documents and financials, as required.

STRATEGY I.2.3 Increase outreach activities.

STRATEGY I.2.4 Continue improvement of the START Web Site to enhance interactive usage by START account owners/beneficiaries.

STRATEGY I.2.5 Plan and implement a campaign to increase philanthropic donations to Category 6 Accounts as a means of assisting students with extreme financial need.

STRATEGY I.2.6 Secure funding and authorization for a position dedicated to marketing the START Saving Program.

STRATEGY I.2.7 Review other Section 529 plans to find practices, procedures and perks that will increase customer interest in and satisfaction with the START Saving Program and seek amendments to the program's regulations and statute to implement these enhancements.

PERFORMANCE INDICATORS

Input/Output: Number of account owners and dollar value of principal deposits
START Savings Fund Disbursements

Outcome: Encourages family planning for postsecondary educational expenses;
reduces reliance on student loans and increases college going rate

Efficiency: Ability to attract investors and maximize their investments

OBJECTIVE I.3 To distribute 100% of the state funds appropriated for postsecondary education scholarships, grants and incentives to qualified recipients.

STRATEGY I.3.1 Collaborate with the Board of Regents and postsecondary education community to simplify the identification of qualified recipients and the distribution of funds.

STRATEGY I.3.2 Coordinate with the Information Technology Division to develop computer software to automate and to facilitate administration of scholarships, grants and incentives programs.

STRATEGY I.3.3 Closely monitor available appropriated funds.

STRATEGY I.3.4 Develop and implement procedures to retrieve unused funds for redistribution and disbursement.

STRATEGY I.3.5 Increase outreach activities to insure that students and schools are aware of all postsecondary scholarship, grant and incentive programs.

STRATEGY I.3.6 Continue to provide training materials and provide training sessions for appropriate postsecondary school staff on scholarship and grant programs administered by LOSFA.

PERFORMANCE INDICATORS

Input: State general funds appropriated by program for scholarships, grants and incentives for postsecondary education

Output: State general funds paid out by program for scholarships, grants and incentives for postsecondary education

Outcome: Make postsecondary education affordable for students
Increase access for Louisiana residents to postsecondary education
Increase the number of students receiving postsecondary educations

Efficiency: Maximize the number of students receiving postsecondary educations at the lowest cost to the state

TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

MISSION: To financially assist students by efficiently administering the Taylor Opportunity Program for Students (TOPS).

GOAL: To administer the TOPS program to maximize access to postsecondary education programs.

OBJECTIVE I.1 To determine the TOPS eligibility of 97% of all applicants by September 1st of each application year.

STRATEGY I.1.1 Continue to update internal processing systems to stay current with statute, rule and policy and to enhance operational efficiency.

STRATEGY I.1.2 Continue the cooperative effort with the State Department of Education and the Board of Regents in processing high school graduate academic data through the Student Transcript System (STS).

STRATEGY I.1.3 Continue to provide training sessions on a regular or as needed basis to disseminate information on the TOPS' award process, deadlines, rules governing student eligibility and the procedures for using the STS system.

STRATEGY I.1.4 Initiate action to resolve issues involving applicants and program participants, excluding exceptions, within 3 days of receiving the inquiry and resolve within 14 working days following receipt of complete documentation.

STRATEGY I.1.5 Continue to enhance programming previously developed as a means of detecting academic and application errors from outside sources.

STRATEGY I.1.6 Pursue computer database processing for those special populations that fall outside the majority of applicants.

PERFORMANCE INDICATORS

Input:	Number of Louisiana high school graduates in most recent class Number of students applying for a TOPS award in each application year
Output:	Number of applicants processed
Outcome:	Percentage of participation of most recent graduates Percentage of applicants processed from total records received Percentage change in participation of most recent high school graduates
Efficiency:	Process 97% of applicants no later than September 1 st of their application year

OBJECTIVE I.2 To process 100% of all TOPS billing requests within 10 days of receiving accurate billing data from postsecondary institutions subject to timely receipt of appropriations.

STRATEGY I.2.1 Encourage postsecondary institutions to use Electronic Funds Transfer as a means to expedite the payment process.

STRATEGY I.2.2 Continue to provide training materials and provide training sessions for appropriate postsecondary school staff on the TOPS renewal process, submission of accurate grade data, requests for payment and remission of funds.

STRATEGY I.2.3 Initiate action to resolve issues involving inaccurate grade data and billing errors within 3 days of receiving the inquiry or identifying error.

PERFORMANCE INDICATORS

Input:	Date of receipt of billing request Date billing request verified and all errors corrected
Output:	Date of submitting payment request to the State Treasurer
Outcome:	Submission of payment request to State Treasurer within 10 days of receipt of accurate billing request
Efficiency:	Payment request to State Treasurer within 10 days after receipt of accurate bill

APPENDICES

- A. SERVICES AND CLIENTS
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APPENDIX A

SERVICES AND CLIENTS

1. ADMINISTRATION AND SUPPORT SERVICES PROGRAM

This program is composed of eight organizational elements whose primary mission is to provide service and support to the operating divisions of the Agency (Loan Operations Division and Scholarship/Grant Division), the Louisiana Student Financial Assistance Commission and the Louisiana Tuition Trust Authority.

Divisions:

Public Information and Communications	Research/Planning
Information Technology	Human Resources
Audit	Legal
Finance and Administrative Services	School and Lender Services

The Public Information and Communication Division's (PIC) mission includes marketing and disseminating information to the public. PIC clients include educational institutions, lenders, students and parents who participate in the Federal Family Education Loan Program or who need information/guidance related to any of the scholarship/grant/and savings programs operated by the Agency.

The Information Technology (IT) Division provides technical support for all agency divisions as well as all technical interfaces with clients. The IT Division provides information to the public through its administration of the LOSFA website.

The Audit Division performs an audit function to ensure that educational institutions and lenders are in compliance with federal and state regulations related to the programs in which they participate.

The Finance and Administrative Services Division provides accounting, budgeting, purchasing, records management and mailroom services for the Agency.

The Research/Planning Division provides research and analysis of data to be used in planning and the conceptual development and administrative phase of rule promulgation as applicable for the programs administered by the Agency.

The Human Resources Division performs all functions related to recruitment, indoctrination, placement, and maintenance of the agency's human resources, and acts as liaison to the Department of Civil Service, Office of Group Benefits, the State Employees Retirement System, and other state agencies and ensures Agency compliance with state and federal human resources laws and regulations.

The Legal Division provides legal and paralegal support for all divisions of the agency and to the Student Financial Assistance Commission and the Tuition Trust Authority. The Division represents the agency in legal proceedings, including administrative wage garnishment hearings and bankruptcy proceedings and manages all bankruptcy filings affecting the agency.

The School/Lender Services Section markets Louisiana Office of Student Financial Assistance (LOSFA) programs and services to lenders and postsecondary schools and services their needs; being the primary agency contact for all postsecondary schools and lender needs and issues.

2. LOAN OPERATIONS PROGRAM

The Loan Operations Program of the agency is the sole organizational element comprising the Loan

Operations Division. The mission of the Loan Division is to administer the Federal Family Education Loan Program (FFELP) for the State of Louisiana. The division guarantees loans made by eligible lenders to students enrolled in schools that participate in the FFELP. The division's sections guarantee the loans, assist lenders in keeping loans current that are in repayment, purchase defaulted loans from lenders and collect loans that have been purchased under the guarantee.

- a) The Loan Administration section guarantees loans originated by lenders. This section also performs all servicing functions throughout the life of the loan.
- b) The Default Prevention Section assists lenders, loan servicers and delinquent borrowers in avoiding borrower defaults on delinquent loans.
- c) The Claims Management Section processes claims against the loan guarantee filed by lenders/loan servicers and ensures that all claims scheduled for payment meet program requirements.
- d) The Default Recoveries Section maintains inventory control of defaulted loans and engages in collection activities to maximize recovery of defaulted loans and to ensure compliance with program regulations.

3. SCHOLARSHIP, GRANT AND SAVING PROGRAM

This program includes the agency's Scholarship/Grant and START Saving Divisions. The Scholarship/Grant and the START Savings Divisions are charged with the operation of all state and federal grant, scholarship and savings programs. The client base is the student population of the State and the postsecondary educational institutions attended by students receiving the financial benefits of the programs. The following programs are administered by the Scholarship/Grant and START Savings Divisions:

- a) Leveraging Education Assistance Partnership (LEAP) - a federal program authorized under Title IV of the Higher Education Act of 1965. LEAP includes the Special Leveraging Educational Assistance Partnerships (SLEAP) that will be replaced by the Grants for Access and Persistence (GAP) in 2011-2012.
- b) Paul Douglas Teacher Scholarships – a federally funded scholarship program that was rescinded in the 1995-96 fiscal year and has not been funded for subsequent years. However, under current federal guidance, the agency must assure that former recipients complete their obligation by teaching or repayment.
- c) Rockefeller State Wildlife Scholarship Program - a state program that provides 60 scholarship awards of \$1,000 each to Louisiana residents engaged in the study of wildlife, forestry or marine science at Louisiana colleges and universities.
- d) Taylor Opportunity Program for Students - a comprehensive merit-based state program providing tuition grants for postsecondary education to academically qualified students who are Louisiana residents and graduate from Louisiana high schools or other qualified out-of-state high schools. The program replaced several other scholarship/grant programs commencing with the 1998-99 academic year. The program includes a component that provides an incentive for qualified Louisiana public high school students to prepare for and pursue an industry-based occupational or vocational education credential in a Top Demand Occupation while still in high school.
- e) Tuition Opportunity Program for Students-Teachers - a loan program for students preparing to become teachers that can be repaid by service as a teacher in a Louisiana school. (Although not funded in recent years, the agency must assure that former recipients complete their obligation by teaching or repayment).
- f) Tuition Payment Program for Medical School Students - a loan program for second and third year medical school students that can be repaid by service as a doctor in a rural health shortage area in the

State. Currently, this program is not funded.

- g) Student Tuition Assistance and Revenue Trust (START) Saving Program - a qualified tuition plan, adopted by the state to be in compliance with Section 529, Internal Revenue Code, which serves as a tax benefited college savings plan. The program also provides for state awarded grants as an incentive for families to save for the projected future costs of postsecondary education.
- h) Teach Louisiana First Program - provides incentives for highly qualified and certified teachers to teach in at-risk schools and in rural public schools that have academic deficiencies. Currently, this program is not funded.
- i) Louisiana Grant Opportunity for Youth ChalleNge Skills Training Program – provides tuition for occupations and skill education for graduates of the Louisiana National Guard’s Youth ChalleNge Program who received a Louisiana High School Equivalency Diploma (GED). Currently, this program is not funded.
- j) Guarantee of Nursing School Loans – provides dischargeable loans for certain nursing students. Currently, this program is not funded.
- k) Tuition Payment Program for Food Animal Veterinary Students – a loan forgiveness program to be administered by the Louisiana Student Financial Assistance Commission for certain veterinary students specializing in food animals. Currently, this program is not funded.
- l) Need Based Aid Program – through an interagency agreement with the Louisiana Board of Regents, disburses available funds directly to the state’s higher educational institutions for the purpose of funding grants to needy students, in the amounts allocated by the Regents.
- m) Teachers Education Trust Fund Incentive Program – provides incentives for highly qualified teachers who teach in poor performing schools that have a shortage of certified teachers as determined by the Department of Education. Currently, this program is not funded.
- n) Go Grant Program – assists those students who can demonstrate financial need to pay for the cost of postsecondary education. The GO Grant is used to pay a portion of the cost of attendance at an eligible Louisiana postsecondary institution.
- o) Early Start Program – provides funding to Louisiana public postsecondary institutions that enroll eligible 11th and 12th grade Louisiana public high school students in college degree, developmental, or work skills courses as an incentive for qualified Louisiana public high school students to prepare for a postsecondary education or career.
- p) Health Care Educator Loan Forgiveness Program – a loan forgiveness program that provides funding to students pursuing an advanced degree in Nursing or Allied Health education who later become postsecondary education faculty members in the field of Registered Nursing or top demand Allied Health education, thus filling critical staffing shortages in these areas.

4. TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS PROGRAM)

This program consists solely of the funds that are appropriated for awards to the TOPS scholarship. TOPS is a comprehensive merit-based state program providing tuition grants for postsecondary education to academically qualified students who are Louisiana residents and graduate from Louisiana high schools or other qualified out-of-state high schools or who are qualified Louisiana public high school students pursuing an industry-based occupational or vocational education credential in a Top Demand Occupation while still in high school.

APPENDIX B

EXTERNAL FACTORS

- 1) Competition from national competitors in the student loan program.
- 2) Funding for federal Default Fees not paid by lenders.
- 3) The programs administered by the agency and their funding will be subject to the plan to be developed by the Board of Regents.
- 4) Directors of financial aid at Louisiana's colleges and universities determine which competing agency will guarantee student loans originated at their institutions.
- 5) New student aid programs and extensive revisions of existing programs could be enacted without authorizing the agency additional resources to administer them.
- 6) Tuition will continue to increase faster than family income, which means the demand for all forms of student aid will grow.
- 7) For academically qualified but needy students, there is a continually growing gap between cost of attendance and available aid.
- 8) Maintenance of the Student Transcript System (STS) is essential to the continuation of the agency's automated scholarship award process.
- 9) Natural disasters can adversely affect the agency, its appropriations or self-generated revenues to the extent that the agency's ability to fulfill its mission is impaired.
- 10) The Higher Education Reconciliation Act of 2005 reduced certain retention rates, which will result in decreased revenues.
- 11) Changes to the Higher Education Act are being considered by Congress that may eliminate the Federal Family Education Loan Program (FFELP) and depending on the successor program, may reduce or eliminate federal revenues to the agency.
- 12) The enactment of various ethics laws and rules and the adoption of codes of conduct that impose new restrictions and prohibitions on business conduct.
- 13) Term limits for state board and commission members and new ethics laws will increase the turnover in members of governing boards thus reducing corporate memory and expertise on the boards and making it more difficult to fill board vacancies.
- 14) Appropriations for the GO grant and Early Start programs have been less than needed to provide all eligible students with financial assistance.

INTERNAL FACTORS

- 1) Layoff of personnel and reduction in authorized positions in 2006 and a reduction in the Table of Organization positions in 2009 limit the ability of the agency to meet financial goals and to serve its clients.
- 2) Projected retirements and turnover of key staff members through FY 2013 could adversely affect the agency's depth of experience and level of expertise.
- 3) The legislature's continual changes and expansion of the Taylor Opportunity Program for Students (TOPS) has complicated program administration and confused parents and students.
- 4) Maintenance of diversification within the agency's executive staff is necessary to assure that the perspectives of major populations within the state are represented.
- 5) Refusal to authorize and fund the agency's staffing requirements has placed excessive burdens on key staff members and threatened the quality of services provided to students.
- 6) To maintain a high level of service, the agency may have to continue utilizing revenues from its administration of the Federal Family Education Loan Program (FFELP) or its successor to supplant shortfalls in general fund appropriations.
- 7) Agency's ability to compete with national not-for-profit guarantors is restricted by budget and by government bureaucracy including civil service restrictions on hiring, cumbersome contracting processes, and spending.

APPENDIX C

STATUTORY AUTHORITY

The following is a list of statutory authority for the programs directed by the Agency:

- 1) LSA-R.S. 36:642.D(2) - the Louisiana Student Financial Assistance Commission is responsible for the supervision, control, direction and administration of state programs on higher education financial assistance.
- 2) LSA-R.S. 36:650.A - the Office of Student Financial Assistance shall perform the functions of the state relating to the programs of financial assistance for higher education.
- 3) LSA-R.S. 17:3021 *et seq.* - establishes the Louisiana Student Financial Assistance Commission as the state agency responsible for the supervision, control, direction and administration of state and federal programs to provide loans to assist persons in meeting the expenses of higher education and state and federal scholarship programs for higher education.
- 4) LSA-R.S. 17:3023.4 - authorizes the Louisiana Student Financial Assistance Commission to guarantee loans to students under the Federal Family Education Loan Program.
- 5) 20 USCA 1071 *et seq.* (Part B, Title IV, Higher Education Act of 1965, as amended) - establishes the state guarantee agency responsibilities under the Federal Family Education Loan Program.
- 6) 20 USCA 1070c *et seq.* (Subpart 4, Part A, Title IV, Higher Education Act of 1965, as amended) - provides for the Leveraging Educational Assistance Partnership Program that is administered by the Louisiana Student Financial Assistance Commission.
- 7) 20 USCA 1104 *et seq.* (Repealed) (P.L. 98-558) – Paul Douglas Scholarships – a federally funded scholarship program that was rescinded in the 1995-96 fiscal year and has not been funded for subsequent years. However, under current federal guidance, the agency must assure that former recipients complete their obligation by teaching or repayment.
- 8) LSA-R.S. 17:427.3 – establishes the Teach Louisiana First Program to be administered by the Louisiana Student Financial Assistance Commission. Currently, this program is not funded.
- 9) LSA-R.S. 17:3041.10 *et seq.* – provides for a tuition payment program to be administered by the Louisiana Student Financial Assistance Commission for certain medical school students at LSU or Tulane who agree to practice medicine in a rural or poor community in Louisiana for at least five years.
- 10) LSA-R.S. 17:3042 *et seq.* - establishes the Tuition Opportunity Program for Students - Teachers to be administered by the Louisiana Student Financial Assistance Commission. This program exists only insofar as repayment is due from students who have not fulfilled their obligations to teach in the elementary and secondary schools of the state.
- 11) LSA-R.S. 17:3042.11 – establishes the Teachers Education Trust Fund Incentive Program to be administered by the Louisiana Student Financial Assistance Commission. This program was created to provide additional incentives for qualified teachers to locate and teach in disadvantaged and under-served geographical areas of the state. Currently, this program is not funded.

- 12) LSA-R.S. 17:3042.51 *et seq.*- establishes the Guarantee of Nursing School Loans Program to be administered by the Louisiana Student Financial Assistance Commission.
- 13) LSA-R.S. 17:3042.61 *et seq.*- provides for a loan forgiveness program to be administered by the Louisiana Student Financial Assistance Commission for certain veterinary students specializing in food animals. The program provides for loan forgiveness in return for service and is available for up to four students per year. Currently, this program is not funded.
- 14) LSA-R.S. 17:3048.1 *et seq.* – establishes the Louisiana Taylor Opportunity Program for Students to be administered by the Louisiana Student Financial Assistance Commission.
- 15) LSA-R.S. 17:3050.1 *et seq.*- establishes the Louisiana Grant Opportunity for Youth ChalleNge Skill Training Program to be administered by the Louisiana Student Financial Assistance Commission. Currently, this program is not funded.
- 16) LSA-R.S. 17:3093 - creates the Louisiana Tuition Trust Authority.
- 17) LSA-R.S. 17:3091 *et seq.* - establishes the Louisiana Student Tuition Assistance and Revenue Trust Program (START) Saving Program, to be administered by the Louisiana Tuition Trust Authority.
- 18) LSA-R.S. 37:2951 - requires the denial of trade, occupational, and professional licenses and renewal licenses for applicants who have defaulted on student loans until such time as the applicant makes satisfactory arrangements to repay the loan.
- 19) LSA-R.S. 56:797D(2) - establishes the Rockefeller Foundation Scholarship fund to be administered by the Louisiana Student Financial Assistance Commission.
- 20) Act 695 of the 2004 Regular Session of the Legislature and a memorandum of understanding by and between the Louisiana Board of Regents and the Louisiana Student Financial Assistance Commission - establishes the Louisiana Go Grant program to be administered by the Louisiana Student Financial Assistance Commission;
- 21) R.S. 17:3137 and memorandum of understanding by and between the Louisiana Board of Regents and the Louisiana Student Financial Assistance Commission - provides for the Louisiana Early Start program (formerly the Dual Enrollment Program) to be administered by the Louisiana Student Financial Assistance Commission;
- 22) Memorandum of understanding by and between the Louisiana Board of Regents and the Louisiana Student Financial Assistance Commission - establishes the Health Care Educator Loan Forgiveness Program to be administered by the Louisiana Student Financial Assistance Commission.

APPENDIX D

PROGRAM EVALUATION

- 1) Each division in the Agency and each section within a division conduct detailed operational planning on an annual basis. Specific goals are set during the planning sessions, which are evaluated periodically.
- 2) Interactions with the membership of national trade associations, educational institutions and lenders produce feedback on performance and comparative information that are used to gauge the effectiveness of programs and the efficiency of the agency in administering them.
- 3) Analysis of industry data from other agencies, lenders and loan servicers produces comparative information for benchmarking the agency's performance.
- 4) The agency undergoes periodic audits from the Financial Partner Eligibility and Oversight of the Office of Federal Student Aid of the U.S. Department of Education, the Louisiana Legislative Auditor and the Office of Financial Institutions.

APPENDIX E

BENEFICIARIES OF AGENCY OBJECTIVES

There are four groups that benefit from the programs operated by the Agency, as follows:

- 1) Individuals, primarily those domiciled in the State, seeking financial assistance for themselves or their family members for pursuit of a postsecondary education.
- 2) Educational institutions.
- 3) Financial institutions participating as lenders in the Federal Family Education Loan Program, and their loan-servicing contractors.
- 4) Louisiana employers.

APPENDIX F

PERFORMANCE INDICATORS

The Agency monitors the following performance indicators as reflected in the Performance Indicator Matrix and Indicator Documentation Sheets:

ADMINISTRATION AND SUPPORT SERVICES PROGRAM

OBJECTIVE I.1	Administrative/Support Services Program Expenditures Percentage of administrative costs to total agency budget and START contributions (S) TOTAL OSFA Budget and START Saving Program (S) Percentage of administrative costs to total agency budget (G)
OBJECTIVE II.1	Percent of calls answered (S) Number of calls received (S) Number of calls answered (S)
OBJECTIVE II.2	Loan, Scholarship and Grant Program Public Education Activities
OBJECTIVE II.3	Expanding Customer Access
OBJECTIVE II.4	Development of Student Aid Programs
OBJECTIVE II.5	Student Tuition Assistance and Revenue Trust (START) Saving Program Public Education Activities
OBJECTIVE III.1	Acquisition of State Level Funding for State Programs
OBJECTIVE IV.1	Number of audits planned to achieve compliance level (K) Number of audits performed (K) Compliance level determined by audits (K) Percentage of planned audits performed (S)
OBJECTIVE V.1	Human Resources Review
OBJECTIVE VI.1	Maximization of Federal Operating Funds
OBJECTIVE VII.1	Implement and maintain adequate controls

LOAN OPERATIONS

OBJECTIVE I.1	Reserve Ratio – reserve balance/loans outstanding (K) Reserve fund cash balance (K) Loans Outstanding (K) Annual default rate (K) Loans in repayment at end of prior federal fiscal year (S) Annual default claims paid (S)
OBJECTIVE II.1	Net FFELP loan volume guaranteed by LOSFA

OBJECTIVE II.2	Cumulative Default Recovery Rate (K) Cumulative defaults (S) Cumulative recoveries (S) Annual recoveries of defaulted loans (G)
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SCHOLARSHIP, GRANT AND SAVING PROGRAM

OBJECTIVE I.1	Administrative costs of Scholarship, Grant and START Saving Program Total Scholarship/Grant and TOPS awards and START contributions (S) Percentage of Scholarship/Grant administrative expenses to awards and START Saving fund assets managed (S) Administrative costs of S/G Program and START Program (G) Total S/G and START awards (G) Percentage of S/G and START administrative costs to awards (G)
OBJECTIVE I.2	Number of Account Owners (K) Principal Deposits (K) START Savings Fund disbursements (G)
OBJECTIVE I.3	Number of recipients: LEAP (G) Total Appropriated: LEAP (G) Total Awarded: LEAP (G)

Average Amount Awarded: LEAP (G)
Number of recipients: Rockefeller (G)
Total Appropriated: Rockefeller (G)
Total Awarded: Rockefeller (G)
Average Amount Awarded: Rockefeller (G)

Number of recipients: Teach LA First (G)
Total Appropriated: Teach LA First (G)
Total Awarded: Teach LA First (G)
Average Amount Awarded: Teach LA First (G)
Number of recipients: GO Youth (G)
Total Appropriated: GO Youth (G)
Total Awarded: GO Youth (G)
Average Amount Awarded: GO Youth (G)
Total distributed: Need-based Aid Program (G)
Institution Distribution to 4-Year Public: Need-Based Aid Program (G)
Institution Distribution to 4-Year Private: Need-Based Aid Program (G)
Institution Distribution to 2-Year Public: Need-Based Aid Program (G)
Institution Distribution to Technical College: Need-Based Aid Program (G)
Louisiana GO Grant recipients (G)
Total Appropriated: Louisiana GO Grants (G)
Total Awarded: Louisiana GO Grants (G)
Louisiana GO Grant Average Award (G)
Louisiana Early Start recipients (G)
Total Appropriated: Early Start (G)
Total Awarded: Early Start (G)
Early Start Average Award (G)

TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

OBJECTIVE I.1 Total amount awarded (K)
 Total number of award recipients (K)
 Number of (high school) graduates who applied for TOPS (S)
 Number of applicants whose eligibility was determined by September 1st (S)
 Percentage of applicants whose eligibility was determined by September 1st (K)
 Number of Louisiana High School Graduates (G)
 Percentage of graduates eligible for TOPS (G)
 Percentage of TOPS Eligible Graduates receiving TOPS awards (G)
 Average Amount Awarded: Opportunity (G)
 Average Amount Awarded: Performance (G)
 Average Amount Awarded: Honors (G)
 Average Amount Awarded: Teachers (G)
 Average Amount Awarded: Technical (G)
 Average Amount Awarded: National Guard Book Fee (G)
 Retention Rate of TOPS award for second year: Opportunity (G)
 Retention Rate of TOPS award for second year: Performance (G)
 Retention Rate of TOPS award for second year: Honors (G)
 Retention Rate of TOPS award for second year: Teacher (G)
 Retention Rate of TOPS award for second year: Technical (G)
 Teacher Prep Loan Fund: Total number of recipients (G)
 Teacher Prep Loan Fund: Total amount awarded (G)
 Teacher Prep Loan Fund: Number of renewal awards (G)
 Teacher Prep Loan Fund: Number of new awards (G)
 Teacher Prep Loan Fund: Number of graduates (G)
 Teacher Prep Loan Fund: Number of graduates who have fulfilled their teaching requirement (G)
 Teacher Prep Loan Fund: Number of awards repaid in full (G)
 Teacher Prep Loan Fund: Number of loans in repayment (G)

OBJECTIVE I.2 Total number of accurate billing requests received (S)
 Total number of billing requests processed within 10 days of receipt of accurate information (S)
 Percent billing requests processed within 10 days of receipt of accurate information (S)

**ADMINISTRATION AND SUPPORT SERVICES
PERFORMANCE INDICATOR MATRIX**

PROGRAM OBJECTIVE	INPUTS	OUTPUTS	OUTCOMES	EFFICIENCY/QUALITY
OBJECTIVE I.1	START deposits Agency administrative costs	Agency administrative costs of less than 4%	Minimize administrative costs and maximize funds available for programs benefiting students	Ratio of Agency total annual expenditures and START deposits to Agency administrative cost
OBJECTIVE II.1	Number of individuals staffing the phones Number of incoming phone calls Number of other inquiries	Number of phone calls answered Number of other inquiries answered	Percentage of calls answered Percentage of other inquiries answered	Phone calls answered per individual staffer Phone answering rate of 98% Other inquiry answering rate of 100%
OBJECTIVE II.2	Number of identified target groups Size and scope of identified target groups	Number of contacts made to entities within each target group for purpose of scheduling training and/or outreach activities Number of entities accepting offer to schedule training and/or outreach activities Number of publications distributed or number of people attending training and outreach activities Evidence that sufficient amounts of program information material was provided to reach 100% of individuals in the targeted groups	Increased awareness of availability of and eligibility for financial aid programs within the target groups.	Percentage of targeted groups receiving information on availability and eligibility of financial aid
OBJECTIVE II.3	Updates to software Redesign of software Implementation and integration of new technology Upgrades to web site	Increased access to and availability of information on the web site Time and cost savings achieved	Percent change in web site access Increased efficiency in processing all financial aid programs	Increased productivity of agency's staff Increased efficiency providing information via the website

PROGRAM OBJECTIVE	INPUTS	OUTPUTS	OUTCOMES	EFFICIENCY/QUALITY
OBJECTIVE II.4	A plan for the development of a centralized database for agency performance information	Production of historical trend reports relative to agency program performance	A comprehensive state student aid plan that integrates component programs administered by the agency Development of centralized database and the ensuing production of historical data reports	Development of student aid component programs that support the state student aid plan
OBJECTIVE II.5	Number of identified target groups Size and scope of identified target groups	Number of contacts made to entities within each target group for purpose of scheduling training and/or outreach activities Number of entities accepting offer to schedule training and/or outreach activities Number of publications distributed or number of people attending training and outreach activities Evidence that sufficient amounts of program information material was provided to reach 100% of individuals in the targeted groups	Increased participation in the START Saving Program by members of the targeted groups	Percentage of targeted groups receiving information on availability and eligibility of financial aid
OBJECTIVE III.1	Gathering of data relative to fiscal impact and economic benefit of programs	Business plan outlining the potential benefits of funding each program	Receipt of funding for programs	Implementation and evaluation of funded programs
OBJECTIVE IV.1	Number of audits planned to achieve compliance level	Number of audits performed Number of audit reports completed	Compliance level determined by audits	Annual compliance rate of at least 85% Regulatory compliance and reduced audit findings
OBJECTIVE V.1	Number of positions eligible for compensation review Number of supervisors requiring training	Number of supervisors completing required training	Retention rate of employees Completion rate of PPRs	Percentage of compliance based upon Civil Service requirements Diversity characteristics of hires and promotions compared to diversity characteristics of qualified available applicants

PROGRAM OBJECTIVE	INPUTS	OUTPUTS	OUTCOMES	EFFICIENCY/QUALITY
OBJECTIVE VI.1	Request that the legislature appropriate sufficient state funds to support state financial aid programs	Additional revenue generated for the agency's Operating Fund	Excess revenues to support state financial aid programs	Long-term financial stability for the FFELP guarantor function and maximization of revenues to augment or supplant funding for state student aid programs
VII.1	Budget Allocation for Administrative Support Services	Program Rules START Disclosure Statement and Supplements Federal Financial Reports Agency administrative costs of less than 4%	Minimize administrative costs and maximize funds available for programs benefitting students Increased compliance with applicable statutes, rules, guidance, directives, industry standards and ethical standards.	Ratio of Agency total annual expenditures and START deposits to Agency administrative cost Number of Audit Findings minimized or eliminated

OFFICE OF STUDENT FINANCIAL ASSISTANCE

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES PROGRAM

Objective: I.1

Indicator Name: Administrative/Support Services Program Expenditures

Indicator LaPAS PI Code: None

- 1. Type and Level:** Output/None
- 2. Rationale:** Administrative costs are an essential part of conducting business. Objective I.1 provides a goal to limit administrative costs to less than 4% of the agency's total annual expenditures and Student Tuition Assistance and Revenue Trust (START) Saving Program deposits. Administrative costs include the labor; materials; facilities; equipment; and fees allocated to general administrative or overhead functions. Administrative costs also include such functions as executive management, legal services, safety, human resource management, insurance, technology and data management, auditing, mailroom operations, customer service and procurement services, among other administrative services. This indicator reports the agency's expenditures that are classified as administrative costs.
- 3. Use:** This measure is used to monitor the agency's administrative costs by calculating an operating efficiency ratio to evaluate whether the costs are consistent with the agency's budget.
- 4. Clarity:** The indicator name clearly identifies what is being measured.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data for this indicator is financial data reported in the state's Integrated Statewide Information Systems (ISIS). This data is reported on a state fiscal year basis and is reviewed daily. The indicator is reported on a semi-annual basis with current information.
- 7. Calculation Methodology:** The indicator is the appropriation for the Administration and Support Services Program.
- 8. Scope:** The indicator is an aggregation of the program expenditures for the activities contained in the Administration and Support Services Program portion of the agency's budget.
- 9. Caveats:** There are no caveats for this indicator.

Responsible Person: Contact Mary Jane Lange, Accountant Administrator, Finance and Accounting Division, Phone: 225-922-1041, FAX: 225-922-0454, Email: mlange@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES PROGRAM

Objective: I.1

Indicator Name: Percentage of administrative costs to total agency budget and START contributions

Indicator LaPAS PI Code: 20372

- 1. Type and Level:** Efficiency/Supporting
- 2. Rationale:** Administrative costs are an essential part of conducting business. Objective I.1 provides a goal to limit administrative costs to less than 4% of the agency's total annual expenditures and Student Tuition Assistance and Revenue Trust (START) Saving Program deposits. This indicator shows the success of the agency in controlling administrative costs and its operating efficiency.
- 3. Use:** This measure is used to monitor the agency's administrative costs and evaluate if these costs remain consistent with the agency's budget. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The indicator shows the relationship between the agency's administrative costs and its budget/START contributions, not the agency's total expenditures. The START contributions portion of the indicator is the total principal deposits (LaPAS PI Code 4778) to the state's 529 College Savings Plan, the Student Tuition Assistance and Revenue Trust (START) Saving Program.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of the data to perform the calculation is documented in the description for the Total LOSFA Budget and START Saving Program (LaPAS PI Code 20925) and the Administrative/Support Services Program Expenditures indicators.
- 7. Calculation Methodology:** This indicator is determined by a standard calculation of dividing the Administrative/Support Services Program Expenditures by the Total LOSFA Budget and START Saving Program (LaPAS PI Code 20925).
- 8. Scope:** The indicator is a simple calculation using two other defined agency indicators.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Mary Jane Lange, Accountant Administrator, Finance and Accounting Division, Phone: 225-922-1041, FAX: 225-922-0454, Email: mlange@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES PROGRAM

Objective: I.1

Indicator Name: Total LOSFA Budget and START Saving Program

Indicator LaPAS PI Code: 20925

- 1. Type and Level:** Input/Supporting
- 2. Rationale:** Administrative costs are an essential part of conducting business and Objective I.1 sets as a goal the limiting of these costs to less than 4% of the agency's total annual expenditures and Student Tuition Assistance and Revenue Trust (START) Saving Program deposits. This indicator reports the current value of the agency's budget authority, prorated over the fiscal year, and includes the current value of the principal deposits in the START Saving Program.
- 3. Use:** This measure is used to monitor the agency's administrative costs and evaluate if these costs remain consistent with the agency's budget. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The indicator is used to show the relationship between the agency's administrative costs and its budget/START contributions, not the agency's total expenditures. The START contributions portion of the indicator is the total START principal deposits (LaPAS PI Code 4778) to the state's 529 College Savings Plan, the Student Tuition Assistance and Revenue Trust (START) Saving Program.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of budget data for this indicator is the agency's appropriation letter as adjusted by any approved budget amendments. The budget data is prorated and reported semi-annually on a state fiscal year basis. The START data is the total START principal deposits indicator (LaPAS PI Code 4778)
- 7. Calculation Methodology:** The indicator is a simple calculation by adding the current, approved budget level and the total START principal deposits indicator (LaPAS PI Code 4778)
- 8. Scope:** The indicator is a simple calculation using the method described above.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Mary Jane Lange, Accountant Administrator, Finance and Accounting Division, Phone: 225-922-1041, FAX: 225-922-0454, Email: mlange@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES PROGRAM

Objective: I.1

Indicator Name: Percentage of administrative costs to total agency budget

Indicator LaPAS PI Code: 17090

- 1. Type and Level:** Efficiency/General Performance Indicator
- 2. Rationale:** This indicator has been replaced by the “Percentage of administrative costs to total agency budget and START contributions” indicator (LaPAS PI Indicator 20372) that added START contributions as a component of the indicator. It is reported as a GPI indicator for historical purposes.
- 3. Use:** The indicator is not used by the agency. However, the indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The indicator shows the relationship between the agency’s administrative costs and its budget, not the agency’s total expenditures.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of the data to perform the calculation is documented in the description for the Total LOSFA Budget and the Administrative/Support Services Program Expenditures indicators.
- 7. Calculation Methodology:** This indicator is determined by a standard calculation of dividing the Total LOSFA Budget by the Administrative/Support Services Program Expenditures.
- 8. Scope:** The indicator is a simple calculation using the method described above.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Mary Jane Lange, Accountant Administrator, Finance and Accounting Division, Phone: 225-922-1041, FAX: 225-922-0454, Email: mlange@osfa.la.gov.

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Strategic Plan 2008-2013

PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES PROGRAM

Objective: I.1

Indicator Name: Total LOSFA Budget

Indicator LaPAS PI Code: None

- 1. Type and Level:** Input/None
- 2. Rationale:** This indicator has been replaced by the Total LOSFA Budget and START Saving Program indicator (LaPAS PI Indicator 20925) that added START contributions as a component of the indicator. It is reported as a GPI indicator for historical purposes.
- 3. Use:** The indicator is not used by the agency. However, the indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The indicator is used to show the relationship between the agency's administrative costs and its budget, not the agency's total expenditures.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of budget data for this indicator is the agency's appropriation letter as adjusted by any approved budget amendments.
- 7. Calculation Methodology:** The indicator is simply the final budget number reported in the agency's appropriation letter as adjusted by any approved budget adjustments for the state's fiscal year.
- 8. Scope:** The indicator is a simple calculation using the method described above and uses aggregated data.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Mary Jane Lange, Accountant Administrator, Finance and Accounting Division, Phone: 225-922-1041, FAX: 225-922-0454, Email: mlange@osfa.la.gov.

OFFICE OF STUDENT FINANCIAL ASSISTANCE

Strategic Plan 2008-2013

PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES PROGRAM

Objective: II.1

Indicator Name: Percent of calls answered

Indicator LaPAS PI Code: 17093

- 1. Type and Level:** Efficiency/Supporting
- 2. Rationale:** This indicator determines the agency's responsiveness to its customers and the efficiency of the staff in supporting the public.
- 3. Use:** This measure is used to monitor the agency's responsiveness to telephone inquiries from the public. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The indicator name clearly identifies what is being measured.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The agency's telephone system automatically collects data on the number of calls received and the number answered for calls routed to the Agency's 800 number of the local 922-1012 number. These numbers are monitored and answered by the Agency's Public Information and Communications Division. The indicator is reported on a state fiscal year basis semiannually.
- 7. Calculation Methodology:** The Number of calls Received (LaPAS Code 17094) is divided by the Number of Calls Answered (LaPAS Code 20373) to calculate this ratio.
- 8. Scope:** The indicator is calculated using aggregated data for the telephone numbers listed above. Data is collected to document the program (Loans, TOPS, other programs) the call concerns, but that data is not used for this indicator.
- 9. Caveats:** The call data is limited to calls made to the numbers listed above and does not include calls made directly to other agency staff. This indicator captures the vast majority of calls made by the general public to the agency and normally does not include calls from customers such as high schools, colleges and universities.
- 10. Responsible Person:** Contact Gus Wales, Division Director, Public Information and Communications Division, Phone: 225-922-2029, FAX: 225-922-0790, Email: gwales@osfa.la.gov.

OFFICE OF STUDENT FINANCIAL ASSISTANCE

Strategic Plan 2008-2013

PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES PROGRAM

Objective: II.1

Indicator Name: Number of Call Received

Indicator LaPAS PI Code: 17094

- 1. Type and Level:** Input/Supporting
- 2. Rationale:** This indicator is used in evaluating the agency's responsiveness to its customers and the efficiency of the staff in supporting the public.
- 3. Use:** The indicator is used to calculate the Percent of Calls Answered indicator (LaPAS Code 17093). The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The indicator name clearly identifies what is being measured.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The agency's telephone system automatically collects data on the number of calls received and the number answered for calls routed to the Agency's 800 number of the local 922-1012 number. These numbers are monitored and answered by the Agency's Public Information and Communications Division. The indicator is reported on a state fiscal year basis semiannually.
- 7. Calculation Methodology:** The indicator is a direct measurement of the number of calls received on the indicated phone numbers.
- 8. Scope:** The indicator is calculated using aggregated data for the telephone numbers listed above.
- 9. Caveats:** The call data is limited to calls made to the numbers listed above and does not include calls made directly to other agency staff. This indicator captures the vast majority of calls made by the general public to the agency and primarily misses calls from other from other customers such as colleges and universities.
- 10. Responsible Person:** Contact Gus Wales, Division Director, Public Information and Communications Division, Phone: 225-922-2029, FAX: 225-922-0790, Email: gwales@osfa.la.gov.

OFFICE OF STUDENT FINANCIAL ASSISTANCE

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES PROGRAM

Objective: II.1

Indicator Name: Number of calls answered

Indicator LaPAS PI Code: 20373

- 1. Type and Level:** Output/Supporting
- 2. Rationale:** This indicator is used in evaluating the agency's responsiveness to its customers and the efficiency of the staff in supporting the public.
- 3. Use:** The indicator is used to calculate the Percent of Calls Answered indicator (LaPAS Code 17093). It is also used to evaluate the division's staffing level to determine if the size of the staff is adequate to handle the call volume. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The indicator name clearly identifies what is being measured.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The agency's telephone system automatically collects data on the number of calls received and the number answered for calls routed to the Agency's 800 number of the local 922-1012 number. These numbers are monitored and answered by the Agency's Public Information and Communications Division. The indicator is reported on a state fiscal year basis semiannually.
- 7. Calculation Methodology:** The indicator is a direct measurement of the number of calls answered on the indicated phone numbers.
- 8. Scope:** The indicator is calculated using aggregated data for the telephone numbers listed above. Data is collected to document the program (Loans, TOPS, other programs) the call concerns, but that data is not used for this indicator.
- 9. Caveats:** The call data is limited to calls made to the numbers listed above and does not include calls made directly to other agency staff. This indicator captures the vast majority of calls made by the general public to the agency and primarily misses calls from other from other customers such as colleges and universities.
- 10. Responsible Person:** Contact Gus Wales, Division Director, Public Information and Communications Division, Phone: 225-922-2029, FAX: 225-922-0790, Email: gwales@osfa.la.gov.

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Strategic Plan 2008-2013

PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES PROGRAM

Objective: II.2

Indicator Name: Loan, Scholarship and Grant Program Public Education Activities

Indicator LaPAS PI Code: None

- 1. Type and Level:** Output/None
- 2. Rationale:** This indicator is used to monitor the agency's output and efficiency in educating the public, schools, guidance counselors, and others on the agency's programs through its outreach programs.
- 3. Use:** The indicator is used for internal management purposes.
- 4. Clarity:** The indicator examines the agency's outreach programs that educate the agency's customers and the public on the programs administered by the agency and the services provided.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records and documentation for the training sessions and outreach programs conducted during the state fiscal year.
- 7. Calculation Methodology:** The indicator sums the number of participants in a particular type of outreach program conducted by the agency.
- 8. Scope:** The data is disaggregated according to type of training conducted or numbers attending an outreach program.
- 9. Caveats:** This indicator reports the number of persons attending events sponsored by the agency. It is not one indicator but a series of indicators reporting the results of the agency's outreach programs.
- 10. Responsible Person:** Contact Gus Wales, Division Director, Public Information and Communications Division, Phone: 225-922-2029, FAX: 225-922-0790, Email: gwales@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES PROGRAM

Objective: II.3

Indicator Name: Expanding Customer Access

Indicator LaPAS PI Code: None

- 1. Type and Level:** Output/None
- 2. Rationale:** This indicator examines the agency's success in introducing new technology and developing new software enhancements to increase productivity and efficiency while also increasing customer access to agency information to facilitate business transactions and provide training. It also looks at increasing customer access to program information so the public can gain immediate information on their eligibility, application status, or payment status for programs administered by the agency. Improvements to the agency's website are the primary focus of this indicator.
- 3. Use:** The indicator is used for internal management purposes.
- 4. Clarity:** The indicator primarily examines the success of the agency in using technology to expand access for its internal and external customers to information in the agency's data systems. Its aim is to improve customer service by increasing productivity and efficiency while also allowing customers to gain immediate access to information concerning their status or eligibility.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records and documentation and is examined on a state fiscal year basis.
- 7. Calculation Methodology:** The indicator sums the number of improvements implemented during the state fiscal year.
- 8. Scope:** The indicator is aggregated for all improvements incorporated for all programs assigned to the agency.
- 9. Caveats:** This indicator reports the improvements incorporated by the Information Technology Division. It is not one indicator but a series of indicators reporting the results of their actions.
- 10. Responsible Person:** Contact Alice Thibodeaux, Division Director, Information Services Division, Phone: 225-922-1027, FAX: 225-922-1130, Email: athibodeaux@osfa.la.gov.

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Strategic Plan 2008-2013

PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES PROGRAM

Objective: II.4

Indicator Name: Development of Student Aid Programs

Indicator LaPAS PI Code: None

- 1. Type and Level:** Output/None
- 2. Rationale:** The agency has considerable experience administering student financial aid programs and has access to data and other information concerning these programs. The goal is to use this expertise to assist the Board of Regents in their development of student financial aid policies, plans and programs.
- 3. Use:** The indicator is used for internal management purposes.
- 4. Clarity:** This indicator examines the agency's efforts in assisting in the development of student financial aid policy, plans and programs.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records and documentation and is examined on a state fiscal year basis.
- 7. Calculation Methodology:** The indicator lists the efforts of the agency in assisting the Board of Regents in their development of student financial aid plans, policies and programs.
- 8. Scope:** The indicator is aggregated for all efforts to support student financial aid plan, policy or program development.
- 9. Caveats:** This indicator reports any actions taken to support Board of Regents initiatives in the student financial aid area.
- 10. Responsible Person:** Contact Richard Omdal, Policy/Planning Officer, Policy Section, Phone: 225-922-1043, FAX: 225-922-1429, Email: romdal@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES PROGRAM

Objective: II.5

Indicator Name: Student Tuition Assistance and Revenue Trust (START) Saving Program Public Education Activities

Indicator LaPAS PI Code: None

- 1. Type and Level:** Output/None
- 2. Rationale:** This indicator is used to monitor the agency's output and efficiency in educating parents, grandparents, the general public (both in-state and nationally), business and industry, financial advisors, and others on the START Saving Program through its outreach programs and advertising campaigns.
- 3. Use:** The indicator is used for internal management purposes.
- 4. Clarity:** The indicator examines the agency's outreach and advertising programs that educate the agency's customers and the public on the START Saving Program, which is an IRS Section 529 college savings program.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records and documentation for the outreach and advertising programs conducted by the agency and outside contractors during the state fiscal year.
- 7. Calculation Methodology:** The indicator sums the number of programs or advertising campaigns conducted and attempts to evaluate their efficiency in promoting the benefits of the state's START Saving Program.
- 8. Scope:** The data is disaggregated according to type of program or campaign used.
- 9. Caveats:** This indicator reports data on various activities associated with the promotion of the START Saving Program. It is not one indicator but a series of indicators reporting the results of the agency's outreach and advertising efforts.
- 10. Responsible Person:** Contact Gus Wales, Division Director, Public Information and Communications Division, Phone: 225-922-2029, FAX: 225-922-0790, Email: gwales@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES PROGRAM

Objective: III.1

Indicator Name: Acquisition of State Level Funding for State Programs

Indicator LaPAS PI Code: None

1. **Type and Level:** Input/None
2. **Rationale:** The agency is the administering agency for several legislatively approved state financial aid programs, including the tuition repayment plan for certain medical students, Teach Louisiana First, the guarantee of Nursing School Loans Program, and the loan forgiveness program for certain veterinary students specializing in food animals among other programs. These programs are currently unfunded. This indicator examines the success of the agency in securing funding for these programs.
3. **Use:** The indicator is used for internal management purposes.
4. **Clarity:** The indicator looks at the success of the agency in procuring funding for legislatively approved programs that are unfunded or partially funded. It does not include programs that are not legislatively approved.
5. **Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor.
6. **Data Source, Collection and Reporting:** The source of data is the agency's records and documentation concerning the individual programs.
7. **Calculation Methodology:** The indicator tracks the agency's efforts in securing funding for the individual programs.
8. **Scope:** The data is disaggregated by program.
9. **Caveats:** This indicator provides data on the success of obtaining program funding, but does not predict program success.
10. **Responsible Person:** Contact Mary Jane Lange, Accountant Administrator, Finance and Accounting Division, Phone: 225-922-1041, FAX: 225-922-0454, Email: mlange@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES PROGRAM

Objective: IV.1

Indicator Name: Number of audits planned to achieve compliance level

Indicator LaPAS PI Code: 13784

1. **Type and Level:** Output/Key
2. **Rationale:** Auditing is an essential function to ensure program participants (including agency staff) comply with applicable statutes, regulations and directives. This indicator tracks the Audit Division's performance.
3. **Use:** This measure is used to monitor the agency's progress and performance in conducting audits on schools, lenders, contractors and internal staff and evaluates whether the audited entities are complying with applicable statutes, regulations and directives. It is required to calculate an operating efficiency ratio. The indicator is reported for performance-based budgeting purposes.
4. **Clarity:** The indicator's name clearly defines what is being measured.
5. **Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
6. **Data Source, Collection and Reporting:** The source of data is the agency's records and documentation and is examined on a state fiscal year basis. The data is reported quarterly.
7. **Calculation Methodology:** The Audit Division, with the approval of the Louisiana Student Financial Aid Commission, uses standard auditing procedures and staff availability to determine the number of audits to be conducted during a state fiscal year.
8. **Scope:** All audits scheduled and/or conducted during the state fiscal year are aggregated into one indicator. The indicator can be broken down into type of audit.
9. **Caveats:** There are no caveats.
10. **Responsible Person:** Contact Kelvin Deloch, Audit Manager, Audit Division, Phone: 225-922-0585, FAX: 225-922-1130, Email: kdeloch@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES PROGRAM

Objective: IV.1

Indicator Name: Number of audits performed

Indicator LaPAS PI Code: 11333

- 1. Type and Level:** Output/Key
- 2. Rationale:** Auditing is an essential function to ensure program participants (including agency staff) comply with applicable statutes, regulations and directives. This indicator tracks the Audit Division's performance.
- 3. Use:** This measure is used to monitor the agency's progress and performance in conducting audits on schools, lenders, contractors and internal staff and evaluates whether the audited entities are complying with applicable statutes, regulations and directives. It is required to calculate an operating efficiency ratio. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The indicator's name clearly defines what is being measured.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records and documentation and is examined on a state fiscal year basis. The data is reported quarterly.
- 7. Calculation Methodology:** The indicator is the simple summation of audits completed during the reporting period.
- 8. Scope:** All audits scheduled and/or conducted during the state fiscal year are aggregated into one indicator. The indicator can be broken down into type of audit.
- 9. Caveats:** There are no caveats.
- 10. Responsible Person:** Contact Kelvin Deloch, Audit Manager, Audit Division, Phone: 225-922-0585, FAX: 225-922-1130, Email: kdeloch@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES PROGRAM

Objective: IV.1

Indicator Name: Compliance level determined by audits

Indicator LaPAS PI Code: 20371

1. **Type and Level:** Outcome/Key
2. **Rationale:** Auditing is an essential function to ensure program participants (including agency staff) comply with applicable statutes, regulations and directives. This indicator tracks the Audit Division's performance.
3. **Use:** This measure is used to monitor the agency's progress and performance in conducting audits on schools, lenders, contractors and internal staff and evaluates whether the audited entities are complying with applicable statutes, regulations and directives. The indicator is reported for performance-based budgeting purposes.
4. **Clarity:** The indicator is defined using standard auditing procedures to determine the level at which the audited entity complies with applicable statutes, regulations and directives.
5. **Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
6. **Data Source, Collection and Reporting:** The source of data is the agency's records and documentation and is examined on a state fiscal year basis. The data is reported quarterly.
7. **Calculation Methodology:** The Audit Division uses standard auditing procedures to determine a compliance level for each audit. This indicator averages the compliance level for all audits completed to date during the reporting period on a state fiscal year basis.
8. **Scope:** All audits scheduled and/or conducted during the state fiscal year are aggregated into one indicator. The indicator can be broken down into type of audit.
9. **Caveats:** There are no caveats.
10. **Responsible Person:** Contact Kelvin Deloch, Audit Manager, Audit Division, Phone: 225-922-0585, FAX: 225-922-1130, Email: kdeloch@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES PROGRAM

Objective: IV.1

Indicator Name: Percentage of planned audits performed

Indicator LaPAS PI Code: 13788

- 1. Type and Level:** Efficiency/Supporting
- 2. Rationale:** Auditing is an essential function to ensure program participants (including agency staff) comply with applicable statutes, regulations and directives. This indicator tracks the Audit Division's performance.
- 3. Use:** This measure is used to monitor the agency's progress and performance in conducting audits on schools, lenders, contractors and internal staff and evaluates whether the audited entities are complying with applicable statutes, regulations and directives. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The indicator's name clearly defines what is being measured.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records and documentation and is examined on a state fiscal year basis. The data is reported semi-annually.
- 7. Calculation Methodology:** This indicator uses a standard calculation that calculates an efficiency ratio by dividing the Number of audits planned to achieve compliance level (LaPAS PI Code 13784) by Number of audits performed (LaPAS PI Code 11333).
- 8. Scope:** All audits scheduled and/or conducted during the state fiscal year are aggregated into one indicator. The indicator can be broken down into type of audit.
- 9. Caveats:** There are no caveats.
- 10. Responsible Person:** Contact Kelvin Deloch, Audit Manager, Audit Division, Phone: 225-922-0585, FAX: 225-922-1130, Email: kdeloch@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES PROGRAM

Objective: V.1

Indicator Name: Human Resources Review

Indicator LaPAS PI Code: None

1. **Type and Level:** Outcome/None
2. **Rationale:** The agency's objective is to recruit, maintain and support a qualified, well trained workforce to manage and administer the federal and state student financial aid programs. To accomplish this objective, the agency is required to abide by a multitude of federal and state statutes, regulations and directives concerning its workforce. This indicator examines the agency's success in building a quality workforce while maintaining a 100% compliance rate with applicable statutes, regulations and directives.
3. **Use:** The indicator is used for internal management purposes to monitor the agency's progress in complying with applicable statutes, regulations and directives concerning its workforce while also building and retaining a quality and diverse workforce to accomplish the agency's mission and goals.
4. **Clarity:** This indicator primarily looks at the success of the agency's personnel management.
5. **Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. It includes the results of outside audits of the agency.
6. **Data Source, Collection and Reporting:** The source of data is the agency's records and documentation and the findings of any internal or external audits conducted during the state fiscal year. The data is examined on an as needed basis.
7. **Calculation Methodology:** The area involves several indicators that sum the number of actions in a particular area, such as: the number of audit findings reported during the year, the number of supervisor's with the required training, the number of Performance Planning and Review (PPR) documents completed on time.
8. **Scope:** The data is aggregated by area.
9. **Caveats:** There are no caveats.
10. **Responsible Person:** Contact Jason McCann, Human Resources Manager, Human Resources Division, Phone: 225-922-1035, FAX: 225-925-4517, Email: jmccann@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES PROGRAM

Objective: VI.1

Indicator Name: Maximization of Federal Operating Funds

Indicator LaPAS PI Code: None

1. Type and Level: Input/None

2. Rationale: The agency is primarily funded by federal funds derived through the agency's operations as a guarantor in the Federal Family Education Loan Program (FFELP). After operating expenses are deducted, any surplus revenues can be used to support student financial aid programs. In the past, these revenues have paid some of the administrative costs of the state's financial aid programs, relieving the state of that cost burden. Maximizing federal revenues increases funds available to support state financial aid programs.

3. Use: The indicator is used for internal management purposes to monitor the agency's success in maximizing federal revenues.

4. Clarity: The indicator's name clearly states the intent of the indicator.

5. Validity, Reliability and Accuracy: This indicator has not been audited by the Office of the Legislative Auditor.

6. Data Source, Collection and Reporting: The source of data is the agency's records, documentation, and financial records. It is collected on a Federal and State fiscal year basis and examined on an as needed basis.

7. Calculation Methodology: This indicator is the sum of Default Aversion Fees, Loan Processing and Issuance Fees, Account Maintenance Fees, Collections on Defaulted Loans, Interest Earnings, and other income that represents the total input of federal funds to the Agency Operating Fund.

8. Scope: This indicator is the aggregation of revenues from several sources into a total federal revenue source.

9. Caveats: Federal regulations limit the use of excess federal revenues to the support of student financial aid programs. The Louisiana Student Financial Assistance Commission is responsible for the determination of excess revenues.

10. Responsible Person: Contact Mary Jane Lange, Accountant Administrator, Finance and Accounting Division, Phone: 225-922-1041, FAX: 225-922-0454, Email: mlange@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES PROGRAM

Objective: VII.1

Indicator Name: Implement and maintain adequate controls

Indicator LaPAS PI Code: None

- 1. Type and Level:** Input and Output/None
- 2. Rationale:** The agency's operations and programs must strictly comply with applicable statutes, rules, guidance, directives, industry standards and ethical standards that are promulgated by several federal, state and other sources. In order to ensure compliance, the agency must implement and maintain controls that are sufficient to ensure compliance. In many cases, the agency must prepare and release to the public documents that report financial or other programmatic data to document agency activities or program performance.
- 3. Use:** The indicator is used for internal management purposes to monitor the agency's success in complying with applicable statutes, rules, guidance, directives, industry standards and ethical standards.
- 4. Clarity:** The indicator's name clearly states the intent of the indicator.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records. It is collected on a Federal and State fiscal year basis and examined on an as needed basis.
- 7. Calculation Methodology:** This indicator is a collective indicator to document the agency's activities to implement and maintain adequate controls to protect federal, state, and/or personal invested funds. As such, there is no one calculation method for this indicator, but a collection of many processes to develop and report financial and programmatic data.
- 8. Scope:** This indicator is the aggregation of data from several sources into several standardized reports.
- 9. Caveats:** There are no caveats.
- 10. Responsible Person:** Contact Jack Hart, Assistant Executive Director for Fiscal and Administrative Affairs, Phone: 225-922-1039, FAX: 225-922-0454, Email: jhart@osfa.la.gov.

LOAN OPERATIONS
PERFORMANCE INDICATOR MATRIX

PROGRAM OBJECTIVE	INPUTS	OUTPUTS	OUTCOMES	EFFICIENCY
OBJECTIVE I.1	Reserve fund balance Dollar value of outstanding loan guarantees	Reserve ratio – reserve fund balance/loan guarantees outstanding	Compliance with federal requirement	Regulatory compliance and management indicator of performance
OBJECTIVE II.1	Total FFELP loans originated by Louisiana’s schools during the federal fiscal year Total loans guaranteed by the agency for the corresponding federal fiscal year	Percentage of the total state FFELP loans that were guaranteed by the agency	The agency’s share of the total FFELP loans originated by Louisiana schools during federal fiscal year 2013 equals or exceeds 65%	Increased market share, greater revenue and greater cost efficiencies
OBJECTIVE II.2	Cumulative recoveries (in millions of dollars) Cumulative defaults (in millions of dollars)	Cumulative default recovery rate	Increase in dollars collected	A cumulative recovery rate of 85%, which minimizes outstanding defaults and increases revenues

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PERFORMANCE INDICATOR DOCUMENTATION

Program: LOAN OPERATIONS

Objective: I.1

Indicator Name: Reserve Ratio – reserve balance/loans outstanding

Indicator LaPAS PI Code: 4740

- 1. Type and Level:** Outcome/Key
- 2. Rationale:** The reserve ratio is the primary indicator of the fiscal health of the agency's administration of in regards to the Federal Family Education Loan Program (FFELP). It shows the success of the agency in maintaining the federally mandated minimum a reserve ratio of 0.25%, which is an indication the agency has sufficient funds on hand to cover the cost of paying lenders for defaulted student loans guaranteed by the agency.
- 3. Use:** The indicator is used to monitor the agency's compliance with the federal mandate to maintain a 0.25% reserve ratio and as an indicator of the financial health of the agency in regards to the Federal Family Education Loan Program (FFELP). The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Louisiana Office of Student Financial Assistance (LOSFA) is the state agency designated by the U.S. Department of Education to be the guarantor of loans that originate in Louisiana under the Federal Family Education Loan Program (FFELP). This includes Stafford Loans (subsidized and unsubsidized), Parent Loans for Undergraduate Students (PLUS) and Consolidation Loans. The guarantee is a service offered by the state that allows lenders to make loans to students at favorable interest rates without a credit check. In other words, the guarantee serves as a form of collateral.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data for this indicator is financial data reported in the state's Integrated Statewide Information Systems (ISIS) and required federal Forms 2000 reporting. This data is collected on a monthly basis for both the state and federal fiscal years for fiscal reporting purposes to the executive staff, Louisiana Student Financial Assistance Commission and federal Department of Education. The indicator is reported on a quarterly basis with current information.
- 7. Calculation Methodology:** The indicator is a simple ratio using a standard calculation of dividing Reserve fund cash balance (LaPAS PI Code 4741) by Loans outstanding (LaPAS PI Code 4742).
- 8. Scope:** The indicator reports a simple ratio using the total volume of loans guaranteed by the agency and the total balance of the funds in the agency's federal fund.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Jack Hart, Assistant Executive Director for Fiscal and Administrative Affairs, Phone: 225-922-1039, FAX: 225-922-0454, Email: jhart@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: LOAN OPERATIONS

Objective: I.1

Indicator Name: Reserve fund cash balance

Indicator LaPAS PI Code: 4741

- 1. Type and Level:** Input/Key
- 2. Rationale:** The reserve ratio is the primary indicator of the fiscal health of the agency's administration of in regards to the Federal Family Education Loan Program (FFELP). It shows the success of the agency in maintaining the federally mandated minimum a reserve ratio of 0.25%, which is an indication the agency has sufficient funds on hand to cover the cost of paying lenders for defaulted student loans guaranteed by the agency. This indicator is required to calculate the reserve ratio.
- 3. Use:** The agency uses the indicator to monitor the fiscal health of the agency as a federal guarantor, calculate a reserve ratio, and monitor the fund balance of the federal reserve fund. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Louisiana Office of Student Financial Assistance (LOSFA) is the state agency designated by the U.S. Department of Education to be the guarantor of loans that originate in Louisiana under the Federal Family Education Loan Program (FFELP). This includes Stafford Loans (subsidized and unsubsidized), Parent Loans for Undergraduate Students (PLUS) and Consolidation Loans. The guarantee is a service offered by the state that allows lenders to make loans to students at favorable interest rates without a credit check. In other words, the guarantee serves as a form of collateral. The reserve fund cash balance is the federal fund that is used to pay lenders for defaulted student loans guaranteed by the agency.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data for this indicator is financial data reported in the state's Integrated Statewide Information Systems (ISIS) and required federal Forms 2000 reporting. This data is collected on a monthly basis for both the state and federal fiscal years for fiscal reporting purposes to the executive staff, Louisiana Student Financial Assistance Commission and federal Department of Education. The indicator is reported on a quarterly basis with current information.
- 7. Calculation Methodology:** The indicator reports the current balance of the agency's federal reserve fund as calculated using data within the state's Integrated Statewide Information Systems (ISIS) as of the end of the reporting period.
- 8. Scope:** The indicator reports the agency's federal reserve fund balance.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Jack Hart, Assistant Executive Director for Fiscal and Administrative Affairs, Phone: 225-922-1039, FAX: 225-922-0454, Email: jhart@osfa.la.gov.

OFFICE OF STUDENT FINANCIAL ASSISTANCE

Strategic Plan 2008-2013

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOAN OPERATIONS

Objective: I.1

Indicator Name: Loans outstanding

Indicator LaPAS PI Code: 4742

- 1. Type and Level:** Output/Key
- 2. Rationale:** The reserve ratio is the primary indicator of the fiscal health of the agency's administration of in regards to the Federal Family Education Loan Program (FFELP). It shows the success of the agency in maintaining the federally mandated minimum a reserve ratio of 0.25%, which is an indication the agency has sufficient funds on hand to cover the cost of paying lenders for defaulted student loans guaranteed by the agency. This indicator is required to calculate the reserve ratio.
- 3. Use:** The agency uses the indicator to monitor success of the agency in attracting student loan business as a federal guarantor and calculate a reserve ratio. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Louisiana Office of Student Financial Assistance (LOSFA) is the state agency designated by the U.S. Department of Education to be the guarantor of loans that originate in Louisiana under the Federal Family Education Loan Program (FFELP). This includes Stafford Loans (subsidized and unsubsidized), Parent Loans for Undergraduate Students (PLUS) and Consolidation Loans. The guarantee is a service offered by the state that allows lenders to make loans to students at favorable interest rates without a credit check. The National Student Loan Data System (NSLDS) is the U.S. Department of Education's central database for student aid that receives data from schools, guarantee agencies, and other U.S. Department of Education programs. NSLDS provides a centralized, integrated view of Title IV loans and Pell grants that are tracked through their entire cycle; from aid approval through closure. This indicator is a measure of the total amount of loans that are guaranteed by the agency.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data for this indicator is the U. S. Department of Education's Forms 2000 report. This data is collected on a monthly basis for both the state and federal fiscal years for fiscal reporting purposes to the executive staff, Louisiana Student Financial Assistance Commission and federal Department of Education. The indicator is reported on a quarterly basis with current information.
- 7. Calculation Methodology:** The loans outstanding indicator uses information from the U. S. Department of Education's Forms data that reports the total balance of loans outstanding that are guaranteed by the agency. The dollar value reported is the current balance as of the end of the reporting period.
- 8. Scope:** The indicator reports the agency's current outstanding loan balance.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Jack Hart, Assistant Executive Director for Fiscal and Administrative Affairs, Phone: 225-922-1039, FAX: 225-922-0454, Email: jhart@osfa.la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

OFFICE OF STUDENT FINANCIAL ASSISTANCE

Strategic Plan 2008-2013

Program: LOAN OPERATIONS

Objective: I.1

Indicator Name: Annual default rate

Indicator LaPAS PI Code: 9711

- 1. Type and Level:** Outcome and Efficiency/Key
- 2. Rationale:** The annual default rate is an indicator of the health of the agency's portfolio of guaranteed loans. This rate is also used to determine the agency's reimbursement rate for reinsurance that has an impact on the agency's federal revenues.
- 3. Use:** This measure is used to monitor the rate at which borrowers are defaulting on student loans that are guaranteed by the agency. It is required for reporting purposes to the federal government and it is reported for performance-based budgeting purposes.
- 4. Clarity:** The Louisiana Office of Student Financial Assistance (LOSFA) is the state agency designated by the U.S. Department of Education to be the guarantor of loans that originate in Louisiana under the Federal Family Education Loan Program (FFELP). This includes Stafford Loans (subsidized and unsubsidized), Parent Loans for Undergraduate Students (PLUS) and Consolidation Loans. The guarantee is a service offered by the state that allows lenders to make loans to students at favorable interest rates without a credit check. In other words, the guarantee serves as a form of collateral.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source for this indicator is data generated by the agency's loan database that is also reported to the U. S. Department of Education through the Forms 2000 federal reporting process. This data is collected on a monthly basis for both the state and federal fiscal years for fiscal reporting purposes to the executive staff, Louisiana Student Financial Assistance Commission and U. S. Department of Education. The indicator is reported on a quarterly basis with current information.
- 7. Calculation Methodology:** The indicator is calculated using a standard calculation by dividing Annual default claims paid (LaPAS PI Code 4750) by Loans in repayment at end of prior federal fiscal year (LaPAS PI Code 4749).
- 8. Scope:** The indicator reports a simple ratio using the above calculation methodology.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Gwen Johnson, Claims Administrator, Claims Management Section, Loan Operations Division, Phone: 225-922-1073, FAX: 225-922-0611, Email: gjohnson@osfa.la.gov.

OFFICE OF STUDENT FINANCIAL ASSISTANCE

Strategic Plan 2008-2013

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOAN OPERATIONS

Objective: I.1

Indicator Name: Loans in repayment at end of prior federal fiscal year

Indicator LaPAS PI Code: 4749

- 1. Type and Level:** Efficiency/Supporting
- 2. Rationale:** This indicator reports the dollar value of all student loans guaranteed by the agency that have entered repayment status that require the borrower to repay the loan if the loan is not in a deferred status. It is used to calculate the annual default rate.
- 3. Use:** This measure is used to calculate the rate at which borrowers are defaulting on student loans that are guaranteed by the agency. It is required for reporting purposes to the federal government and it is reported for performance-based budgeting purposes.
- 4. Clarity:** The Louisiana Office of Student Financial Assistance (LOSFA) is the state agency designated by the U.S. Department of Education to be the guarantor of loans that originate in Louisiana under the Federal Family Education Loan Program (FFELP). This includes Stafford Loans (subsidized and unsubsidized), Parent Loans for Undergraduate Students (PLUS) and Consolidation Loans. The guarantee is a service offered by the state that allows lenders to make loans to students at favorable interest rates without a credit check. In other words, the guarantee serves as a form of collateral.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source for this indicator is data generated by the agency's loan database that is also reported to the U. S. Department of Education through the Forms 2000 federal reporting process. The indicator is reported on an annual basis for the federal fiscal year.
- 7. Calculation Methodology:** This indicator uses information from the agency's loan database that reports to the agency and federal government the total balance of student loans guaranteed by the agency that have entered repayment status. The dollar value reported is the current balance as of the end of the prior federal fiscal year.
- 8. Scope:** The dollar value reported is the current balance as of the end of the prior federal fiscal year for all loans guaranteed by the agency that have entered a repayment status.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Robert Pollage, Default Prevention Administrator, Default Prevention Section, Loan Operations Division, Phone: 225-922-1062, FAX: 225-922-0124, Email: rpollage@osfa.la.gov.

OFFICE OF STUDENT FINANCIAL ASSISTANCE

Strategic Plan 2008-2013

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOAN OPERATIONS

Objective: I.1

Indicator Name: Annual default claims paid

Indicator LaPAS PI Code: 4750

- 1. Type and Level:** Output/Supporting
- 2. Rationale:** Default claims paid is the amount that the agency has paid to lenders to repay loans guaranteed by the agency that have gone into a default status. These claims are paid from the agency's federal reserve fund.
- 3. Use:** The agency monitors this indicator to track expenditures from the agency's federal reserve fund and evaluate the fiscal health of the agency concerning FFELP.
- 4. Clarity:** The Louisiana Office of Student Financial Assistance (LOSFA) is the state agency designated by the U.S. Department of Education to be the guarantor of loans that originate in Louisiana under the Federal Family Education Loan Program (FFELP). This includes Stafford Loans (subsidized and unsubsidized), Parent Loans for Undergraduate Students (PLUS) and Consolidation Loans. The guarantee is a service offered by the state that allows lenders to make loans to students at favorable interest rates without a credit check. In other words, the guarantee serves as a form of collateral.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source for this indicator is data generated by the agency's loan database that is also reported to the U. S. Department of Education through the Forms 2000 federal reporting process. Agency documentation and records are used to track the data on a federal and state fiscal year basis. The indicator is reported semiannually on a state fiscal year basis.
- 7. Calculation Methodology:** This indicator uses information from the agency's loan database that reports to the agency and federal government the total claims paid for the month. The agency tracks the indicator on a state and federal fiscal year basis. The dollar value reported is the current balance as of the end of the prior federal fiscal year.
- 8. Scope:** The dollar value reported is the current cumulative value as of the end of the reporting period of all claims paid to date during the state fiscal year.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Gwen Johnson, Claims Administrator, Claims Management Section, Loan Operations Division, Phone: 225-922-1073, FAX: 225-922-0611, Email: gjohnson@osfa.la.gov.

OFFICE OF STUDENT FINANCIAL ASSISTANCE

Strategic Plan 2008-2013

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOAN OPERATIONS

Objective: II.1

Indicator Name: Net FFELP loan volume guaranteed by LOSFA

Indicator LaPAS PI Code: None

- 1. Type and Level:** Output/Supporting
- 2. Rationale:** This indicator reports the net amount of Federal Family Education Loan Program (FFELP) student loans that were guaranteed by the agency during the past federal fiscal year.
- 3. Use:** The agency monitors this indicator to track its guaranteed FFELP loan volume.
- 4. Clarity:** The indicator includes the total amount of Federal Family Education Loan Program (FFELP) student loans generated by the state's public and private colleges, and universities and proprietary schools that were guaranteed by the agency.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data for this indicator is an annual report prepared by the Federal Department of Education that reports data on federal student loans by state guarantee agencies.
- 7. Calculation Methodology:** The federal report shows the total amount of Federal Family Education Loan Program (FFELP) student loans generated by the state's schools by guaranty agency. The indicator is the sum of all loans guaranteed by the agency.
- 8. Scope:** The data is disaggregated by guarantee agency for every FFELP student loan in Louisiana. The total is an aggregate of all FFELP student loans in the state guaranteed by the agency.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Richard Omdal, Policy/Planning Officer, Policy Section, Phone: 225-922-1043, FAX: 225-922-1429, Email: romdal@osfa.la.gov.

OFFICE OF STUDENT FINANCIAL ASSISTANCE

Strategic Plan 2008-2013

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOAN OPERATIONS

Objective: II.2

Indicator Name: Cumulative Default Recovery Rate

Indicator LaPAS PI Code: 13359

- 1. Type and Level:** Efficiency/Key
- 2. Rationale:** The primary revenue source for the agency is the federal revenue generated through the default recovery process that encourages borrowers to make payments on defaulted student loans. This indicator measures the efficiency of the agency in this area.
- 3. Use:** The indicator is used to evaluate the agency's success in collecting on defaulted student loans. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Louisiana Office of Student Financial Assistance (LOSFA) is the state agency designated by the U.S. Department of Education to be the guarantor of loans that originate in Louisiana under the Federal Family Education Loan Program (FFELP). This includes Stafford Loans (subsidized and unsubsidized), Parent Loans for Undergraduate Students (PLUS) and Consolidation Loans. The guarantee is a service offered by the state that allows lenders to make loans to students at favorable interest rates without a credit check. In other words, the guarantee serves as a form of collateral.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source for this indicator is data generated by the agency's loan database that is also reported to the U. S. Department of Education through the Forms 2000 federal reporting process. Agency documentation and records are used to track the data on a federal and state fiscal year basis. The indicator is reported quarterly on a state fiscal year basis.
- 7. Calculation Methodology:** This indicator is calculated using a standard calculation by dividing Cumulative recoveries (LaPAS PI Code 13360) by Cumulative Defaults (LaPAS PI Code 13361).
- 8. Scope:** The indicator is a simple ratio calculated by the above methodology.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Byron Henderson, Default Recoveries Administrator, Default Recoveries Section, Loan Operations Division, Phone: 225-922-1125, FAX: 225-922-1117, Email: bhenderson@osfa.la.gov.

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Strategic Plan 2008-2013

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOAN OPERATIONS

Objective: II.2

Indicator Name: Cumulative Defaults

Indicator LaPAS PI Code: 13361

- 1. Type and Level:** Input and Outcome/Supporting
- 2. Rationale:** The primary revenue source for the agency is the federal revenue generated through the default recovery process that encourages borrowers to make payments on defaulted student loans. This indicator shows the size of the pool from which the agency can generate funding through default recovery activities. It is required to calculate the Default Recovery Rate.
- 3. Use:** The indicator is used to monitor the agency's Default Recoveries Section workload and is required to evaluate the agency's success in collecting on defaulted student loans. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Louisiana Office of Student Financial Assistance (LOSFA) is the state agency designated by the U.S. Department of Education to be the guarantor of loans that originate in Louisiana under the Federal Family Education Loan Program (FFELP). This includes Stafford Loans (subsidized and unsubsidized), Parent Loans for Undergraduate Students (PLUS) and Consolidation Loans. The guarantee is a service offered by the state that allows lenders to make loans to students at favorable interest rates without a credit check. In other words, the guarantee serves as a form of collateral.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source for this indicator is data generated by the agency's loan database that is also reported to the U. S. Department of Education through the Forms 2000 federal reporting process. Agency documentation and records are used to track the data on a federal and state fiscal year basis. The indicator is reported semiannually on a state fiscal year basis.
- 7. Calculation Methodology:** This indicator uses information from the agency's loan database that reports to the agency and federal government the cumulative defaults. The agency tracks the indicator on a state and federal fiscal year basis. The dollar value reported is the current cumulative balance as of the end of the reporting period on a state fiscal year basis.
- 8. Scope:** The indicator reports the cumulative total for the state fiscal year for all defaults of loans within the agency's portfolio.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Byron Henderson, Default Recoveries Administrator, Default Recoveries Section, Loan Operations Division, Phone: 225-922-1125, FAX: 225-922-1117, Email: bhenderson@osfa.la.gov.

OFFICE OF STUDENT FINANCIAL ASSISTANCE

Strategic Plan 2008-2013

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOAN OPERATIONS

Objective: II.2

Indicator Name: Cumulative recoveries

Indicator LaPAS PI Code: 13360

- 1. Type and Level:** Output/Supporting
- 2. Rationale:** The primary revenue source for the agency is the federal revenue generated through the default recovery process that encourages borrowers to make payments on defaulted student loans. This indicator shows the success of the agency's default recovery activities in collecting on defaulted student loans. It is required to calculate the Default Recovery Rate.
- 3. Use:** The indicator is used to monitor the agency's Default Recoveries Section workload and is required to evaluate the agency's success in collecting on defaulted student loans. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Louisiana Office of Student Financial Assistance (LOSFA) is the state agency designated by the U.S. Department of Education to be the guarantor of loans that originate in Louisiana under the Federal Family Education Loan Program (FFELP). This includes Stafford Loans (subsidized and unsubsidized), Parent Loans for Undergraduate Students (PLUS) and Consolidation Loans. The guarantee is a service offered by the state that allows lenders to make loans to students at favorable interest rates without a credit check. In other words, the guarantee serves as a form of collateral.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source for this indicator is data generated by the agency's loan database that is also reported to the U. S. Department of Education through the Forms 2000 federal reporting process. Agency documentation and records are used to track the data on a federal and state fiscal year basis. The indicator is reported semiannually on a state fiscal year basis.
- 7. Calculation Methodology:** This indicator uses information from the agency's loan database that reports to the agency and federal government the cumulative recoveries. The agency tracks the indicator on a state and federal fiscal year basis. The dollar value reported is the current cumulative balance as of the end of the reporting period on a state fiscal year basis.
- 8. Scope:** The indicator reports the cumulative total for the state fiscal year for all recoveries on loans within the agency's portfolio of defaulted loans.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Byron Henderson, Default Recoveries Administrator, Default Recoveries Section, Loan Operations Division, Phone: 225-922-1125, FAX: 225-922-1117, Email: bhenderson@osfa.la.gov.

OFFICE OF STUDENT FINANCIAL ASSISTANCE

Strategic Plan 2008-2013

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOAN OPERATIONS

Objective: II.2

Indicator Name: Annual recoveries of defaulted loans

Indicator LaPAS PI Code: 13854

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The primary revenue source for the agency is the federal revenue generated through the default recovery process that encourages borrowers to make payments on defaulted student loans. This indicator shows the success of the agency's default recovery activities in collecting on defaulted student loans.
- 3. Use:** The indicator is used to monitor the agency's Default Recoveries Section workload and report to decision makers the agency's success in collecting on defaulted student loans. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Louisiana Office of Student Financial Assistance (LOSFA) is the state agency designated by the U.S. Department of Education to be the guarantor of loans that originate in Louisiana under the Federal Family Education Loan Program (FFELP). This includes Stafford Loans (subsidized and unsubsidized), Parent Loans for Undergraduate Students (PLUS) and Consolidation Loans. The guarantee is a service offered by the state that allows lenders to make loans to students at favorable interest rates without a credit check. In other words, the guarantee serves as a form of collateral.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source for this indicator is data generated by the agency's loan database that is also reported to the U. S. Department of Education through the Forms 2000 federal reporting process. Agency documentation and records are used to track the data on a federal and state fiscal year basis. The indicator is reported semiannually on a state fiscal year basis.
- 7. Calculation Methodology:** The indicator sums all recoveries collected and reports the total recoveries for the prior state fiscal year.
- 8. Scope:** The indicator reports the cumulative total for the prior state fiscal year for all recoveries on loans within the agency's portfolio of defaulted loans.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Byron Henderson, Default Recoveries Administrator, Default Recoveries Section, Loan Operations Division, Phone: 225-922-1125, FAX: 225-922-1117, Email: bhenderson@osfa.la.gov.

OFFICE OF STUDENT FINANCIAL ASSISTANCE
Strategic Plan 2008-2013

SCHOLARSHIP, GRANT AND SAVING PROGRAM DIVISION

PERFORMANCE INDICATOR MATRIX

PROGRAM OBJECTIVE	INPUTS	OUTPUTS	OUTCOMES	EFFICIENCY
OBJECTIVE I.1	Budget for administrative costs for the State Fiscal Year	Dollar value of state scholarship and grant program awards and START Saving Fund	Minimize program costs to maximize funding available to program participants	Ratio of administrative costs to dollar value of scholarship and grant programs and START Saving Fund less than 4%
OBJECTIVE I.2	Number of account owners and dollar value of principal deposits	Number of account owners and dollar value of principal deposits START Savings Fund Disbursements	Encourages family planning for postsecondary educational expenses; reduces reliance on student loans and increases college going rate	Ability to attract investors and maximize their investments
OBJECTIVE I.3	State general funds appropriated by program for scholarships, grants and incentives for postsecondary education	State general funds paid out by program for scholarships, grants and incentives for postsecondary education	Make postsecondary education affordable for students Increase access for Louisiana residents to postsecondary education Increase the number of students receiving postsecondary educations	Maximize the number of students receiving postsecondary educations at the lowest cost to the state

OFFICE OF STUDENT FINANCIAL ASSISTANCE

Strategic Plan 2008-2013

PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.1

Indicator Name: Administrative costs of Scholarship, Grant and START Saving Program

Indicator LaPAS PI Code: 17091

- 1. Type and Level:** Output/Supporting
- 2. Rationale:** Administrative costs are an essential part of conducting business. Objective I.1 provides a goal to limit administrative costs to less than 4% of the agency's total disbursements of scholarship and grant awards and Student Tuition Assistance and Revenue Trust (START) Saving Program deposits. Administrative costs include the total cost of labor; materials; facilities; equipment; and fees allocated to general administrative or overhead functions for the Scholarship and Grant and START Divisions that directly administer and oversee the agency's scholarship and grant programs and manage the START deposits.
- 3. Use:** This measure is used to monitor the agency's administrative costs for the Scholarship and Grant Division and START Division and evaluate if these costs remain consistent with the agency's disbursements of scholarships and grants and management of START deposits. It is required to calculate an operating efficiency ratio. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The indicator name clearly identifies what is being measured.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data for this indicator is financial data reported in the state's Integrated Statewide Information Systems (ISIS). This data is reported on a state fiscal year basis and is reviewed daily. The indicator is reported on a semi-annual basis with current information.
- 7. Calculation Methodology:** The indication is calculated by adding the expenditures to date for the agency activities contained in the Scholarship, Grant, and Saving Program portion of the agency's budget.
- 8. Scope:** The indicator is an aggregation of the program expenditures for the activities contained in the Scholarship, Grant and Saving Program portion of the agency's budget.
- 9. Caveats:** This indicator looks at administrative costs for two divisions in the agency and not the administrative costs for the entire agency.
- 10. Responsible Person:** Contact Mary Jane Lange, Accountant Administrator, Finance and Accounting Division, Phone: 225-922-1041, FAX: 225-922-0454, Email: mlange@osfa.la.gov.

OFFICE OF STUDENT FINANCIAL ASSISTANCE

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.1

Indicator Name: Total Scholarship/Grant and TOPS awards and START contributions

Indicator LaPAS PI Code: 20960

- 1. Type and Level:** Output/Supporting
- 2. Rationale:** Administrative costs are an essential part of conducting business. Objective I.1 provides a goal to limit administrative costs to less than 4% of the agency's total disbursements of scholarship and grant awards and Student Tuition Assistance and Revenue Trust (START) Saving Program deposits. This indicator reports the current value of the disbursements by the agency for scholarships and grants, prorated over the fiscal year, and includes the current value of the principal deposits in the START Saving Program.
- 3. Use:** This measure is used to monitor the agency's administrative costs for the Scholarship and Grant and START Divisions and evaluate if these costs remain consistent with the agency's budget. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The indicator is used to show the relationship between the agency's administrative costs and the scholarships and grants disbursed combined with START assets managed, not the agency's total expenditures. The START contributions portion of the indicator is the total START principal deposits (LaPAS PI Code 4778) to the state's 529 College Savings Plan, the Student Tuition Assistance and Revenue Trust (START) Saving Program.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of scholarship and grant expenditure data for this indicator is financial data reported in the state's Integrated Statewide Information Systems (ISIS). The budget data is prorated and reported semi-annually on a state fiscal year basis. The START data is the total START principal deposits indicator (LaPAS PI Code 4778).
- 7. Calculation Methodology:** The indicator is a simple calculation by adding the current expenditures for scholarships and grants and the total START principal deposits indicator (LaPAS PI Code 4778).
- 8. Scope:** The scholarship and grant expenditure data is aggregated by adding the expenditures for the scholarship and grant programs administered by the agency, such as the Taylor Opportunity Program for Students (TOPS), Rockefeller State Wildlife Scholarship, Louisiana GO Grant, and others.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Mary Jane Lange, Accountant Administrator, Finance and Accounting Division, Phone: 225-922-1041, FAX: 225-922-0454, Email: mlange@osfa.la.gov.

OFFICE OF STUDENT FINANCIAL ASSISTANCE

Strategic Plan 2008-2013

PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.1

Indicator Name: Percentage of Scholarship/Grant administrative expenses to awards and START Saving fund assets managed

Indicator LaPAS PI Code: 20961

- 1. Type and Level:** Efficiency/Supporting
- 2. Rationale:** Administrative costs are an essential part of conducting business and Objective I.1 sets as a goal the limiting of these costs to less than 4% of the agency's total disbursements of scholarship and grant awards and Student Tuition Assistance and Revenue Trust (START) Saving Program deposits. This indicator shows the success of the agency in controlling the administrative costs associated with the administration and management of the START Program and scholarship and grant programs and their operating efficiency.
- 3. Use:** This measure is used to monitor the agency's Scholarship and Grant and START Divisions' administrative costs and evaluate if these costs remain consistent with the agency's disbursement of scholarships and grants and management of START assets. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The indicator shows the relationship between the agency's Scholarship and Grant and START Divisions' administrative costs and its disbursement of scholarships and grants and START contributions, not the agency's total expenditures. The START contributions portion of the indicator is the total principal deposits (LaPAS PI Code 4778) to the state's 529 College Savings Plan, the Student Tuition Assistance and Revenue Trust (START) Saving Program.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of the data to perform the calculation is documented in the description for the Administrative costs of Scholarship, Grant and START Saving Program (LaPAS PI Code 17091) and the Total Scholarship/Grant and TOPS awards and START contributions (LaPAS PI Code 20960) indicators.
- 7. Calculation Methodology:** This indicator is determined by a standard calculation of dividing the Administrative costs of Scholarship, Grant and START Saving Program (LaPAS PI Code 17091) by the Total Scholarship/Grant and TOPS awards and START contributions (LaPAS PI Code 20960) indicators.
- 8. Scope:** The indicator is a simple calculation using two other defined agency indicators.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Mary Jane Lange, Accountant Administrator, Finance and Accounting Division, Phone: 225-922-1041, FAX: 225-922-0454, Email: mlange@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.1

Indicator Name: Administrative costs of S/G Program and START Program

Indicator LaPAS PI Code: 17091

1. **Type and Level:** Output/General Performance Indicator
2. **Rationale:** Administrative costs are an essential part of conducting business. Objective I.1 provides a goal to limit administrative costs to less than 4% of the agency's total disbursements of scholarship and grant awards and Student Tuition Assistance and Revenue Trust (START) Saving Program deposits. These costs include the total cost of labor; materials; facilities; equipment; and fees allocated to general administrative or overhead functions for the Scholarship and Grant and START Divisions that directly administer and oversee the agency's scholarship and grant programs and manage the START deposits.
3. **Use:** This indicator is no longer used but it is still reported for performance-based budgeting purposes.
4. **Clarity:** The indicator name clearly identifies what is being measured.
5. **Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
6. **Data Source, Collection and Reporting:** The source of data for this indicator is financial data reported in the state's Integrated Statewide Information Systems (ISIS). This data is reported on a state fiscal year basis and is reviewed daily. The indicator is reported on a semi-annual basis with current information.
7. **Calculation Methodology:** The indication is calculated by adding the expenditures to date for the agency activities contained in the Scholarship, Grant, and Saving Program portion of the agency's budget.
8. **Scope:** The indicator is an aggregation of the program expenditures for the activities contained in the Scholarship, Grant and Saving Program portion of the agency's budget.
9. **Caveats:** This indicator looks at administrative costs for two divisions in the agency and not the administrative costs for the entire agency.
10. **Responsible Person:** Contact Mary Jane Lange, Accountant Administrator, Finance and Accounting Division, Phone: 225-922-1041, FAX: 225-922-0454, Email: mlange@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.1

Indicator Name: Total S/G and START awards

Indicator LaPAS PI Code: 20981

1. **Type and Level:** Output/General Performance Indicator
2. **Rationale:** Administrative costs are an essential part of conducting business. Objective I.1 provides a goal to limit administrative costs to less than 4% of the agency's total disbursements of scholarship and grant awards and Student Tuition Assistance and Revenue Trust (START) Saving Program deposits. This indicator reports the current value of the disbursements by the agency for scholarships and grants, prorated over the fiscal year, and it was replaced by Total Scholarship/Grant and TOPS awards and START contributions (LaPAS PI Code 20960) that added the current value of the principal deposits in the START Saving Program to the indicator.
3. **Use:** This indicator is no longer used but it is still reported for performance-based budgeting purposes.
4. **Clarity:** The indicator name clearly identifies what is being measured.
5. **Validity, Reliability and Accuracy:** The indicator was replaced because it did not include the START deposits.
6. **Data Source, Collection and Reporting:** The source of data for this indicator is financial data reported in the state's Integrated Statewide Information Systems (ISIS). This data is reported on a state fiscal year basis and is reviewed daily. The indicator is reported on a semi-annual basis with current information.
7. **Calculation Methodology:** The indicator is a simple calculation by adding the current expenditures for scholarships and grants and the total START principal deposits indicator (LaPAS PI Code 4778).
8. **Scope:** The scholarship and grant expenditure data is aggregated by adding the expenditures for the scholarship and grant programs administered by the agency, such as the Taylor Opportunity Program for Students (TOPS), Rockefeller State Wildlife Scholarship, Louisiana GO Grant, and others.
9. **Caveats:** There are no caveats for this indicator.
10. **Responsible Person:** Contact Mary Jane Lange, Accountant Administrator, Finance and Accounting Division, Phone: 225-922-1041, FAX: 225-922-0454, Email: mlange@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.1

Indicator Name: Percentage of S/G and START administrative costs to awards

Indicator LaPAS PI Code: 17092

- 1. Type and Level:** Efficiency/General Performance Indicator
- 2. Rationale:** Administrative costs are an essential part of conducting business. Objective I.1 provides a goal to limit administrative costs to less than 4% of the agency's total disbursements of scholarship and grant awards and Student Tuition Assistance and Revenue Trust (START) Saving Program deposits. This indicator reports the current value of the disbursements by the agency for scholarships and grants, prorated over the fiscal year, and it was replaced by Percentage of Scholarship/Grant administrative expenses to awards and START Saving fund assets managed (LaPAS PI Code 20961) that added the current value of the principal deposits in the START Saving Program to the indicator.
- 3. Use:** This indicator is no longer used but it is still reported for performance-based budgeting purposes.
- 4. Clarity:** The indicator is used to show the relationship between the agency's Scholarship and Grant and START Divisions' administrative costs and the scholarships and grants disbursed, not the agency's total expenditures. Although it includes the administrative costs for the START Division, it does not include the START assets managed by that division.
- 5. Validity, Reliability and Accuracy:** The indicator was replaced because it did not include the START deposits.
- 6. Data Source, Collection and Reporting:** The source of data for this indicator is financial data reported in the state's Integrated Statewide Information Systems (ISIS). This data is reported on a state fiscal year basis and is reviewed daily. The indicator is reported on a semi-annual basis with current information.
- 7. Calculation Methodology:** The indicator is calculated using a standard calculation of dividing Administrative costs of S/G Program and START Program (LaPAS PI Code 17091) by Total S/G and START awards (LaPAS PI Code 20981).
- 8. Scope:** The scholarship and grant expenditure data is aggregated by adding the expenditures for the scholarship and grant programs administered by the agency, such as the Taylor Opportunity Program for Students (TOPS), Rockefeller State Wildlife Scholarship, Louisiana GO Grant, and others. The administrative cost data is an aggregation of the program expenditures for the activities contained in the Scholarship, Grant and Saving Program portion of the agency's budget.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Mary Jane Lange, Accountant Administrator, Finance and Accounting Division, Phone: 225-922-1041, FAX: 225-922-0454, Email: mlange@osfa.la.gov.

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Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.2

Indicator Name: Number of Account Owners

Indicator LaPAS PI Code: 4776

- 1. Type and Level:** Output/Key
- 2. Rationale:** This indicator tracks the number of accounts that have been opened in the Student Tuition Assistance and Revenue Trust (START) Saving Program (the state's IRS Section 529 college savings plan).
- 3. Use:** The indicator is used to track the growth of the START Savings Program and evaluate the success of the agency in attracting investors to save for future postsecondary education expenses. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The START Saving Program is a college savings plan, which is a "Qualified Tuition Plan" under Section 529 of the Internal Revenue Code. It is an innovative college savings plan designed to help families contend with the growing costs of educating their children after high school.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records. It is collected on a State fiscal year and calendar year basis and examined on an as needed basis. The data is reported quarterly.
- 7. Calculation Methodology:** The indicator is the sum of all active START Savings Program accounts. One account with multiple owners is considered as one owner.
- 8. Scope:** The indicator is aggregated and counts the number of active accounts in the program, regardless of investment option chosen. The data can be disaggregated by investment option, type of account, and income level of the account owner.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Carol Fulco, START Administrator, START Division, Phone: 225-922-3281, FAX: 225-922-1488, Email: cfulco@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.2

Indicator Name: Principal Deposits

Indicator LaPAS PI Code: 4778

1. **Type and Level:** Output/Key
2. **Rationale:** This indicator tracks the total dollar value of the principal deposits invested in the Student Tuition Assistance and Revenue Trust (START) Saving Program (the state's IRS Section 529 college savings plan).
3. **Use:** The indicator is used to track the growth of the START Savings Program and evaluate the success of the agency in attracting investors to save for future postsecondary education expenses. The indicator is reported for performance-based budgeting purposes.
4. **Clarity:** The START Saving Program is a college savings plan, which is a "Qualified Tuition Plan" under Section 529 of the Internal Revenue Code. It is an innovative college savings plan designed to help families contend with the growing costs of educating their children after high school.
5. **Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
6. **Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records. It is collected on a State fiscal year and calendar year basis and examined on an as needed basis. The data is reported quarterly.
7. **Calculation Methodology:** The indicator is the sum of all funds invested in START Savings Program accounts.
8. **Scope:** The indicator is aggregated and sums the total amount invested in the program, regardless of investment option chosen. The data can be disaggregated by investment option, type of account, and income level of the account owner.
9. **Caveats:** There are no caveats for this indicator.
10. **Responsible Person:** Contact Carol Fulco, START Administrator, START Division, Phone: 225-922-3281, FAX: 225-922-1488, Email: cfulco@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.2

Indicator Name: START Savings Fund disbursements

Indicator LaPAS PI Code: New

1. **Type and Level:** Output/General Performance Indicator
2. **Rationale:** This indicator tracks the total disbursements for a state fiscal year from the START Savings Program.
3. **Use:** The indicator is used to track the growth in START Savings Program disbursements to monitor the workload of the START Program Staff as the program matures. The indicator is reported for performance-based budgeting purposes.
4. **Clarity:** The START Saving Program is a college savings plan, which is a “Qualified Tuition Plan” under Section 529 of the Internal Revenue Code. It is an innovative college savings plan designed to help families contend with the growing costs of educating their children after high school.
5. **Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
6. **Data Source, Collection and Reporting:** The source of data is the agency’s records, documentation, and financial records. It is collected on a State fiscal year and calendar year basis and examined on an as needed basis. The data is reported annually.
7. **Calculation Methodology:** The indicator is the sum of all disbursements from START Savings accounts.
8. **Scope:** The indicator is aggregated and sums the total amount disbursed for any purpose from the START Savings Program accounts. The data can be disaggregated by type of disbursement.
9. **Caveats:** There are no caveats for this indicator.
10. **Responsible Person:** Contact Carol Fulco, START Administrator, START Division, Phone: 225-922-3281, FAX: 225-922-1488, Email: cfulco@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Number of recipients: LEAP

Indicator LaPAS PI Code: 11383

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the Leveraging Educational Assistance Partnership (LEAP) program, including the Special Leveraging Educational Assistance Partnership (SLEAP) program that will be replaced by the Grants for Access and Persistence (GAP) in 2011-2012, and track its usage and the expenditure of appropriated funds to support the program. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** Leveraging Educational Assistance Partnership (LEAP) and the Special Leveraging Educational Assistance Partnership (SLEAP) that will be replaced by the Grants for Access and Persistence (GAP) in 2011-2012 are federal programs that provides need-based grants to academically qualified students. It uses state funds as a match to attain federal funding. LEAP replaced the prior federal State Student Incentive Grant (SSIG) program.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records. Schools receive the funding from the agency and report back how they disbursed the funds with the number of recipients. It is collected on a semester or term basis and reported semi-annually as an end-of-year report for the state fiscal year.
- 7. Calculation Methodology:** The indicator sums the total number of recipients who received LEAP and SLEAP funds as reported by the schools.
- 8. Scope:** The data is aggregated from reports received from individual schools that received and disbursed LEAP and SLEAP funding.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Total Appropriated: LEAP

Indicator LaPAS PI Code: 20965

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the Leveraging Educational Assistance Partnership (LEAP), including the Special Leveraging Educational Assistance Partnership (SLEAP) program that will be replaced by the Grants for Access and Persistence (GAP) in 2011-2012 program, and track its usage and the expenditure of appropriated funds to support the program. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** Leveraging Educational Assistance Partnership (LEAP) and the Special Leveraging Educational Assistance Partnership (SLEAP) that will be replaced by the Grants for Access and Persistence (GAP) in 2011-2012 are federal programs that provide need-based grants to academically qualified students. It uses state funds as a match to attain federal funding. LEAP replaced the prior federal State Student Incentive Grant (SSIG) program.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records. Schools receive the funding from the agency and report back how they disbursed the funds with the number of recipients. It is collected on a semester or term basis and reported semi-annually as an end-of-year report for the state fiscal year.
- 7. Calculation Methodology:** The indicator reports the amount of funding appropriated for the program and includes any budget adjustments that may occur.
- 8. Scope:** The indicator simply reports the current appropriated funding level.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Total Awarded: LEAP

Indicator LaPAS PI Code: 11421

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency uses the indicator to monitor the Leveraging Educational Assistance Partnership (LEAP) program, including the Special Leveraging Educational Assistance Partnership (SLEAP) program that will be replaced by the Grants for Access and Persistence (GAP) in 2011-2012, and track its usage and the expenditure of appropriated funds to support the program. The indicator is reported for performance-based budgeting purposes.
- 3. Use:** The agency uses the indicator to monitor the Leveraging Educational Assistance Partnership (LEAP) program and track its usage and the expenditure of appropriated funds to support the program. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** Leveraging Educational Assistance Partnership (LEAP) and the Special Leveraging Educational Assistance Partnership (SLEAP) that will be replaced by the Grants for Access and Persistence (GAP) in 2011-2012 are federal programs that provide need-based grants to academically qualified students. It uses state funds as a match to attain federal funding. LEAP replaced the prior federal State Student Incentive Grant (SSIG) program.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records. Schools receive the funding from the agency and report back how they disbursed the funds with the number of recipients. It is collected on a semester or term basis and reported semi-annually as an end-of-year report for the state fiscal year.
- 7. Calculation Methodology:** The indicator sums the total number of dollars disbursed to recipients who received LEAP and SLEAP funds as reported by the schools.
- 8. Scope:** The data is aggregated from reports received from individual schools that received and disbursed LEAP and SLEAP funding.
- 9. Caveats:** Late refunds of allocated funds by a school may preclude the agency from reallocating the funds to another school in time to be disbursed for that state fiscal year.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Average Amount Awarded: LEAP

Indicator LaPAS PI Code: 11390

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the Leveraging Educational Assistance Partnership (LEAP) program, including the Special Leveraging Educational Assistance Partnership (SLEAP) program that will be replaced by the Grants for Access and Persistence (GAP) in 2011-2012, and track its usage and the expenditure of appropriated funds to support the program. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** Leveraging Educational Assistance Partnership (LEAP) and the Special Leveraging Educational Assistance Partnership (SLEAP) that will be replaced by the Grants for Access and Persistence (GAP) in 2011-2012 are federal programs that provide need-based grants to academically qualified students. It uses state funds as a match to attain federal funding. LEAP replaced the prior federal State Student Incentive Grant (SSIG) program.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records. Schools receive the funding from the agency and report back how they disbursed the funds with the number of recipients. It is collected on a semester or term basis and reported semi-annually as an end-of-year report for the state fiscal year.
- 7. Calculation Methodology:** The indicator is calculated using a standard calculation of dividing the Total Awarded: LEAP (LaPAS PI Code 11421) by the Number of recipients: LEAP (LaPAS PI Code 11383).
- 8. Scope:** The data on number of recipients and amount awarded is aggregated from reports received from individual schools that received and disbursed LEAP and SLEAP funding.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Number of recipients: Rockefeller

Indicator LaPAS PI Code: 11386

1. **Type and Level:** Output/General Performance Indicator
2. **Rationale:** The agency provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
3. **Use:** The agency uses the indicator to monitor the status of the Rockefeller State Wildlife Scholarship Program and track its usage and the expenditure of appropriated funds to support the program. The indicator is reported for performance-based budgeting purposes.
4. **Clarity:** The Rockefeller State Wildlife Scholarship Program is a competitive scholarship awarded to high school graduates, college undergraduates and graduate students majoring in forestry, wildlife or marine science. Recipients must attain a degree in one of the three eligible fields at a Louisiana public college/university or repay the funds, plus interest.
5. **Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
6. **Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records. It is collected on a semester or term basis by school and reported semi-annually as an end-of-year report for the state fiscal year.
7. **Calculation Methodology:** The indicator sums the total number of recipients who received Rockefeller funds during the academic year.
8. **Scope:** The data is aggregated from agency records and financial information that shows the number of recipients by schools that received Rockefeller funding.
9. **Caveats:** There are no caveats for this indicator.
10. **Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Total Appropriated: Rockefeller

Indicator LaPAS PI Code: 20970

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the status of the Rockefeller State Wildlife Scholarship Program and track its usage and the expenditure of appropriated funds to support the program. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Rockefeller State Wildlife Scholarship Program is a competitive scholarship awarded to high school graduates, college undergraduates and graduate students majoring in forestry, wildlife or marine science. Recipients must attain a degree in one of the three eligible fields at a Louisiana public college/university or repay the funds, plus interest.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records. It is collected on a semester or term basis by school and reported semi-annually as an end-of-year report for the state fiscal year.
- 7. Calculation Methodology:** The indicator reports the amount of funding appropriated for the program and includes any budget adjustments that may occur.
- 8. Scope:** The indicator simply reports the current appropriated funding level.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Total Awarded: Rockefeller

Indicator LaPAS PI Code: 11424

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the status of the Rockefeller State Wildlife Scholarship Program and track its usage and the expenditure of appropriated funds to support the program. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Rockefeller State Wildlife Scholarship Program is a competitive scholarship awarded to high school graduates, college undergraduates and graduate students majoring in forestry, wildlife or marine science. Recipients must attain a degree in one of the three eligible fields at a Louisiana public college/university or repay the funds, plus interest.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records. It is collected on a semester or term basis by school and reported semi-annually as an end-of-year report for the state fiscal year.
- 7. Calculation Methodology:** The indicator sums the total number of dollars disbursed to recipients who received Rockefeller funds during the academic year.
- 8. Scope:** The data is aggregated from agency records and financial information that shows the dollars disbursed by schools that received Rockefeller funding.
- 9. Caveats:** Late refunds of allocated funds by a school may preclude the agency from reallocating the funds to another student in time to be disbursed for that state fiscal year.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Average Amount Awarded: Rockefeller

Indicator LaPAS PI Code: 11393

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the status of the Rockefeller State Wildlife Scholarship Program and track its usage and the expenditure of appropriated funds to support the program. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Rockefeller State Wildlife Scholarship Program is a competitive scholarship awarded to high school graduates, college undergraduates and graduate students majoring in forestry, wildlife or marine science. Recipients must attain a degree in one of the three eligible fields at a Louisiana public college/university or repay the funds, plus interest.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records. It is collected on a semester or term basis by school and reported semi-annually as an end-of-year report for the state fiscal year.
- 7. Calculation Methodology:** The indicator is calculated using a standard calculation of dividing the Total Awarded: Rockefeller (LaPAS PI Code 11424) by the Number of recipients: Rockefeller (LaPAS PI Code 11386).
- 8. Scope:** The data on number of recipients and amount awarded is aggregated from reports received from individual schools that received and disbursed Rockefeller funding.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Number of recipients: Teach LA First

Indicator LaPAS PI Code: 20972

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the status of the Teach Louisiana First Program and track the expenditure of appropriations for this program. The program has not been funded or implemented. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Teach Louisiana First Program is designed to reduce the shortage of teachers in low-performing public schools by providing financial incentives to teachers who are certified in certain core subjects to teach in these schools.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records. It is collected on a semi-annual basis and reported semi-annually as an end-of-year report for the state fiscal year.
- 7. Calculation Methodology:** The indicator sums the total number of recipients who received Teach Louisiana First payments during the state fiscal year.
- 8. Scope:** The data on number of recipients and amount awarded is aggregated from data collected from local school systems.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Total Appropriated: Teach LA First

Indicator LaPAS PI Code: 20973

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the status of the Teach Louisiana First Program and track the expenditure of appropriations for this program. The program has not been funded or implemented. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Teach Louisiana First Program is designed to reduce the shortage of teachers in low-performing public schools by providing financial incentives to teachers who are certified in certain core subjects to teach in these schools.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records. It is collected on a semi-annual basis and reported semi-annually as an end-of-year report for the state fiscal year.
- 7. Calculation Methodology:** The indicator reports the amount of funding appropriated for the program and includes any budget adjustments that may occur.
- 8. Scope:** The indicator simply reports the current appropriated funding level.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Total Awarded: Teach LA First

Indicator LaPAS PI Code: 20974

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the status of the Teach Louisiana First Program and track the expenditure of appropriations for this program. The program has not been funded or implemented. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Teach Louisiana First Program is designed to reduce the shortage of teachers in low-performing public schools by providing financial incentives to teachers who are certified in certain core subjects to teach in these schools.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records. It is collected on a semi-annual basis and reported semi-annually as an end-of-year report for the state fiscal year.
- 7. Calculation Methodology:** The indicator sums the total number of dollars disbursed to recipients who received Teach Louisiana First payments during the state fiscal year.
- 8. Scope:** The data on number of recipients and amount awarded is aggregated from data collected from local school systems.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Average Amount Awarded: Teach LA First

Indicator LaPAS PI Code: 20975

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the status of the Teach Louisiana First Program and track the expenditure of appropriations for this program. The program has not been funded or implemented. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Teach Louisiana First Program is designed to reduce the shortage of teachers in low-performing public schools by providing financial incentives to teachers who are certified in certain core subjects to teach in these schools.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records. It is collected on a semi-annual basis and reported semi-annually as an end-of-year report for the state fiscal year.
- 7. Calculation Methodology:** The indicator is calculated using a standard calculation of dividing the Total Awarded: Teach LA First (LaPAS PI Code 20974) by the Number of recipients: Teach LA First (LaPAS PI Code 20972).
- 8. Scope:** The data on number of recipients and amount awarded is aggregated from data collected from local school systems.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Number of recipients: GO Youth

Indicator LaPAS PI Code: New

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the status of the Grant Opportunity for Youth ChalleNGe Skills Training Program and track the expenditure of appropriations for this program. The program has not been funded in recent years. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Grant Opportunity for Youth ChalleNGe Skills Training Program provided funding to assist those students who graduate from the Louisiana National Guard's Youth ChalleNGe Program to continue their education and enhance employment opportunities by providing tuition to pursue postsecondary skill or occupational training, including a vocational technical education certificate or diploma or a nonacademic undergraduate degree at an eligible Louisiana postsecondary institution.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records. It is collected on a semi-annual basis and reported semi-annually as an end-of-year report for the state fiscal year.
- 7. Calculation Methodology:** The indicator sums the total number of recipients who received Teach Louisiana First payments during the state fiscal year.
- 8. Scope:** The data on number of recipients and amount awarded is aggregated from data collected from colleges and universities who enroll GO Youth recipients.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Total Appropriated: GO Youth

Indicator LaPAS PI Code: New

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the status of the Grant Opportunity for Youth ChalleNGe Skills Training Program and track the expenditure of appropriations for this program. The program has not been funded in recent years. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Grant Opportunity for Youth ChalleNGe Skills Training Program provided funding to assist those students who graduate from the Louisiana National Guard's Youth ChalleNGe Program to continue their education and enhance employment opportunities by providing tuition to pursue postsecondary skill or occupational training, including a vocational technical education certificate or diploma or a nonacademic undergraduate degree at an eligible Louisiana postsecondary institution.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records. It is collected on a semi-annual basis and reported semi-annually as an end-of-year report for the state fiscal year.
- 7. Calculation Methodology:** The indicator reports the amount of funding appropriated for the program and includes any budget adjustments that may occur.
- 8. Scope:** The indicator simply reports the current appropriated funding level.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Total Awarded: GO Youth

Indicator LaPAS PI Code: New

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the status of the Grant Opportunity for Youth ChalleNGe Skills Training Program and track the expenditure of appropriations for this program. The program has not been funded in recent years. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Grant Opportunity for Youth ChalleNGe Skills Training Program provided funding to assist those students who graduate from the Louisiana National Guard's Youth ChalleNGe Program to continue their education and enhance employment opportunities by providing tuition to pursue postsecondary skill or occupational training, including a vocational technical education certificate or diploma or a nonacademic undergraduate degree at an eligible Louisiana postsecondary institution.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records. It is collected on a semi-annual basis and reported semi-annually as an end-of-year report for the state fiscal year.
- 7. Calculation Methodology:** The indicator sums the total number of dollars disbursed to schools for students awarded a GO Youth grant under this program during the state fiscal year.
- 8. Scope:** The data on number of recipients and amount awarded is aggregated from data collected from colleges and universities who enroll GO Youth recipients.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Average Amount Awarded: GO Youth

Indicator LaPAS PI Code: New

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the status of the Grant Opportunity for Youth ChalleNGe Skills Training Program and track the expenditure of appropriations for this program. The program has not been funded in recent years. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Grant Opportunity for Youth ChalleNGe Skills Training Program provides funding to assist those students who graduate from the Louisiana National Guard's Youth ChalleNGe Program to continue their education and enhance employment opportunities by providing tuition at an eligible Louisiana postsecondary institution. The program may be used to pursue postsecondary skill or occupational training, including a vocational technical education certificate or diploma or a nonacademic undergraduate degree.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records. It is collected on a semi-annual basis and reported semi-annually as an end-of-year report for the state fiscal year.
- 7. Calculation Methodology:** The indicator is calculated using a standard calculation of dividing the Total Awarded: GO Youth (LaPAS PI Code New) by the Number of recipients: GO Youth (LaPAS PI Code New).
- 8. Scope:** The data on number of recipients and amount awarded is aggregated from data collected from colleges and universities who enroll GO Youth recipients.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Total distributed: Need-based Aid Program

Indicator LaPAS PI Code: 20976

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency is primarily funded by federal funds derived through the agency's operations as a guarantor in the Federal Family Education Loan Program (FFELP). After operating expenses are deducted, any surplus revenues can be used to support student financial aid programs. One such use is need based aid and this indicator provides general data on the distribution of such aid if it becomes available to show the usage and general status of this program to decision makers.
- 3. Use:** The agency uses the indicator to monitor the distribution of funding for the agency's need based aid program. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** This indicator shows the distribution of need based aid to Louisiana colleges and universities from funds generated by the agency as excess federal funds through the agency's operations as a guarantor in the Federal Family Education Loan Program (FFELP). The indicator does not include any other programs that receive federal or state funding for need based aid such as Louisiana GO Grant or the Leveraging Educational Assistance Partnership (LEAP) programs.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records and it is gathered from data submitted from colleges and universities that are allocated funding under this need based aid program. It is collected on a semi-annual basis and reported semi-annually as an end-of-year report for the state fiscal year.
- 7. Calculation Methodology:** The indicator sums the total number of dollars disbursed to schools for students awarded a grant under this need based aid program during the state fiscal year.
- 8. Scope:** The data is aggregated from information submitted by colleges and universities that are allocated funding under this need-based aid program.
- 9. Caveats:** Colleges and universities allocated funding under this need based aid program are generally responsible for selecting eligible students and determining the size of a grant while following general guidelines issued by the agency.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Institution Distribution to 4-Year Public: Need-Based Aid Program

Indicator LaPAS PI Code: 20977

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency is primarily funded by federal funds derived through the agency's operations as a guarantor in the Federal Family Education Loan Program (FFELP). After operating expenses are deducted, any surplus revenues can be used to support student financial aid programs. One such use is need based aid and this indicator provides general data on the distribution of such aid if it becomes available to show the usage and general status of this program to decision makers.
- 3. Use:** The agency uses the indicator to monitor the distribution of funding for the agency's need based aid program. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** This indicator shows the distribution of need based aid to Louisiana colleges and universities from funds generated by the agency as excess federal funds through the agency's operations as a guarantor in the Federal Family Education Loan Program (FFELP). The indicator does not include any other programs that receive federal or state funding for need based aid such as Louisiana GO Grant or the Leveraging Educational Assistance Partnership (LEAP) programs.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records and it is gathered from data submitted from colleges and universities that are allocated funding under this need based aid program. It is collected on a semi-annual basis and reported semi-annually as an end-of-year report for the state fiscal year.
- 7. Calculation Methodology:** The indicator sums the total number of dollars disbursed to four year public colleges and universities for students awarded a grant under this need based aid program during the state fiscal year.
- 8. Scope:** The data is aggregated from information submitted by four year public colleges and universities that are allocated funding under this need-based aid program.
- 9. Caveats:** Colleges and universities allocated funding under this need based aid program are generally responsible for selecting eligible students and determining the size of a grant while following general guidelines issued by the agency.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Institution Distribution to 4-Year Private: Need-Based Aid Program

Indicator LaPAS PI Code: 20978

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency is primarily funded by federal funds derived through the agency's operations as a guarantor in the Federal Family Education Loan Program (FFELP). After operating expenses are deducted, any surplus revenues can be used to support student financial aid programs. One such use is need based aid and this indicator provides general data on the distribution of such aid if it becomes available to show the usage and general status of this program to decision makers.
- 3. Use:** The agency uses the indicator to monitor the distribution of funding for the agency's need based aid program. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** This indicator shows the distribution of need based aid to Louisiana colleges and universities from funds generated by the agency as excess federal funds through the agency's operations as a guarantor in the Federal Family Education Loan Program (FFELP). The indicator does not include any other programs that receive federal or state funding for need based aid such as Louisiana GO Grant or the Leveraging Educational Assistance Partnership (LEAP) programs.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records and it is gathered from data submitted from colleges and universities that are allocated funding under this need based aid program. It is collected on a semi-annual basis and reported semi-annually as an end-of-year report for the state fiscal year.
- 7. Calculation Methodology:** The indicator sums the total number of dollars disbursed to four year private colleges and universities for students awarded a grant under this need based aid program during the state fiscal year.
- 8. Scope:** The data is aggregated from information submitted by four year private colleges and universities that are allocated funding under this need-based aid program.
- 9. Caveats:** Colleges and universities allocated funding under this need based aid program are generally responsible for selecting eligible students and determining the size of a grant while following general guidelines issued by the agency.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Institution Distribution to 2-Year Public: Need-Based Aid Program

Indicator LaPAS PI Code: 20979

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency is primarily funded by federal funds derived through the agency's operations as a guarantor in the Federal Family Education Loan Program (FFELP). After operating expenses are deducted, any surplus revenues can be used to support student financial aid programs. One such use is need based aid and this indicator provides general data on the distribution of such aid if it becomes available to show the usage and general status of this program to decision makers.
- 3. Use:** The agency uses the indicator to monitor the distribution of funding for the agency's need based aid program. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** This indicator shows the distribution of need based aid to Louisiana colleges and universities from funds generated by the agency as excess federal funds through the agency's operations as a guarantor in the Federal Family Education Loan Program (FFELP). The indicator does not include any other programs that receive federal or state funding for need based aid such as Louisiana GO Grant or the Leveraging Educational Assistance Partnership (LEAP) programs.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records and it is gathered from data submitted from colleges and universities that are allocated funding under this need based aid program. It is collected on a semi-annual basis and reported semi-annually as an end-of-year report for the state fiscal year.
- 7. Calculation Methodology:** The indicator sums the total number of dollars disbursed to two year public colleges for students awarded a grant under this need based aid program during the state fiscal year.
- 8. Scope:** The data is aggregated from information submitted by two year public colleges that are allocated funding under this need-based aid program.
- 9. Caveats:** Colleges and universities allocated funding under this need based aid program are generally responsible for selecting eligible students and determining the size of a grant while following general guidelines issued by the agency.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Institution Distribution to Technical College: Need-Based Aid Program

Indicator LaPAS PI Code: 20980

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency is primarily funded by federal funds derived through the agency's operations as a guarantor in the Federal Family Education Loan Program (FFELP). After operating expenses are deducted, any surplus revenues can be used to support student financial aid programs. One such use is need based aid and this indicator provides general data on the distribution of such aid if it becomes available to show the usage and general status of this program to decision makers.
- 3. Use:** The agency uses the indicator to monitor the distribution of funding for the agency's need based aid program. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** This indicator shows the distribution of need based aid to Louisiana colleges and universities from funds generated by the agency as excess federal funds through the agency's operations as a guarantor in the Federal Family Education Loan Program (FFELP). The indicator does not include any other programs that receive federal or state funding for need based aid such as Louisiana GO Grant or the Leveraging Educational Assistance Partnership (LEAP) programs.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records and it is gathered from data submitted from colleges and universities that are allocated funding under this need based aid program. It is collected on a semi-annual basis and reported semi-annually as an end-of-year report for the state fiscal year.
- 7. Calculation Methodology:** The indicator sums the total number of dollars disbursed to technical colleges for students awarded a grant under this need based aid program during the state fiscal year.
- 8. Scope:** The data is aggregated from information submitted by technical colleges that are allocated funding under this need-based aid program.
- 9. Caveats:** Colleges and universities allocated funding under this need based aid program are generally responsible for selecting eligible students and determining the size of a grant while following general guidelines issued by the agency.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Louisiana GO Grant recipients

Indicator LaPAS PI Code: 22245

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the Louisiana GO Grant program and track its usage and the expenditure of appropriated funds to support the program. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Louisiana GO Grant program provides a need-based component to the state's financial aid plan to support nontraditional and low to moderate-income students who need additional aid to afford the cost of attending college in Louisiana.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records and it is gathered from data submitted from colleges and universities that bill the agency for students who are eligible to receive funding under the Louisiana GO Grant need based aid program. It is collected on a weekly basis and reported semi-annually as an end-of-year report for the state fiscal year.
- 7. Calculation Methodology:** The indicator sums the total number of recipients who received Louisiana GO Grant payments during the state fiscal year.
- 8. Scope:** The data on number of recipients and amount awarded is aggregated from data collected from colleges and universities who receive Louisiana GO Grant funding for eligible students.
- 9. Caveats:** The colleges and universities make the determination of student eligibility for a Louisiana GO Grant under general guidelines issued by the agency.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Total Appropriated: Louisiana GO Grants

Indicator LaPAS PI Code: 22246

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the Louisiana GO Grant program and track its usage and the expenditure of appropriated funds to support the program. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Louisiana GO Grant program provides a need-based component to the state's financial aid plan to support nontraditional and low to moderate-income students who need additional aid to afford the cost of attending college in Louisiana.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records and it is gathered from data submitted from colleges and universities that bill the agency for students who are eligible to receive funding under the Louisiana GO Grant need based aid program. It is collected on a weekly basis and reported semi-annually as an end-of-year report for the state fiscal year.
- 7. Calculation Methodology:** The indicator reports the amount of funding appropriated for the program and includes any budget adjustments that may occur.
- 8. Scope:** The indicator simply reports the current appropriated funding level.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Total Awarded: Louisiana GO Grants

Indicator LaPAS PI Code: 22247

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the Louisiana GO Grant program and track its usage and the expenditure of appropriated funds to support the program. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Louisiana GO Grant program provides a need-based component to the state's financial aid plan to support nontraditional and low to moderate-income students who need additional aid to afford the cost of attending college in Louisiana.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records and it is gathered from data submitted from colleges and universities that bill the agency for students who are eligible to receive funding under the Louisiana GO Grant need based aid program. It is collected on a weekly basis and reported semi-annually as an end-of-year report for the state fiscal year.
- 7. Calculation Methodology:** The indicator sums the total dollars expended for Louisiana GO Grants during the state fiscal year.
- 8. Scope:** The data on dollars expended is aggregated from data collected from colleges and universities who receive Louisiana GO Grant funding for eligible students.
- 9. Caveats:** The colleges and universities make the determination of student eligibility for a Louisiana GO Grant under general guidelines issued by the agency.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Louisiana GO Grant Average Award

Indicator LaPAS PI Code: 22248

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the Louisiana GO Grant program and track its usage and the expenditure of appropriated funds to support the program. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Louisiana GO Grant program provides a need-based component to the state's financial aid plan to support nontraditional and low to moderate-income students who need additional aid to afford the cost of attending college in Louisiana.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records and it is gathered from data submitted from colleges and universities that bill the agency for students who are eligible to receive funding under the Louisiana GO Grant need based aid program. It is collected on a weekly basis and reported semi-annually as an end-of-year report for the state fiscal year.
- 7. Calculation Methodology:** The indicator is calculated using a standard calculation of dividing the Total Awarded: Louisiana GO Grants (LaPAS PI Code New) by the Louisiana GO Grant recipients (LaPAS PI Code New).
- 8. Scope:** The data on number of recipients and amount awarded is aggregated from data collected from colleges and universities who receive Louisiana GO Grant funding for eligible students. The award level is dependent on the enrollment status of the student, such as full-time, half-time or less than half-time student, and this has an impact on the average award calculation.
- 9. Caveats:** The colleges and universities make the determination of student eligibility for a Louisiana GO Grant under general guidelines issued by the agency.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Louisiana Early Start recipients

Indicator LaPAS PI Code: 22249

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the Louisiana Early Start program and track its usage and the expenditure of appropriated funds to support the program. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Louisiana Early Start Program provides funding to eligible Louisiana public colleges and universities to enroll 11th and 12th grade Louisiana public high school students in appropriate postsecondary coursework.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records and it is gathered from data submitted from colleges and universities that bill the agency for students who are eligible to receive funding under the Louisiana Early Start program. It is collected on a Semester/Quarter basis and reported semi-annually as an end-of-year report for the state fiscal year.
- 7. Calculation Methodology:** The indicator sums the total number of recipients who received Louisiana Early Start payments during the state fiscal year.
- 8. Scope:** The data on number of recipients and amount awarded is aggregated from data collected from colleges and universities who receive Louisiana Early Start funding for eligible students.
- 9. Caveats:** The colleges and universities make the determination of student eligibility for a Louisiana Early Start Grant under general guidelines issued by the agency.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Total Appropriated: Early Start

Indicator LaPAS PI Code: 22250

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the Louisiana Early Start program and track its usage and the expenditure of appropriated funds to support the program. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Louisiana Early Start Program provides funding to eligible Louisiana public colleges and universities to enroll 11th and 12th grade Louisiana public high school students in appropriate postsecondary coursework.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The indicator reports the amount of funding appropriated for the program and includes any budget adjustments that may occur.
- 7. Calculation Methodology:** The indicator reports the amount of funding appropriated for the program and includes any budget adjustments that may occur.
- 8. Scope:** The indicator simply reports the current appropriated funding level.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Total Awarded: Early Start

Indicator LaPAS PI Code: 22251

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the Louisiana Early Start program and track its usage and the expenditure of appropriated funds to support the program. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Louisiana Early Start Program provides funding to eligible Louisiana public colleges and universities to enroll 11th and 12th grade Louisiana public high school students in appropriate postsecondary coursework.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records and it is gathered from data submitted from colleges and universities that bill the agency for students who are eligible to receive funding under the Louisiana Early Start program. It is collected on a Semester/Quarter basis and reported semi-annually as an end-of-year report for the state fiscal year.
- 7. Calculation Methodology:** The indicator sums the total dollars expended for students who received Louisiana Early Start payments during the state fiscal year.
- 8. Scope:** The data on number of recipients and amount awarded is aggregated from data collected from colleges and universities who receive Louisiana Early Start funding for eligible students.
- 9. Caveats:** The colleges and universities make the determination of student eligibility for a Louisiana Early Start Grant under general guidelines issued by the agency.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-925-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING PROGRAM

Objective: I.3

Indicator Name: Early Start Average Award

Indicator LaPAS PI Code: 22252

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The agency provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the Louisiana Early Start program and track its usage and the expenditure of appropriated funds to support the program. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Louisiana Early Start Program provides funding to eligible Louisiana public colleges and universities to enroll 11th and 12th grade Louisiana public high school students in appropriate postsecondary coursework.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's records, documentation, and financial records and it is gathered from data submitted from colleges and universities that bill the agency for students who are eligible to receive funding under the Louisiana Early Start program. It is collected on a Semester/Quarter basis and reported semi-annually as an end-of-year report for the state fiscal year.
- 7. Calculation Methodology:** The indicator is calculated using a standard calculation of dividing the Total Awarded: Louisiana Early Start (LaPAS PI Code New) by the Louisiana Early Start recipients (LaPAS PI Code New).
- 8. Scope:** The data on number of recipients and amount awarded is aggregated from data collected from colleges and universities who receive Louisiana Early Start funding for eligible students.
- 9. Caveats:** The colleges and universities make the determination of student eligibility for a Louisiana Early Start Grant under general guidelines issued by the agency.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-922-4969, Email: blavergne@osfa.la.gov.

TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

PERFORMANCE INDICATOR MATRIX

PROGRAM OBJECTIVE	INPUTS	OUTPUTS	OUTCOMES	EFFICIENCY
OBJECTIVE I.1	Number of Louisiana high school graduates in most recent class Number of students applying for a TOPS award each application year	Number of applicants processed	Percentage of participation of most recent graduates Percentage of applicants processed from total records received Percentage change in participation of most recent high school graduates	Process 97% of applicants no later than September 1 st of their application year
OBJECTIVE I.2	Date of receipt of billing request Date billing request verified and all errors corrected	Date of submitting payment request to the State Treasurer	Submission of payment request to State Treasurer within 10 days of receipt of accurate billing request	Payment request to State Treasurer within 10 days after receipt of accurate bill

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.1

Indicator Name: Total amount awarded

Indicator LaPAS PI Code: 8423

- 1. Type and Level:** Output/Key
- 2. Rationale:** This indicator tracks the amount in dollars expended on the state's Taylor Opportunity Program for Students (TOPS) merit based scholarship program.
- 3. Use:** This measure is used to monitor the agency's expenditures for the TOPS scholarship and evaluate if these costs remain consistent with the current agency's budget and to develop a fiscal projection for future years. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Taylor Opportunity Program for Students (TOPS) is a state funded merit based scholarship program that provides tuition and, if eligible, stipend payments to eligible postsecondary students attending Louisiana public colleges and universities and Louisiana private schools that are members of the Louisiana Association of Independent Colleges and Universities (LAICU).
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported. However, the TOPS data is volatile and changes weekly as new billing requests are processed and refunds are returned.
- 6. Data Source, Collection and Reporting:** The source of data for this indicator is financial data reported in the state's Integrated Statewide Information Systems (ISIS). This data is reported on a state fiscal year basis and is reviewed daily. The indicator is reported on a quarterly basis with current information.
- 7. Calculation Methodology:** The indicator is the sum of all payments made to colleges and universities in support of the TOPS scholarship.
- 8. Scope:** The data is aggregated and includes all payments made in the current state fiscal year, including any payments due for student attendance in prior state fiscal years and refunds from both the current and past state fiscal years.
- 9. Caveats:** The TOPS data is volatile and changes weekly as new billing requests are processed and refunds are returned.
- 10. Responsible Person:** Contact Mary Jane Lange, Accountant Administrator, Finance and Accounting Division, Phone: 225-922-1041, FAX: 225-922-0454, Email: mlange@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.1

Indicator Name: Total number of award recipients

Indicator LaPAS PI Code: 8412

1. Type and Level: Input/Key

2. Rationale: This indicator tracks the number of students receiving an award under the state's Taylor Opportunity Program for Students (TOPS) merit based scholarship program.

3. Use: This measure is used to monitor the number of students receiving the TOPS scholarship and to develop a fiscal projection for future years. The indicator is reported for performance-based budgeting purposes.

4. Clarity: The Taylor Opportunity Program for Students (TOPS) is a state funded merit based scholarship program that provides tuition and, if eligible, stipend payments to eligible postsecondary students attending Louisiana public colleges and universities and Louisiana private schools that are members of the Louisiana Association of Independent Colleges and Universities (LAICU).

5. Validity, Reliability and Accuracy: This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported. However, the TOPS data is volatile and changes weekly as new billing requests are processed and refunds are returned.

6. Data Source, Collection and Reporting: The source of data is the agency's database, records, documentation, and financial records and it is gathered from data submitted from colleges and universities that bill the agency for students who are eligible to receive funding under the TOPS scholarship. It is collected on a weekly basis and reported quarterly for the state fiscal year.

7. Calculation Methodology: The agency's database tracks payments to schools on behalf of TOPS eligible students. The indicator sums the number of students that a school has billed for at least one payment during the state fiscal year and may include payments for prior academic years attendance.

8. Scope: The data is aggregated for all students for whom a school has billed the agency at least once during the state fiscal year.

9. Caveats: The TOPS data is volatile and changes weekly as new billing requests are processed and refunds are returned.

10. Responsible Person: Contact Mary Jane Lange, Accountant Administrator, Finance and Accounting Division, Phone: 225-922-1041, FAX: 225-922-0454, Email: mlange@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.1

Indicator Name: Number of (high school) graduates who applied for TOPS

Indicator LaPAS PI Code: 20379

- 1. Type and Level:** Input/Supporting
- 2. Rationale:** This indicator provides an estimate for the number of students applying for a TOPS scholarship and provides a workload estimate of the number of students that must be screened for TOPS eligibility.
- 3. Use:** The indicator is used to estimate the agency's workload in screening students for a TOPS award and to calculate an operating efficiency in determining TOPS eligibility prior to September 1st. It is used for performance-based budgeting purposes.
- 4. Clarity:** The Taylor Opportunity Program for Students (TOPS) is a state funded merit based scholarship program that provides tuition and, if eligible, stipend payments to eligible postsecondary students attending Louisiana public colleges and universities and Louisiana private schools that are members of the Louisiana Association of Independent Colleges and Universities (LAICU). Students apply for TOPS by taking the ACT and/or SAT and by submitting either a Free Application for Federal Student Aid (FAFSA) or an On-Line application. The FAFSA is the federal application for federal student aid programs. Students who are not eligible for federal grant aid can use the On-Line application.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is an estimate of the number of TOPS applicants, but it is considered a relatively good estimate of the size of the pool of applicants for a TOPS award.
- 6. Data Source, Collection and Reporting:** The source of data to estimate the indicator is the agency's database of FAFSA applications On-Line applications, ACT and/or SAT data, and student records. It is examined on a weekly basis and reported semi-annually for the state fiscal year.
- 7. Calculation Methodology:** The indicator is estimated by summing the number of students who have a graduation date within the prior academic year (high school) on which the agency has received a FAFSA or On-Line Application and subtracting from that sum the number of students with incomplete or invalid ACT and academic records that prevent the agency from making an initial eligibility determination.
- 8. Scope:** The data is aggregated from information in the agency's database.
- 9. Caveats:** Students may either apply indirectly for a TOPS scholarship by filing a FAFSA or directly by filing an On-Line application and by taking the ACT and/or SAT. The agency uses the students' graduation date and ACT score data to arrive at a proxy for this indicator.
- 10. Responsible Person:** Contact Susan Bohall, Initial Eligibility Section Supervisor, Scholarship and Grant Division, Phone: 225-922-1149, FAX: 225-925-4969, Email: sbohall@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.1

Indicator Name: Number of applicants whose eligibility was determined by September 1st

Indicator LaPAS PI Code: 20380

- 1. Type and Level:** Output/Supporting
- 2. Rationale:** Objective I.1 establishes an agency goal to determine the TOPS eligibility of 97% of all applicants by September 1st of each application year. This indicator reports the number of students that were determined eligible or ineligible for a TOPS award by the deadline. This deadline is significant since it occurs just before the date at which the schools can first start billing the agency for TOPS awards for the Fall Semester/Quarter.
- 3. Use:** The indicator is used to show the agency's actual performance in screening students for a TOPS award and to calculate an operating efficiency in determining TOPS eligibility prior to September 1st. It is used for performance-based budgeting purposes.
- 4. Clarity:** The Taylor Opportunity Program for Students (TOPS) is a state funded merit based scholarship program that provides tuition and, if eligible, stipend payments to eligible postsecondary students attending Louisiana public colleges and universities and Louisiana private schools that are members of the Louisiana Association of Independent Colleges and Universities (LAICU). Students apply for TOPS by taking the ACT and/or SAT and by submitting either a Free Application for Federal Student Aid (FAFSA) or an On-Line application. The FAFSA is the federal application for federal student aid programs. Students who are not eligible for federal grant aid can use the On-Line application.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid and is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's database that contains student records populated with information primarily drawn from the federal processor for FAFSA application or On-Line application data, ACT and/or SAT for ACT scores, and the Louisiana Department of Education's Student Transcript System for graduation, grade and course completion data. It is examined on a weekly basis and reported semi-annually for the state fiscal year.
- 7. Calculation Methodology:** The indicator is the sum of the number of students determined eligible and ineligible for a TOPS award by the September 1st deadline.
- 8. Scope:** The data is aggregated on a statewide basis and includes public and private high school graduates, home study students, and out of state and out of country graduates who are eligible through Louisiana residency. The data can be disaggregated by high school and/or parish.
- 9. Caveats:** The determination of eligibility for some students can be delayed due to missing, incomplete or inaccurate information that is beyond the agency's control.
- 10. Responsible Person:** Contact Susan Bohall, Initial Eligibility Section Supervisor, Scholarship and Grant Division, Phone: 225-922-1149, FAX: 225-925-4969, Email: sbohall@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.1

Indicator Name: Percentage of applicants whose eligibility was determined by September 1st

Indicator LaPAS PI Code: 20378

- 1. Type and Level:** Efficiency/Key
- 2. Rationale:** Objective I.1 establishes an agency goal to determine the TOPS eligibility of 97% of all applicants by September 1st of each application year. This indicator indicates the success of the agency in attaining that goal. This deadline is significant since it occurs just before the date at which the schools can first start billing the agency for TOPS awards for the Fall Semester/Quarter.
- 3. Use:** The indicator is used to show the agency's efficiency in screening students for a TOPS award and determining eligibility prior to the September 1st deadline. It is used for performance-based budgeting purposes.
- 4. Clarity:** The Taylor Opportunity Program for Students (TOPS) is a state funded merit based scholarship program that provides tuition and, if eligible, stipend payments to eligible postsecondary students attending Louisiana public colleges and universities and Louisiana private schools that are members of the Louisiana Association of Independent Colleges and Universities (LAICU). Students apply for TOPS by taking the ACT and/or SAT and by submitting either a Free Application for Federal Student Aid (FAFSA) or an On-Line application. The FAFSA is the federal application for federal student aid programs. Students who are not eligible for federal grant aid can use the On-Line application.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is generally considered valid and is accurately and reliably reported, but it does use an estimate of the number of TOPS applicants in calculating the ratio that is considered a relatively good estimate of the size of the pool of applicants for a TOPS award.
- 6. Data Source, Collection and Reporting:** The source of data is the agency's database that contains student records populated with information primarily drawn from the federal processor for FAFSA application or On-Line application data, ACT and/or SAT for ACT scores, and the Louisiana Department of Education's Student Transcript System for graduation, grade and course completion data. It is examined on a weekly basis and reported semi-annually for the state fiscal year.
- 7. Calculation Methodology:** The indicator is calculated using a standard calculation of dividing the Number of applicants whose eligibility was determined by September 1st (LaPAS PI Code 20380) by Number of (high school) graduates who applied for TOPS (LaPAS PI Code 20379).
- 8. Scope:** The indicator is a simple calculation using the method described above.
- 9. Caveats:** The caveats for LaPAS PI Code 20380 and LaPAS PI Code 20379 are applicable for this indicator.
- 10. Responsible Person:** Contact Susan Bohall, Initial Eligibility Section Supervisor, Scholarship and Grant Division, Phone: 225-922-1149, FAX: 225-925-4969, Email: sbohall@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.1

Indicator Name: Number of Louisiana High School Graduates

Indicator LaPAS PI Code: 20994

- 1. Type and Level:** Input/General Performance Indicator
- 2. Rationale:** The number of Louisiana high school students shows the size of the pool from which TOPS eligible students are drawn. The information is needed to project future program costs and show the relationship between graduates and TOPS eligibles.
- 3. Use:** The indicator is used to provide high school graduation trend data to decision makers in order to project program costs in the future. It is used for performance-based budgeting purposes.
- 4. Clarity:** The Louisiana Department of Education (LDE), in conjunction with the Office of Student Financial Assistance (OSFA) and the Board of Regents (BOR), created the Student Transcript System (STS) that enables the school districts, along with charter schools, laboratory schools and nonpublic schools, to transmit student transcript data used for determining TOPS eligibility. Transcripts are submitted directly to LDE for retrieval by LOSFA. Transcript data is also extracted by the BOR and is available for colleges/universities to use in admissions decisions.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is generally considered valid, but its accuracy is dependent on the timeliness and quality of the data being entered by the individual schools or school systems.
- 6. Data Source, Collection and Reporting:** The source of data for this indicator is the Louisiana Department of Education's Student Transcript System (STS). It is examined on an as needed basis and reported semi-annually for the state fiscal year.
- 7. Calculation Methodology:** The number of graduates by school that is entered by the individual schools or school districts in the STS System is summed to calculate this indicator.
- 8. Scope:** The data is aggregated for a statewide figure and the data can be disaggregated by parish, school district, and school.
- 9. Caveats:** The indicator only includes high school graduates from approved Louisiana public and private high schools. It does not include home study students and students who graduate from out of state schools.
- 10. Responsible Person:** Contact Richard Omdal, Policy/Planning Officer, Policy Section, Phone: 225-922-1043, FAX: 225-922-1429, Email: romdal@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.1

Indicator Name: Percentage of graduates eligible for TOPS

Indicator LaPAS PI Code: 20995

- 1. Type and Level:** Outcome/General Performance Indicator
- 2. Rationale:** The percentage of graduates eligible for a TOPS award provides information that can be used in subsequent years to project the number of new students entering the TOPS pipeline. The information is needed to project future program costs and show the relationship between graduates and TOPS eligibles.
- 3. Use:** The indicator is used to provide trend data to decision makers in order to project program costs in the future. It is used for performance-based budgeting purposes.
- 4. Clarity:** The indicator clearly states what is being measured.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is generally considered valid, but its accuracy is dependent on the timeliness and quality of the data being entered by the individual schools or school systems concerning the number of graduates.
- 6. Data Source, Collection and Reporting:** The source of data for this indicator is the Louisiana Department of Education's Student Transcript System (STS) for graduate data and the agency's database for TOPS eligibles. It is examined on an as needed basis and reported semi-annually for the state fiscal year.
- 7. Calculation Methodology:** This indicator uses a standard calculation by dividing the number of students determined eligible for a TOPS award by the Number of Louisiana High School Graduates (LaPAS PI Code 20994) from the prior academic year (high school).
- 8. Scope:** The data is aggregated for a statewide figure and the data can be disaggregated by parish, school district, and school.
- 9. Caveats:** The indicator only includes high school graduates from approved Louisiana public and private high schools. It does not include home study students and students who graduate from out of state schools.
- 10. Responsible Person:** Contact Richard Omdal, Policy/Planning Officer, Policy Section, Phone: 225-922-1043, FAX: 225-922-1429, Email: romdal@osfa.la.gov.

OFFICE OF STUDENT FINANCIAL ASSISTANCE

Strategic Plan 2008-2013

PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.1

Indicator Name: Percentage of graduates receiving TOPS awards

Indicator LaPAS PI Code: 20996

- 1. Type and Level:** Outcome/General Performance Indicator
- 2. Rationale:** This indicator basically shows the usage rate of the TOPS award it is needed for planning and program cost projection purposes. It basically shows the success of the program in convincing Louisiana graduates to continue their education in Louisiana and attend in-state schools.
- 3. Use:** The indicator is used to provide trend data to decision makers in order to project program costs in the future. It is used for performance-based budgeting purposes.
- 4. Clarity:** The indicator shows the percentage of all students determined eligible for a TOPS award that actually received a TOPS payment. The percentage is not based on total high school graduates, but on the subset of those that were actually eligible for an award.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid, and it is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data for this indicator is the agency's database for TOPS eligibles and TOPS payments. It is examined on an as needed basis and reported semi-annually for the state fiscal year.
- 7. Calculation Methodology:** This indicator uses a standard calculation by dividing the number of students receiving a TOPS payment by the number of students determined eligible for a TOPS award.
- 8. Scope:** The data is aggregated for a statewide figure and the data can be disaggregated by parish, school district, and school.
- 9. Caveats:** The indicator includes all TOPS eligible students, even home study students and students who graduate from out of state schools.
- 10. Responsible Person:** Contact Richard Omdal, Policy/Planning Officer, Policy Section, Phone: 225-922-1043, FAX: 225-922-1429, Email: romdal@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.1

Indicator Name: Average Amount Awarded: Opportunity

Indicator LaPAS PI Code: 11440

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The TOPS award pays a set tuition amount based on school attended and an annual stipend of \$400 for a Performance Award and \$800 for an Honors award. The tuition portion of the payment varies widely from institution to institution. This indicator provides a simple statewide average for cost estimation purposes for the TOPS Opportunity Award.
- 3. Use:** The indicator is used for program cost projections and fiscal impact assessments. It is used for performance-based budgeting purposes.
- 4. Clarity:** The Taylor Opportunity Program for Students (TOPS) is a state funded merit based scholarship program that provides tuition and, if eligible, stipend payments to eligible postsecondary students attending Louisiana public colleges and universities and eligible Louisiana private schools that are members of the Louisiana Association of Independent Colleges and Universities (LAICU).
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid, and it is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The data source for this indicator is the agency's database of payments to colleges and universities for TOPS awards. The data is grouped by academic year and includes all payments for that academic year regardless of the fiscal year in which the payment was actually billed and paid. It is examined on a weekly basis and reported semi-annually for the academic year that corresponds to a state fiscal year.
- 7. Calculation Methodology:** The indicator uses a standard calculation that sums all payments at the Opportunity Award level and divides that number by the sum of the number of students receiving TOPS payments at the same award level.
- 8. Scope:** The indicator is a simple average of the amount awarded statewide for the TOPS Opportunity Award.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Richard Omdal, Policy/Planning Officer, Policy Section, Phone: 225-922-1043, FAX: 225-922-1429, Email: romdal@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.1

Indicator Name: Average Amount Awarded: Performance

Indicator LaPAS PI Code: 11441

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The TOPS award pays a set tuition amount based on school attended and an annual stipend of \$400 for a Performance Award and \$800 for an Honors award. The tuition portion of the payment varies widely from institution to institution. This indicator provides a simple statewide average for cost estimation purposes for the TOPS Performance Award.
- 3. Use:** The indicator is used for program cost projections and fiscal impact assessments. It is used for performance-based budgeting purposes.
- 4. Clarity:** The Taylor Opportunity Program for Students (TOPS) is a state funded merit based scholarship program that provides tuition and, if eligible, stipend payments to eligible postsecondary students attending Louisiana public colleges and universities and eligible Louisiana private schools that are members of the Louisiana Association of Independent Colleges and Universities (LAICU).
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid, and it is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The data source for this indicator is the agency's database of payments to colleges and universities for TOPS awards. The data is grouped by academic year and includes all payments for that academic year regardless of the fiscal year in which the payment was actually billed and paid. It is examined on a weekly basis and reported semi-annually for the academic year that corresponds to a state fiscal year.
- 7. Calculation Methodology:** The indicator uses a standard calculation that sums all payments at the Performance Award level and divides that number by the sum of the number of students receiving TOPS payments at the same award level.
- 8. Scope:** The indicator is a simple average of the amount awarded statewide for the TOPS Performance Award.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Richard Omdal, Policy/Planning Officer, Policy Section, Phone: 225-922-1043, FAX: 225-922-1429, Email: romdal@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.1

Indicator Name: Average Amount Awarded: Honors

Indicator LaPAS PI Code: 11449

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The TOPS award pays a set tuition amount based on school attended and an annual stipend of \$400 for a Performance Award and \$800 for an Honors award. The tuition portion of the payment varies widely from institution to institution. This indicator provides a simple statewide average for cost estimation purposes for the TOPS Honors Award.
- 3. Use:** The indicator is used for program cost projections and fiscal impact assessments. It is used for performance-based budgeting purposes.
- 4. Clarity:** The Taylor Opportunity Program for Students (TOPS) is a state funded merit based scholarship program that provides tuition and, if eligible, stipend payments to eligible postsecondary students attending Louisiana public colleges and universities and eligible Louisiana private schools that are members of the Louisiana Association of Independent Colleges and Universities (LAICU).
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid, and it is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The data source for this indicator is the agency's database of payments to colleges and universities for TOPS awards. The data is grouped by academic year and includes all payments for that academic year regardless of the fiscal year in which the payment was actually billed and paid. It is examined on a weekly basis and reported semi-annually for the academic year that corresponds to a state fiscal year.
- 7. Calculation Methodology:** The indicator uses a standard calculation that sums all payments at the Honors Award level and divides that number by the sum of the number of students receiving TOPS payments at the same award level.
- 8. Scope:** The indicator is a simple average of the amount awarded statewide for the TOPS Honors Award.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Richard Omdal, Policy/Planning Officer, Policy Section, Phone: 225-922-1043, FAX: 225-922-1429, Email: romdal@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.1

Indicator Name: Average Amount Awarded: Teachers

Indicator LaPAS PI Code: 11450

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The TOPS Teacher program is a loan forgiveness program that is no longer being funded. It is being monitored for students who are still fulfilling their teaching obligation or who are in the process of repaying their loan.
- 3. Use:** The indicator was used for program cost projections and fiscal impact assessments. It is used for performance-based budgeting purposes.
- 4. Clarity:** The Taylor Opportunity Program for Students (TOPS) – Teachers was a loan forgiveness program that provided up to \$4,000 per year in funding (\$6,000 per year for students seeking a mathematics or chemistry degree) for students intending to teach as a classroom teacher in Louisiana after graduation. For every year of teaching completed, the program forgives one year's worth of payment plus any interest incurred.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid, and it is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The data source for this indicator is the agency's records and documentation. It is examined on an as needed basis and reported semi-annually for the academic year that corresponds to a state fiscal year.
- 7. Calculation Methodology:** The indicator uses a standard calculation that sums all payments for the TOPS Teacher Award and divides that number by the sum of the number of students receiving payments for the TOPS Teacher Award.
- 8. Scope:** The indicator is a simple average of the amount awarded statewide for the TOPS Teacher Award.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Richard Omdal, Policy/Planning Officer, Policy Section, Phone: 225-922-1043, FAX: 225-922-1429, Email: romdal@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.1

Indicator Name: Average Amount Awarded: TOPS-Tech

Indicator LaPAS PI Code: 11451

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The TOPS award pays a set tuition amount based on school attended and also an annual stipend of \$400 for a Performance Award and \$800 for an Honors award. The tuition portion of the payment varies widely from institution to institution. This indicator provides a simple statewide average for cost estimation purposes for the TOPS-Tech Award.
- 3. Use:** The indicator is used for program cost projections and fiscal impact assessments. It is used for performance-based budgeting purposes.
- 4. Clarity:** The Taylor Opportunity Program for Students (TOPS) is a state funded merit based scholarship program that provides tuition and, if eligible, stipend payments to eligible postsecondary students attending Louisiana public colleges and universities and eligible Louisiana private schools that are members of the Louisiana Association of Independent Colleges and Universities (LAICU).
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid, and it is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The data source for this indicator is the agency's database of payments to colleges and universities for TOPS awards. The data is grouped by academic year and includes all payments for that academic year regardless of the fiscal year in which the payment was actually billed and paid. It is examined on a weekly basis and reported semi-annually for the academic year that corresponds to a state fiscal year.
- 7. Calculation Methodology:** The indicator uses a standard calculation that sums all payments at the Technical Award level and divides that number by the sum of the number of students receiving TOPS payments at the same award level.
- 8. Scope:** The indicator is a simple average of the amount awarded statewide for the TOPS-Tech Award.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Richard Omdal, Policy/Planning Officer, Policy Section, Phone: 225-922-1043, FAX: 225-922-1429, Email: romdal@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.1

Indicator Name: Average Amount Awarded: National Guard Book Fee

Indicator LaPAS PI Code: 11445

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The TOPS National Guard Book Fee Award pays up to \$300 a year to eligible students. This indicator reports the \$300 fee for cost estimation purposes.
- 3. Use:** The indicator is used for program cost projections and fiscal impact assessments. It is used for performance-based budgeting purposes.
- 4. Clarity:** Students who are active members of the Louisiana National Guard and who are eligible for the National Guard Tuition Waiver and a TOPS Award receive the TOPS National Guard Book Fee Award in lieu of the full TOPS Award plus their stipend if eligible for the TOPS Performance or Honors Award. The Taylor Opportunity Program for Students (TOPS) is a state funded merit based scholarship program that provides tuition and, if eligible, stipend payments to eligible postsecondary students attending Louisiana public colleges and universities and eligible Louisiana private schools that are members of the Louisiana Association of Independent Colleges and Universities (LAICU).
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid, and it is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The data source for this indicator is the agency's database of payments to colleges and universities for TOPS awards. The data is grouped by academic year and includes all payments for that academic year regardless of the fiscal year in which the payment was actually billed and paid. It is examined on a weekly basis and reported semi-annually for the academic year that corresponds to a state fiscal year.
- 7. Calculation Methodology:** The indicator simply reports the current National Guard Book Fee payment level.
- 8. Scope:** The indicator simply reports the current National Guard Book Fee payment level.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Richard Omdal, Policy/Planning Officer, Policy Section, Phone: 225-922-1043, FAX: 225-922-1429, Email: romdal@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.1

Indicator Name: Retention Rate of TOPS award for second year: Opportunity

Indicator LaPAS PI Code: 11446

- 1. Type and Level:** Input and Outcome/General Performance Indicator
- 2. Rationale:** For planning and cost estimation purposes, the agency developed an approximation method to provide an estimate of the retention rates for each TOPS award level for the second and subsequent years. This estimate of continuing awards combined with an estimate of new awards allows the agency to project the number of students who will receive TOPS awards by award level for future years. The retention rate for the first to second year is reported since this is the period with the lowest retention rate due to the difficulty of transition from high school to college academic levels experienced by most students.
- 3. Use:** The indicator is used for program cost projections and fiscal impact assessments. It is used for performance-based budgeting purposes.
- 4. Clarity:** The Taylor Opportunity Program for Students (TOPS) is a state funded merit based scholarship program. Students must enroll full time each semester, maintain continuous enrollment and earn 24 hours each academic year to continue receiving their TOPS Awards for subsequent years. They must also have at least the required minimum cumulative grade point average (GPA) or their TOPS Award will be suspended until they achieve the required standard if they do so within the time required.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered relatively valid, and it is accurately and reliably reported. However, since students can raise their cumulative GPA to the minimum standard and have their award suspension lifted and can receive an exception to the requirements for initial enrollment, full time each semester, maintain continuous enrollment and earn 24 hours each academic year and have their TOPS Award restored, this rate can change over time after the indicator is reported.
- 6. Data Source, Collection and Reporting:** The data source for this indicator is the agency's TOPS database. It is examined on an as needed basis and reported semi-annually for the state fiscal year.
- 7. Calculation Methodology:** The indicator calculates a retention rate by using an approximation process that looks at the payment status of students in a particular graduation cohort during the first academic year after high school graduation compared to the payment status for the same cohort in the following academic year.
- 8. Scope:** The data is aggregated by high school graduation year.
- 9. Caveats:** This retention rate is an approximation of the retention rate for each TOPS award level and it is intended for cost estimating purposes only. It reflects a snapshot in time and does not accurately report the student's retention in college.
- 10. Responsible Person:** Contact Richard Omdal, Policy/Planning Officer, Policy Section, Phone: 225-922-1043, FAX: 225-922-1429, Email: romdal@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.1

Indicator Name: Retention Rate of TOPS award for second year: Performance

Indicator LaPAS PI Code: 11448

- 1. Type and Level:** Input and Outcome/General Performance Indicator
- 2. Rationale:** For planning and cost estimation purposes, the agency developed an approximation method to provide an estimate of the retention rates for each TOPS award level for the second and subsequent years. This estimate of continuing awards combined with an estimate of new awards allows the agency to project the number of students who will receive TOPS awards by award level for future years. The retention rate for the first to second year is reported since this is the period with the lowest retention rate due to the difficulty of transition from high school to college academic levels experienced by most students.
- 3. Use:** The indicator is used for program cost projections and fiscal impact assessments. It is used for performance-based budgeting purposes.
- 4. Clarity:** The Taylor Opportunity Program for Students (TOPS) is a state funded merit based scholarship program. Students must enroll full time each semester, maintain continuous enrollment and earn 24 hours each academic year to continue receiving their TOPS Awards for subsequent years. They must also have at least the required minimum cumulative grade point average (GPA) or their TOPS Award will be suspended until they achieve the required standard if they do so within the time required.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered relatively valid, and it is accurately and reliably reported. However, since students can raise their cumulative GPA to the minimum standard and have their award suspension lifted and can receive an exception to the requirements for initial enrollment, full time each semester, maintain continuous enrollment and earn 24 hours each academic year and have their TOPS Award restored, this rate can change over time after the indicator is reported.
- 6. Data Source, Collection and Reporting:** The data source for this indicator is the agency's TOPS database. It is examined on an as needed basis and reported semi-annually for the state fiscal year.
- 7. Calculation Methodology:** The indicator calculates a retention rate by using an approximation process that looks at the payment status of students in a particular graduation cohort during the first academic year after high school graduation compared to the payment status for the same cohort in the following academic year.
- 8. Scope:** The data is aggregated by high school graduation year.
- 9. Caveats:** This retention rate is an approximation of the retention rate for each TOPS award level and it is intended for cost estimating purposes only. It reflects a snapshot in time and does not accurately report the student's retention in college.
- 10. Responsible Person:** Contact Richard Omdal, Policy/Planning Officer, Policy Section, Phone: 225-922-1043, FAX: 225-922-1429, Email: romdal@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.1

Indicator Name: Retention Rate of TOPS award for second year: Honors

Indicator LaPAS PI Code: 11449

1. **Type and Level:** Input and Outcome/General Performance Indicator
2. **Rationale:** For planning and cost estimation purposes, the agency developed an approximation method to provide an estimate of the retention rates for each TOPS award level for the second and subsequent years. This estimate of continuing awards combined with an estimate of new awards allows the agency to project the number of students who will receive TOPS awards by award level for future years. The retention rate for the first to second year is reported since this is the period with the lowest retention rate due to the difficulty of transition from high school to college academic levels experienced by most students.
3. **Use:** The indicator is used for program cost projections and fiscal impact assessments. It is used for performance-based budgeting purposes.
4. **Clarity:** The Taylor Opportunity Program for Students (TOPS) is a state funded merit based scholarship program. Students must enroll full time each semester, maintain continuous enrollment and earn 24 hours each academic year to continue receiving their TOPS Awards for subsequent years. They must also have at least the required minimum cumulative grade point average (GPA) or their TOPS Award will be suspended until they achieve the required standard if they do so within the time required.
5. **Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered relatively valid, and it is accurately and reliably reported. However, since students can raise their cumulative GPA to the minimum standard and have their award suspension lifted and can receive an exception to the requirements for initial enrollment, full time each semester, maintain continuous enrollment and earn 24 hours each academic year and have their TOPS Award restored, this rate can change over time after the indicator is reported.
6. **Data Source, Collection and Reporting:** The data source for this indicator is the agency's TOPS database. It is examined on an as needed basis and reported semi-annually for the state fiscal year.
7. **Calculation Methodology:** The indicator calculates a retention rate by using an approximation process that looks at the payment status of students in a particular graduation cohort during the first academic year after high school graduation compared to the payment status for the same cohort in the following academic year.
8. **Scope:** The data is aggregated by high school graduation year.
9. **Caveats:** This retention rate is an approximation of the retention rate for each TOPS award level and it is intended for cost estimating purposes only. It reflects a snapshot in time and does not accurately report the student's retention in college.
10. **Responsible Person:** Contact Richard Omdal, Policy/Planning Officer, Policy Section, Phone: 225-922-1043, FAX: 225-922-1429, Email: romdal@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.1

Indicator Name: Retention Rate of TOPS award for second year: Teacher

Indicator LaPAS PI Code: 11450

- 1. Type and Level:** Input and Outcome/General Performance Indicator
- 2. Rationale:** For planning and cost estimation purposes, the agency developed an approximation method to provide an estimate of the retention rates for the second and subsequent years. This estimate of continuing awards combined with an estimate of new awards allowed the agency to project the number of students who will receive an award for future years. The retention rate for the first to second year is reported since this is generally the period with the lowest retention rate.
- 3. Use:** The indicator is used for program cost projections and fiscal impact assessments, but this program has not been funded in recent years. It is used for performance-based budgeting purposes.
- 4. Clarity:** The Taylor Opportunity Program for Students (TOPS) – Teacher is a loan forgiveness program. This program is no longer funded. Students were required to meet certain requirements to continue receiving funding for subsequent years.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered relatively valid, and it is accurately and reliably reported. This program is no longer funded and there are no program students in college.
- 6. Data Source, Collection and Reporting:** The data source for this indicator is the agency's records and documentation. It is examined on an as needed basis and reported semi-annually for the state fiscal year.
- 7. Calculation Methodology:** The indicator calculates a retention rate by looking at the number of students who received payments for the first time in the prior academic year compared to those that continued to receive payments in the current academic year.
- 8. Scope:** The data is aggregated by academic year.
- 9. Caveats:** This retention rate is an approximation of the retention rate for the TOPS Teacher program and it is intended for cost estimating purposes only. It reflects a snapshot in time and does not accurately report the student's retention in college.
- 10. Responsible Person:** Contact Richard Omdal, Policy/Planning Officer, Policy Section, Phone: 225-922-1043, FAX: 225-922-1429, Email: romdal@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.1

Indicator Name: Retention Rate of TOPS award for second year: TOPS-Tech

Indicator LaPAS PI Code: 11451

- 1. Type and Level:** Input and Outcome/General Performance Indicator
- 2. Rationale:** For planning and cost estimation purposes, the agency developed an approximation method to provide an estimate of the retention rates for each TOPS award level for the second and subsequent years. This estimate of continuing awards combined with an estimate of new awards allows the agency to project the number of students who will receive TOPS awards by award level for future years. The retention rate for the first to second year is reported since this is the period with the lowest retention rate due to the difficulty of transition from high school to college academic levels experienced by most students.
- 3. Use:** The indicator is used for program cost projections and fiscal impact assessments. It is used for performance-based budgeting purposes.
- 4. Clarity:** The Taylor Opportunity Program for Students (TOPS) is a state funded merit based scholarship program. Students must enroll full time each semester, maintain continuous enrollment and earn 24 hours each academic year to continue receiving their TOPS Awards for subsequent years. They must also have at least the required minimum cumulative grade point average (GPA) or their TOPS Award will be suspended until they achieve the required standard if they do so within the time required.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered relatively valid, and it is accurately and reliably reported. However, since students can receive an exception to the requirements and have their TOPS Award restored, raise their cumulative GPA to the minimum standard and have their award suspension lifted, or delay entry into college, this rate can change over time after the indicator is reported.
- 6. Data Source, Collection and Reporting:** The data source for this indicator is the agency's TOPS database. It is examined on an as needed basis and reported semi-annually for the state fiscal year.
- 7. Calculation Methodology:** The indicator calculates a retention rate by using an approximation process that looks at the payment status of students in a particular graduation cohort during the first academic year after high school graduation compared to the payment status for the same cohort in the following academic year.
- 8. Scope:** The data is aggregated by high school graduation year.
- 9. Caveats:** This retention rate is an approximation of the retention rate for each TOPS award level and it is intended for cost estimating purposes only. It reflects a snapshot in time and does not accurately report the student's retention in college.
- 10. Responsible Person:** Contact Richard Omdal, Policy/Planning Officer, Policy Section, Phone: 225-922-1043, FAX: 225-922-1429, Email: romdal@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.1

Indicator Name: Teacher Prep Loan Fund: Total number of recipients

Indicator LaPAS PI Code: 11454

- 1. Type and Level:** Input/General Performance Indicator
- 2. Rationale:** The TOPS Teacher program is a loan forgiveness program that is no longer being funded. It is being monitored for students who are still fulfilling their teaching obligation or who are in the process of repaying their loan. The agency provides general data for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the TOPS – Teacher program and track its usage and the expenditure of appropriated funds to support the program. This indicator specifically tracks the total number of program participants. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Teacher Prep Loan Fund was the funding source for the Taylor Opportunity Program for Students (TOPS) – Teachers. This program was a loan forgiveness program that provided up to \$4,000 per year in funding (\$6,000 per year for students seeking a mathematics or chemistry degree) for students intending to teach as a classroom teacher in Louisiana after graduation. For every year of teaching completed, the program forgave one year's worth of payment plus any interest incurred.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid, and it is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The data source for this indicator is the agency's records and documentation. It is examined on an as needed basis and reported semi-annually for the state fiscal year.
- 7. Calculation Methodology:** The indicator sums the total number of students that ever received payments under the TOPS-Teacher program, regardless of fiscal year that the payment was made or program requirements completed.
- 8. Scope:** The data is aggregated for the entire program.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-922-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.1

Indicator Name: Teacher Prep Loan Fund: Total amount awarded

Indicator LaPAS PI Code: 11452

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The TOPS Teacher program is a loan forgiveness program that is no longer being funded. It is being monitored for students who are still fulfilling their teaching obligation or who are in the process of repaying their loan. The agency provides general data for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the TOPS – Teacher program and track its usage and the expenditure of appropriated funds to support the program. This indicator specifically tracks the total amount of funding issued to students as loans. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Teacher Prep Loan Fund was the funding source for the Taylor Opportunity Program for Students (TOPS) – Teachers. This program was a loan forgiveness program that provided up to \$4,000 per year in funding (\$6,000 per year for students seeking a mathematics or chemistry degree) for students intending to teach as a classroom teacher in Louisiana after graduation. For every year of teaching completed, the program forgave one year's worth of payment plus any interest incurred.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid, and it is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The data source for this indicator is the agency's records and documentation. It is examined on an as needed basis and reported semi-annually for the state fiscal year.
- 7. Calculation Methodology:** The indicator sums the total number of dollars given to students as loans for the life of the program, regardless of fiscal year that the payment was made or program requirements completed.
- 8. Scope:** The data is aggregated for the entire program.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-922-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.1

Indicator Name: Teacher Prep Loan Fund: Number of renewal awards

Indicator LaPAS PI Code: 11459

- 1. Type and Level:** Input/General Performance Indicator
- 2. Rationale:** The TOPS Teacher program is a loan forgiveness program that is no longer being funded. It is being monitored for students who are still fulfilling their teaching obligation or who are in the process of repaying their loan. The agency provides general data for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the TOPS – Teacher program and track its usage and the expenditure of appropriated funds to support the program. This indicator specifically reports the number of renewal awards during the state fiscal year. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Teacher Prep Loan Fund was the funding source for the Taylor Opportunity Program for Students (TOPS) – Teachers. This program was a loan forgiveness program that provided up to \$4,000 per year in funding (\$6,000 per year for students seeking a mathematics or chemistry degree) for students intending to teach as a classroom teacher in Louisiana after graduation. For every year of teaching completed, the program forgave one year's worth of payment plus any interest incurred.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid, and it is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The data source for this indicator is the agency's records and documentation. It is examined on an as needed basis and reported semi-annually for the state fiscal year.
- 7. Calculation Methodology:** The indicator sums the total number of students who received an award during the state fiscal year for a second or subsequent year.
- 8. Scope:** The data is aggregated for the entire program.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-922-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.1

Indicator Name: Teacher Prep Loan Fund: Number of new awards

Indicator LaPAS PI Code: 11458

- 1. Type and Level:** Input/General Performance Indicator
- 2. Rationale:** The TOPS Teacher program is a loan forgiveness program that is no longer being funded. It is being monitored for students who are still fulfilling their teaching obligation or who are in the process of repaying their loan. The agency provides general data for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the TOPS – Teacher program and track its usage and the expenditure of appropriated funds to support the program. This indicator specifically reports the number of new or first time awards during the state fiscal year. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Teacher Prep Loan Fund was the funding source for the Taylor Opportunity Program for Students (TOPS) – Teachers. This program was a loan forgiveness program that provided up to \$4,000 per year in funding (\$6,000 per year for students seeking a mathematics or chemistry degree) for students intending to teach as a classroom teacher in Louisiana after graduation. For every year of teaching completed, the program forgave one year's worth of payment plus any interest incurred.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid, and it is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The data source for this indicator is the agency's records and documentation. It is examined on an as needed basis and reported semi-annually for the state fiscal year.
- 7. Calculation Methodology:** The indicator sums the total number of students that received an award for the state fiscal year under the TOPS-Teacher program for the first time.
- 8. Scope:** The data is aggregated for the entire program.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-922-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.1

Indicator Name: Teacher Prep Loan Fund: Number of Graduates

Indicator LaPAS PI Code: 11460

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The TOPS Teacher program is a loan forgiveness program that is no longer being funded. It is being monitored for students who are still fulfilling their teaching obligation or who are in the process of repaying their loan. The agency provides general data for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the TOPS – Teacher program and track its usage and the expenditure of appropriated funds to support the program. This indicator reports the total number of students who have graduated under this program. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Teacher Prep Loan Fund was the funding source for the Taylor Opportunity Program for Students (TOPS) – Teachers. This program was a loan forgiveness program that provided up to \$4,000 per year in funding (\$6,000 per year for students seeking a mathematics or chemistry degree) for students intending to teach as a classroom teacher in Louisiana after graduation. For every year of teaching completed, the program forgave one year's worth of payment plus any interest incurred.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid, and it is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The data source for this indicator is the agency's records and documentation. It is examined on an as needed basis and reported semi-annually for the state fiscal year.
- 7. Calculation Methodology:** The indicator sums the total number of students that graduated from college under the TOPS-Teacher program since its inception.
- 8. Scope:** The data is aggregated for the entire program.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-922-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.1

Indicator Name: Teacher Prep Loan Fund: Number of graduates who have fulfilled their teaching requirement

Indicator LaPAS PI Code: 11461

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The TOPS Teacher program is a loan forgiveness program that is no longer being funded. It is being monitored for students who are still fulfilling their teaching obligation or who are in the process of repaying their loan. The agency provides general data for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the TOPS – Teacher program and track its usage and the expenditure of appropriated funds to support the program. This indicator specifically reports the total number of graduates that have completed the program by fulfilling their teaching obligation and had their loans forgiven. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Teacher Prep Loan Fund was the funding source for the Taylor Opportunity Program for Students (TOPS) – Teachers. This program was a loan forgiveness program that provided up to \$4,000 per year in funding (\$6,000 per year for students seeking a mathematics or chemistry degree) for students intending to teach as a classroom teacher in Louisiana after graduation. For every year of teaching completed, the program forgave one year's worth of payment plus any interest incurred.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid, and it is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The data source for this indicator is the agency's records and documentation. It is examined on an as needed basis and reported semi-annually for the state fiscal year.
- 7. Calculation Methodology:** The indicator sums the total number of students since the inception of the program that graduated under the TOPS-Teacher program and who had their loans forgiven because they completed their teaching obligation.
- 8. Scope:** The data is aggregated for the entire program.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-922-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.1

Indicator Name: Teacher Prep Loan Fund: Number of awards repaid in full

Indicator LaPAS PI Code: 18012

- 1. Type and Level:** Output/General Performance Indicator
- 2. Rationale:** The TOPS Teacher program is a loan forgiveness program that is no longer being funded. It is being monitored for students who are still fulfilling their teaching obligation or who are in the process of repaying their loan. The agency provides general data for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the TOPS – Teacher program and track its usage and the expenditure of appropriated funds to support the program. This indicator reports the total number of students who entered repayment status on their loans because they did not complete their teaching obligation and who subsequently repaid any remaining debt in full. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Teacher Prep Loan Fund was the funding source for the Taylor Opportunity Program for Students (TOPS) – Teachers. This program was a loan forgiveness program that provided up to \$4,000 per year in funding (\$6,000 per year for students seeking a mathematics or chemistry degree) for students intending to teach as a classroom teacher in Louisiana after graduation. For every year of teaching completed, the program forgave one year's worth of payment plus any interest incurred.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid, and it is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The data source for this indicator is the agency's records and documentation. It is examined on an as needed basis and reported semi-annually for the state fiscal year.
- 7. Calculation Methodology:** The indicator sums the total number of students that failed to complete their teaching obligation and who paid the remaining loan debt in full since the inception of the program.
- 8. Scope:** The data is aggregated for the entire program.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-922-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.1

Indicator Name: Teacher Prep Loan Fund: Number of loans in repayment

Indicator LaPAS PI Code: 11466

- 1. Type and Level:** Input/General Performance Indicator
- 2. Rationale:** The TOPS Teacher program is a loan forgiveness program that is no longer being funded. It is being monitored for students who are still fulfilling their teaching obligation or who are in the process of repaying their loan. The agency provides general data for scholarship and/or grant programs administered by the agency to show the usage and general status of these programs to decision makers.
- 3. Use:** The agency uses the indicator to monitor the TOPS – Teacher program and track its usage and the expenditure of appropriated funds to support the program. This indicator specifically reports the total number of students who failed to complete their teaching obligation and whose loans have been placed in a repayment status. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Teacher Prep Loan Fund was the funding source for the Taylor Opportunity Program for Students (TOPS) – Teachers. This program was a loan forgiveness program that provided up to \$4,000 per year in funding (\$6,000 per year for students seeking a mathematics or chemistry degree) for students intending to teach as a classroom teacher in Louisiana after graduation. For every year of teaching completed, the program forgave one year's worth of payment plus any interest incurred.
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid, and it is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The data source for this indicator is the agency's records and documentation. It is examined on an as needed basis and reported semi-annually for the state fiscal year.
- 7. Calculation Methodology:** The indicator sums the total number of students that failed to complete their teaching obligation and whose loans have been placed in a repayment status. Students who have repaid their loans are not included in this number.
- 8. Scope:** The data is aggregated for the entire program.
- 9. Caveats:** There are no caveats for this indicator.
- 10. Responsible Person:** Contact Bonnie Lavergne, Special Programs, Scholarship and Grant Programs, Phone: 225-922-0412, FAX: 225-922-4969, Email: blavergne@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.2

Indicator Name: Total number of accurate billing requests received

Indicator LaPAS PI Code: 11437

1. **Type and Level:** Input/Supporting
2. **Rationale:** A primary goal of the agency is to achieve and maintain the highest standards of customer service. Prompt payment of bills from colleges and universities for TOPS Awards can be measured to judge the agency's success in providing a high level of customer service. Objective I.2 provides a goal to pay 100% of all TOPS billing requests within 10 days of receiving accurate billing data.
3. **Use:** The indicator is used to monitor the workload for bill processing and evaluate the efficiency of the Scholarship and Grant Division in processing bills for payment within the ten working day timeframe. The indicator is reported for performance-based budgeting purposes.
4. **Clarity:** The Taylor Opportunity Program for Students (TOPS) is a state funded merit based scholarship program that provides tuition and, if eligible, stipend payments to eligible postsecondary students attending Louisiana public colleges and universities and eligible Louisiana private schools that are members of the Louisiana Association of Independent Colleges and Universities (LAICU).
5. **Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid, and it is accurately and reliably reported.
6. **Data Source, Collection and Reporting:** The source of data for this indicator is the agency's TOPS database that contains payment information, student eligibility status, and other data necessary to make a payment determination. It is examined on a semiannual basis and reported semi-annually for the state fiscal year.
7. **Calculation Methodology:** Schools submit bills with a list of students to the agency asking for TOPS payments for those students. The indicator sums the request from all schools by student to arrive at a total number of accurate billings. A request for a tuition payment and stipend payment for one student is treated as two billing requests.
8. **Scope:** The indicator uses aggregated data for all schools by student for a program wide total.
9. **Caveats:** Bills received from colleges and universities with errors and omissions are either corrected by the staff and processed or rejected and returned to the school to be resubmitted with accurate information. The staff works with the school to correct any discrepancies to expedite the resubmittal process. Rejected bills are not included in the total for this indicator.
10. **Responsible Person:** Contact Dr. John Bell, Renewal Section Supervisor, Scholarship and Grant Division, Phone: 225-922-1113, FAX: 225-925-4969, Email: jbelle@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.2

Indicator Name: Total number of billing requests processed within 10 days of receipt of accurate information

Indicator LaPAS PI Code: 11438

- 1. Type and Level:** Output/Supporting
- 2. Rationale:** A primary goal of the agency is to achieve and maintain the highest standards of customer service. Prompt payment of bills from colleges and universities for TOPS Awards can be measured to judge the agency's success in providing a high level of customer service. Objective I.2 provides a goal to pay 100% of all TOPS billing requests within 10 days of receiving accurate billing data.
- 3. Use:** The indicator is used to monitor the efficiency of the Scholarship and Grant Division in processing bills for payment within the ten working day timeframe. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Taylor Opportunity Program for Students (TOPS) is a state funded merit based scholarship program that provides tuition and, if eligible, stipend payments to eligible postsecondary students attending Louisiana public colleges and universities and eligible Louisiana private schools that are members of the Louisiana Association of Independent Colleges and Universities (LAICU).
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid, and it is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data for this indicator is the agency's TOPS database that contains payment information, student eligibility status, and other data necessary to make a payment determination. It is examined on a semiannual basis and reported semi-annually for the state fiscal year.
- 7. Calculation Methodology:** Schools submit bills to the agency asking for TOPS payments for listed students. If the bill is accurate, it is processed and a payment request is generated to forward TOPS funding to that school. The indicator sums all billing requests for which a payment request has been generated by the Scholarship and Grant Division staff within the ten working day timeframe. A request for a tuition payment and stipend payment for one student is treated as two billing requests.
- 8. Scope:** The indicator uses aggregated data for all schools by student for a program total.
- 9. Caveats:** 1) Bills received from colleges and universities with errors and omissions are either corrected by the staff and processed or rejected and returned to the school to be resubmitted with accurate information. The staff works with the school to correct any discrepancies to expedite the resubmittal process. Rejected bills are not included in the total for this indicator. 2) Although the ten day timeframe measurement does not include the time that the Fiscal Division takes to generate a payment request to the State Treasury, the time State Treasury takes to cut a check or effect an electronic funds transfer, or the time the agency takes to mail checks received from State Treasury to the schools, the process from bill receipt to transfer of funds or mailing of check to the school is generally completed within the ten working day timeframe. 3) Although payments may be held by the agency until additional funding is received from the state, the bill is still processed and, if processed within the 10 working day timeline, included in this indicator.
- 10. Responsible Person:** Contact Dr. John Bell, Renewal Section Supervisor, Scholarship and Grant Division, Phone: 225-922-1113, FAX: 225-925-4969, Email: jbelle@osfa.la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Objective: I.2

Indicator Name: Percent billing requests processed within 10 days of receipt of accurate information

Indicator LaPAS PI Code: 13865

- 1. Type and Level:** Efficiency/Supporting
- 2. Rationale:** A primary goal of the agency is to achieve and maintain the highest standards of customer service. Prompt payment of bills from colleges and universities for TOPS Awards can be measured to judge the agency's success in providing a high level of customer service. Objective I.2 provides a goal to pay 100% of all TOPS billing requests within 10 days of receiving accurate billing data.
- 3. Use:** The indicator is used to monitor the efficiency of the Scholarship and Grant Division in processing bills for payment within the ten working day timeframe. The indicator is reported for performance-based budgeting purposes.
- 4. Clarity:** The Taylor Opportunity Program for Students (TOPS) is a state funded merit based scholarship program that provides tuition and, if eligible, stipend payments to eligible postsecondary students attending Louisiana public colleges and universities and eligible Louisiana private schools that are members of the Louisiana Association of Independent Colleges and Universities (LAICU).
- 5. Validity, Reliability and Accuracy:** This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid, and it is accurately and reliably reported.
- 6. Data Source, Collection and Reporting:** The source of data for this indicator is the agency's TOPS database that contains payment information, student eligibility status, and other data necessary to make a payment determination. It is examined on a semiannual basis and reported semi-annually for the state fiscal year.
- 7. Calculation Methodology:** The indicator is calculated using a standard calculation of dividing Total number of billing requests processed within 10 days of receipt (LaPAS PI Code 11438) by Total number of accurate billing requests received (LaPAS PI Code 11437).
- 8. Scope:** The indicator is a simple calculation using two other defined agency indicators.
- 9. Caveats:** The caveats for Total number of billing requests processed within 10 days of receipt (LaPAS PI Code 11438) and Total number of accurate billing requests received (LaPAS PI Code 11437) apply for this indicator.
- 10. Responsible Person:** Contact Dr. John Bell, Renewal Section Supervisor, Scholarship and Grant Division, Phone: 225-922-1113, FAX: 225-925-4969, Email: jbelle@osfa.la.gov.

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APPENDIX G

MANAGEMENT DECISION MAKING

INDICATOR AND USAGE BY MANAGEMENT

ADMINISTRATION AND SUPPORT SERVICES

OBJECTIVE I.1

Administrative Costs are the overhead expenses required to support the agency's two primary operational programs, Loan Operations and Scholarship, Grants and START Saving Program. This indicator assists management in maintaining an appropriate cost/benefit ratio and in maximizing efficiency.

OBJECTIVE II.1

The Customer Service Inquiry Answering Rate is an indication of the Agency's responsiveness to the general public. The indicator is used to gauge the interests of the general public in the Agency's services and to plan for additional service or support for existing programs.

OBJECTIVE II.2

Monitoring Loan and Scholarship and Grant Public Education Activities assists management in gauging the interests of the public in services provided by the Agency and the effectiveness of the Agency in educating the public concerning those services.

OBJECTIVE II.3

Using technology to increase efficiency of program operations and service delivery assists management in achieving the optimum cost/benefit ratio. Increasing customer access assists management in gauging the interests of the public in services provided by the Agency and the effectiveness of the Agency in educating the public concerning those services.

OBJECTIVE II.4

To assure that student aid policy supports the broader objectives of higher education, the function of developing student aid programs as support components to the state student aid plan will involve input from the Student Financial Assistance Commission and the financial aid community to the Board of Regents.

OBJECTIVE II.5

Monitoring Student Tuition Assistance and Revenue Trust (START) Saving Program Public Education Activities assists management in gauging the interests of the public in services provided by the Agency and the effectiveness of the Agency in educating the public concerning this service.

OBJECTIVE III.1

The receipt of state funding to implement federal aid programs requiring a state match and state financial aid programs that have been legislatively approved will broaden the scope of financial aid available to students in Louisiana.

OBJECTIVE IV.1

The Audit and Review indicator is the primary tool used by management to ensure internal and external regulatory compliance with program rules and regulations.

OBJECTIVE V.I

The Human Resources indicators ensure compliance with state and federal employment laws while maintaining a qualified, well-trained workforce.

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OBJECTIVE VI.1

Maximization of agency Operating Funds affords management the capacity to support increased financial assistance to underserved populations.

OBJECTIVE VII.1

Implementation and maintenance of strong controls ensures agency compliance with applicable statutes, rules, guidance, directives, industry standards and ethical standards and prevents loss and improper use of federal, state and personal funds entrusted to the agency.

LOAN OPERATIONS DIVISION

OBJECTIVE I.1

The Minimum Reserve Ratio measures compliance with federal regulation and provides a performance indicator for management.

OBJECTIVE II.1

The Agency's share of the state's guaranteed student loan market is an indicator of customer acceptance of the Agency's product and is used by management to assess performance levels, process efficiency and marketing of services and is a primary factor contributing to the financial stability of the federal loan guarantee program. Agency total loan volume is a key indicator in budgetary planning. It also demonstrates the growth of the Agency and is used to evaluate personnel, equipment and facilities support issues.

OBJECTIVE II.2

As a guarantee agency under the Federal Family Education Loan Program, the Agency has certain due diligence obligations related to the pursuit of defaulted borrowers and the Cumulative Recovery Rate indicator assists in monitoring those obligations. The rate of recovery on defaulted loans is a measure of success of the Agency's collection efforts. It is also a source of revenue for the Agency and affects budget decisions.

SCHOLARSHIP, GRANT AND SAVING PROGRAM DIVISION

OBJECTIVE I.1

Program costs for the Scholarship and Grant Programs, and START Saving Program are used to monitor costs in relation to the size of the individual programs (funding and number of recipients) offered by the Division and to ensure an appropriate cost/benefit ratio is maintained. Management uses this analysis for budgetary purposes and to maximize efficiency.

OBJECTIVE I.2

The START Performance indicator allows management to assess the effectiveness of the agency's marketing plan and the public's interest in the program.

TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

OBJECTIVE I.1

The TOPS Eligibility Award Processing indicator assists management in monitoring the effectiveness of the automated systems and in the identification of processes that may need to change in order to provide timely award services to students. This indicator also provides information regarding the degree of utilization of the program by Louisiana high school graduates.

OBJECTIVE I.2

The Billing Request Process Efficiency indicator assists management in monitoring the effectiveness of the automated systems and in identification of processes that may need to change in order to provide timely fee payment services to schools and students.

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APPENDIX H

DUPLICATION OF EFFORT

The Agency avoids duplication of effort through its organizational structure. All personnel and assets that would have a commonality in each division are found in the Administrative and Support Services Program. The Administrative and Support Services Program provides assistance to the operational divisions, which are: Loan Operations, Scholarship and Grants, and the Taylor Opportunity Program for Students (TOPS), thereby avoiding duplication of personnel and assets across divisions.

The Administrative Support Services Program consists of the following divisions: Public Information and Communications, Information Technology, Audit, Finance and Administrative Services, Human Resources, Research/Planning and Legal. The Legal Division provides legal support for the operations and administrative divisions. This division also reports directly to the Executive Director and provides legal counsel for the Student Financial Assistance Commission, the Tuition Trust Authority and the Agency.

The operational programs, Loan Operations, Scholarship, Grants and START Saving Program, and TOPS are staffed only to those functions that are unique to those operations. These divisions are independent and the personnel and assets focused in those divisions are unique to those divisions.

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APPENDIX I

STRATEGIC LINKS

VISION 2020

The agency's Philosophy specifically integrates economic development as part of the agency's core beliefs:

"Education is the door to a productive and satisfying life for the residents of Louisiana." In addition, the implementation of the vision, mission, goals and objectives contained in the 2005-2010 Office of Student Financial Assistance Strategic Plan indirectly contribute to the attainment of the following goals and objectives outlined in Vision 2020:

- Vision 2020 Goal One:** To be a Learning Enterprise in which all Louisiana businesses, institutions, and citizens are actively engaged in the pursuit of knowledge
- Vision 2020 Objective 1.2** To improve the reading and math skills of every student by high school graduation
- Vision 2020 Objective 1.3** To have a highly qualified teacher in every classroom
- Vision 2020 Objective 1.4** To have student retention rates approaching 100 percent for Pre-K-12 and postsecondary education
- Vision 2020 Objective 1.5** To raise minority achievement levels to close the achievement gap between minorities and whites at all levels of education
- Vision 2020 Objective 1.6** To increase student achievement and the number of students completing courses in the following fields: science, engineering, information technology, and entrepreneurship
- Vision 2020 Objective 1.8** To have a competitive, well-integrated system of postsecondary education whose institutions have economic development as a component of their core missions
- Vision 2020 Objective 1.9** To make workforce education and technical training programs widely available at the secondary and postsecondary levels
- Vision 2020 Objective 1.10** To build a workforce with the education and skills necessary to meet the needs of business in a knowledge-based economy through flexible systems and responsive programs

Human Resource Policies That Are Helpful and Beneficial to Women and Families

The agency complies with the provisions of the Family Medical Leave Act. In addition, the agency's Human Resources Division coordinates flexible work schedules, diversity training, and domestic violence initiatives. In addition, the administration of the agency's programs that facilitate increased access to postsecondary education and outreach about financial assistance available are beneficial to women and families.

Children's Budget

The START Saving Program is part of the Children's Budget.