

OFFICE OF STUDENT FINANCIAL ASSISTANCE

STRATEGIC PLAN

FY 2016-2017 THROUGH FY 2020-2021

AGENCY NUMBER: 661

Adopted: July 14, 2015

OFFICE OF STUDENT FINANCIAL ASSISTANCE

VISION: Louisiana's First Choice for College Access.

MISSION: Starting with Middle School our mission is to facilitate the progression towards college access and success. By educating students and families about careers and the related college options, applying to attend college, showing up on campus and persisting beyond the first year.

PHILOSOPHY: Every person can benefit from postsecondary education/training if provided the right tools for college access and success.

VALUES:

Teamwork
Excellence
Service
Transparency

GOALS:

- I. To achieve and maintain the highest levels of service to our students, families, partners and constituents by implementing the 5-point match and System Feedback Loop.
- II. To serve as the primary state source for innovative on-line resources for college outreach and access.
- III. To connect through cooperative partnerships with federal, state and local organizations and stakeholders to provide access materials on educational and training opportunities/experiences for all categories of students to study, train and thrive in Louisiana.
- IV. To ethically, effectively and efficiently administer programs and services.
- V. To support student services and programs by maximizing revenues and seeking grant and/or other financial opportunities.

ADMINISTRATION AND SUPPORT SERVICES

MISSION: To provide direction and administrative support services for internal and external clients.

GOALS:

- I. To achieve and maintain the highest standards of service.
- II. To serve as the primary state source of student financial assistance programs, college access 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 augment student services and programs by maximizing federal and self-generated revenues.

PROGRAM ACTIVITY I: Executive Administration

Description:

This activity is performed by the senior management of the agency, which includes the Executive Director and Executive staff. This activity provides the overall supervision of the agency. This activity executes and enforces all decisions, orders, rules and regulations of the Louisiana Student Financial Assistance Commission (LASFAC) and the Louisiana Tuition Trust Authority (LATTA). In addition to the management and supervision of the agency, this activity provides liaison and coordination with outside organizations including but not limited to the Louisiana Board of Regents, State Board of Elementary and Secondary Education, Legislature, Division of Administration, Governor's Office and the U. S. Department of Education.

PROGRAM ACTIVITY OBJECTIVE I.1

Partner with the Board of Regents, the Board of Elementary and Secondary Education and other stakeholders in developing, growing and maintaining college access programs for residents of Louisiana.

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| STRATEGY I.1.1 | 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 I.1.2 | Maintain 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 I.1.3 | Include Board of Regents liaison when conducting Advisory Committee Meetings to provide input that contributes to the development of college access programs and student aid policy/plans. |
| STRATEGY I.1.4 | Maintain liaison with the Board of Elementary and Secondary Education and Department of Education that facilitates the development of state student aid policy, plans and programs that provide college access. |

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STRATEGY I.1.5 In partnership with stakeholders, develop programs and on-line resources to inform students, parents, teachers, counselors and school administrators of college access programs/opportunities that include student aid policy, plans and programs.

STRATEGY I.1.6 Work with Information Technology (IT) to provide clean data for utilization with Business Intelligence (BI) solutions to produce necessary historical, trend, performance and general data reports.

PERFORMANCE INDICATORS

Input: Data, research, and professional financial aid community input to enhance Board of Regents development of state student aid policy, plans and programs.

Output: Production of historical trend reports relative to agency program performance utilizing BI solutions.
Production of performance and general data on agency administered programs utilizing BI solutions.

Outcomes: A comprehensive service delivery plan that integrates LOSFA program offerings, and other sources of state, federal and institutional aid.
Provision of a comprehensive on-line resource for parents and students promoting college access information and the LOSFA 5-Point match.

Efficiency: Produce interactive BI solutions reports to showcase program performance data.
Development of statewide, concentrated and intensive services and programs that support the delivery of tiered outreach services related to college access and the provision of student aid.

PROGRAM ACTIVITY OBJECTIVE I.2

Be poised to solicit and acquire federal grant funding that complements the agency’s philosophy and mission to provide services to students. Acquire and maintain state funding to support the implementation of federal aid programs that require a state match and legislatively approved state financial aid programs.

STRATEGY I.2.1 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 I.2.2 Seek state appropriated funding from the legislature to implement the programs.

STRATEGY I.2.3 Seek private and federal grants to promote college access.

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.

PROGRAM ACTIVITY OBJECTIVE I.3

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Maximize federal revenues to the agency's Operating Fund annually.

- STRATEGY I.3.1 Closely monitor actual and projected revenues from outsourcing guaranty activities to a third party servicer.
- STRATEGY I.3.2 Seek state funding and support for state financial aid initiatives.
- STRATEGY I.3.3 Analyze the effectiveness of programs funded by federal revenues from the agency's Operating Fund.
- STRATEGY I.3.4 Pursue opportunities to obtain additional funding to provide students and families with the important front-end services (outreach, access, financial literacy, responsible borrowing, debt management and delinquency and default prevention) provided by guaranty agencies for student loans.

PERFORMANCE INDICATORS

- Input: Sufficient funding to support agency operations and state student financial aid programs.
- Output: Efficient, effective, successful and fully funded student financial aid programs that promote college access for all eligible students.
Additional revenue generated for the agency's Operating Fund.
- Outcome: Sufficient revenues to support state financial aid programs.
Equitable distribution of aid to eligible students.
- Efficiency: Maximization of revenues to augment or supplant funding for state student aid programs.

PROGRAM ACTIVITY OBJECTIVE I.4

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

- STRATEGY I.4.1 Create, publish, update and enforce agency policies and procedures for all operational and support functions.
- STRATEGY I.4.2 Ensure employees attend and participate in related industry/trade organizations.
- STRATEGY I.4.3 Ensure employees attend professional training sessions and continuing education programs.
- STRATEGY I.4.4 Closely coordinate with legislative staff and legislators.
- STRATEGY I.4.5 Conduct internal audits of operational and support functions.
- STRATEGY I.4.6 Prepare financials for the START Saving Program.
- STRATEGY I.4.7 Prepare financials for the FFELP.
- STRATEGY I.4.8 Prepare year-end financials for the agency.
- STRATEGY I.4.9 Update program rules to implement legislative changes and new programs.
- STRATEGY I.4.10 Ensure employees receive ethics training and subsequent refresher training.

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- STRATEGY I.4.11 Create, publish, update and enforce agency policies and procedures for the security and safeguarding of Personally Identifiable Information (PII), START Account Financial Information, and other student data.
- STRATEGY I.4.12 Ensure employees receive periodic training on the proper handling of PII and other sensitive personal data.

PERFORMANCE INDICATORS

- Input: Budget allocation for Administrative Support Services.
Periodic Employee Training.
- Output: Program Rules.
START Disclosure Statement and Supplements.
Federal Financial Reports.
Agency administrative costs of less than 4%.
Compliance of requirements found in applicable laws, statutes, policies and procedures.
- Outcome: 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 to Agency administrative cost.
- Quality: Number of Audit Findings minimized or eliminated.

PROGRAM ACTIVITY II: Agency Support Services

Description:

This activity is performed by (1) Fiscal and Administrative Services Division that provides payroll, accounts receivable and payable, mail services, purchasing and receiving, property control, federal and state reporting, budget control and financial management; (2) Information Technology (IT) Division that provides technical support and interfaces for agency divisions and clients and provides information to the public through the LOSFA website.; (3) Human Resources Division that recruits, maintains and supports a diverse, qualified and well-trained workforce to manage and administer federal and state student financial aid programs in compliance with state and federal laws; (4) Legal Division that provides, manages, and coordinates all legal services and minimizes legal risks and costs efficiently, reliably and professionally; and (5) Research and Planning that analyzes policy impacts, conducts research, tracks rulemaking process and provides cost information, (6) Field Outreach Services and Public Information Division that responds to incoming communications (including phone calls and Email inquiries); provides and presents LOSFA program information to students, parents, professional school counselors, college access organizations and faith-based organizations; formats and/or prepares and distributes LOSFA media releases, program bulletins and program promotional materials; helps students and families navigate the path to postsecondary education and federal and state aid for postsecondary education through statewide, intensive and concentrated outreach services.

PROGRAM ACTIVITY OBJECTIVE II.1:

To maintain administrative costs at less than 4% of the agency's total annual expenditures.

- STRATEGY II.1.1 Monitor administrative costs as related to budgeted costs on a monthly basis.

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STRATEGY II.1.2 Provide support for student services and programs for the development of grant submittals, monitoring financial status including compliance with approved budget and expenditure eligibility of all grants and advising the program director on an ongoing basis.

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

PERFORMANCE INDICATORS

Input: 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 to Agency administrative costs.

PROGRAM ACTIVITY OBJECTIVE II.2

Utilize technology to support the agency's initiatives and to disseminate pertinent information to end users.

STRATEGY II.2.1 Implement and evaluate information technology security precautions annually.

STRATEGY II.2.2 Collaborate with divisions to enhance or increase web content, digital communication, and social media marketing.

STRATEGY II.2.3 Provide comprehensive on-line access to parents and students for the purposes of tracking eligibility for and maintaining eligibility of program awards.

STRATEGY II.2.4 Collaborate with internal and external customers to maintain an integrated platform to support internal programs as well as programs operated on behalf of partners.

STRATEGY II.2.5 Maximize multiple means of communication to disseminate information effectively for the purpose of direct provision of information to students and families.

STRATEGY II.2.6 Facilitate reporting across programs to provide comprehensive data on multiple funding sources utilized by the students served.

STRATEGY II.2.7 Support performance reporting by maintaining clearly defined data dictionary in support of business intelligence (BI) initiatives.

STRATEGY II.2.8 Continue to work with Office of Technology Services (OTS) to maintain and support the network infrastructure and software to support the agency's functions.

STRATEGY II.2.9 Continue to test, maintain, and enhance the Disaster Recovery and Business Continuity Plan.

PERFORMANCE INDICATORS

Input: Updates to software and internal applications.

Annual review and update of security and other IT policies.

Implementation and integration of new technology.

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- Output: Increased access to and availability of on-line college access information.
Increased communication with parents and students via digital communications and social media marketing.
- Outcome: Percent change in web site utilization.
Increased capacity for students and parents to monitor and maintain eligibility for program awards.
Increased efficiency in processing all financial aid programs while maintaining the highest level of security.
- Efficiency: Increased productivity of agency's staff.
Increased capacity to produce program performance data for dissemination to stakeholders.

PROGRAM ACTIVITY OBJECTIVE II.3

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

- STRATEGY II.3.1 Partner with Civil Service to ensure that position titles allocated, fit the mission of the agency and provide appropriate incentives to retain qualified, well-trained, productive employees.
- STRATEGY II.3.2 Promote employment at LOSFA by utilizing web content, digital communication and social marketing, to maximize access to job announcements in order to ensure that the personality, attitude, experience and education of new hires are appropriate and represent the diverse population of the state.
- STRATEGY II.3.3 Develop partnerships with postsecondary institutions to facilitate student internships, graduate assistantships and community service opportunities for special projects across the agency.
- STRATEGY II.3.4 Continue to use technology resources to streamline Human Resources processes i.e. creating an "Employment Opportunity" link on the LOSFA Internet Home Page; implementing on-line Time and Attendance.
- STRATEGY II.3.5 Increase employee knowledge of LOSFA's role, scope and mission; the successes of LOSFA's programs; and LOSFA's opportunity to provide additional services. Implement lunch and learn sessions for supervisors to present comments and/or suggestions in an effort to sustain LOSFA's excellence.
- STRATEGY II.3.6 Promote cross-training within LOSFA Divisions and develop, implement and maintain strategies that focus not only on workforce and succession planning, but single-point sources of knowledge as well.
- STRATEGY II.3.7 Develop and implement low-cost initiatives that encourage and recognize outstanding employee performance and improves employee morale.
- STRATEGY II.3.8 Ensure supervisors complete mandatory Comprehensive Public Training Program requirements and any continuing education

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- requirements within the appropriate time-frame.
- STRATEGY II.3.9 Make certain employees have access to employee assistance programs, training opportunities, benefits information and job related educational opportunities.
- STRATEGY II.3.10 Conduct 100% of annual employee performance evaluations (PES) timely.
- STRATEGY II.3.11 Review and update agency policies and procedures to ensure they are helpful and beneficial to families and support work/life balance for all employees.

PERFORMANCE INDICATORS

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

PROGRAM ACTIVITY OBJECTIVE II.4

To provide, manage, and coordinate all legal services and minimize legal risks and costs, including the timely and consistent processing of TOPS Exceptions for students requesting exceptions to the TOPS initial and continuing eligibility requirements.

- STRATEGY II.1.1 Analyze federal and state legislation to determine and inform executive staff of the potential impact on agency-administered programs.
- STRATEGY II.1.2 Update program rules and administrative procedures to implement legislative changes and new programs
- STRATEGY II.1.3 Review agency publications prior to dissemination to ensure that they are current and accurate.
- STRATEGY II.1.4 Review and provide updates to appropriate division personnel on internal agency policies and procedures to ensure compliance with state and federal law and regulations.
- STRATEGY II.1.5 Negotiate and draft all agency consulting services contracts to ensure agency needs will be met and to ensure compliance with Office of State Procurement requirements.
- STRATEGY II.1.6 Track all phases of cancellations and exception processing, and identify trends that can be addressed through changes in procedures, rules or law.
- STRATEGY II.1.7 Maintain historical data to ensure consistency in exception processing.
- STRATEGY II.1.8 Utilize digital communications to communicate more effectively.
- STRATEGY II.1.9 Provide assistance in the development of training materials to ensure guidance provided to students is accurate and up-to-date.

PERFORMANCE INDICATORS

- Input: Annual number of Exceptions requests received.
- Output: Number of Exceptions requests processed by type.
- Outcome: Percentage change in Exceptions requests by type.

PROGRAM ACTIVITY III: Audit

Description:

The audit activity of the agency ensures that the agency and student financial aid program participants are in compliance with applicable laws and regulations by performing audits and reviews and providing technical assistance. This activity conducts reviews of its third party servicer in connection with the Agency's guarantor role in the Federal Family Education Loan Program as required by 34 CFR § 682.410(c) and audits of high schools and colleges participating in the Taylor Opportunity Program for Students (TOPS) and other scholarship and grant programs administered by the Agency, and internal audits of the agency. This activity performs reviews for individual's TOPS eligibility and cohort default rate challenges.

PROGRAM ACTIVITY OBJECTIVE III.1

Plan and perform audits to achieve at least a 90% annual compliance rate with statutes, regulations and directives.

- STRATEGY III.1.1 Based on statistical sampling and the time line for realization of this objective, annually select those high schools, colleges, and vendors (when applicable) to be audited for compliance with the legal mandates and management objectives for the scholarship and grant programs administered by the agency.
- STRATEGY III.1.2 Plan and perform audits to achieve at least a 95% confidence level in each audit.
- STRATEGY III.1.3 Annually conduct internal risk assessment and develop an internal audit plan, and perform selected internal audits to test department internal controls and provide consultation to program administrators.
- STRATEGY III.1.4 Work with the PIC and SG Divisions to supplement the training and guidance provided to colleges and high schools. Handouts and in-person participation at financial aid functions will be performed to help school personnel understand the areas of concern or program weaknesses discovered by the compliance reviews.
- STRATEGY III.1.5 Focus on high schools that have never been audited.
- STRATEGY III.1.6 Focus on high schools with low TOPS eligibility rates.
- STRATEGY III.1.7 Disseminate audit reports to interested parties.

PERFORMANCE INDICATORS

- Input: Number of audits planned to achieve compliance level.
- Output: Number of audits performed.
- Outcome: Compliance level determined by audits.
- Efficiency: Regulatory compliance and reduced audit findings.

PROGRAM ACTIVITY IV: Field Outreach Services and Public Information Division

Description:

This activity of the agency is critical to the agency's primary mission of providing college access. This activity provides the expert source of information on financial assistance programs that promote college access. This activity includes outreach services and marketing through the LOSFA Field Outreach Services and Public Information Division that disseminates college financing information through various media to the public, including to educational institutions, students and parents who participate in LOSFA administered programs. This activity includes outreach services that help Louisiana students and families navigate the path to postsecondary education and maintain federal and state aid during their postsecondary education.

PROGRAM ACTIVITY OBJECTIVE IV.1:

Utilize new technologies including email, text messaging, email-to-text, and social media messaging to increase efficiencies in responding to public inquiries that are less reliant on time consuming traditional communications.

- STRATEGY IV.1.1 Provide response team with new, more efficient technologies that sync with communication methods preferred by our target student audience that, by shifting the balance of response techniques away from traditional communications, provide staff with more time to interact directly with targeted students in the field while maintaining a 90% answer rate and a one business day response rate to all other constituent initiated communications.
- STRATEGY IV.1.2 Achieve and maintain adequate staffing.
- STRATEGY IV.1.3 Collaborate with Information Technology Division in developing online resources to provide information on agency programs to students, parents, and schools.
- STRATEGY IV.1.4 Utilize social media marketing to promote and publicize LOSFA outreach events, programs and initiatives.
- STRATEGY IV.1.5 Increase internal and external professional development of staff to increase professionalism in research driven college access strategies, verbal and written communication skills, and maximize employee productivity.

PERFORMANCE INDICATORS

- Input: Number of individuals available to respond to constituent initiated communications and constituent response to LOSFA initiated communications via email, text and social media messaging, email-to-text messaging and telephone contacts.
 - Number of incoming communications
 - Number of text, digital communications, and social media marketing sent
- Output: Number of responses to incoming communications
 - Number of responses to text and social media messages sent
- Outcome: Number of incoming communications answered within 1 business day or less

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Number of outgoing messages responded to by constituents

Increased awareness of LOSFA as a resource for all college access and financial assistance questions.

Number of texts received from students with additional questions.

Efficiency: Number of texts, social media messages, email, and email-to-text inquiries answered within 1 business day or less

Increased number of direct field interactions with students

PROGRAM ACTIVITY OBJECTIVE IV.2:

To provide program information and outreach services to increase students' and families' awareness of financial aid availability, help students and families apply for financial aid, and give TOPS retention requirements to 100% of target groups specified annually.

STRATEGY IV.2.1 Annually evaluate and select target groups from the following populations: 1) middle, high school, and college 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, civic groups, college access organizations and faith based organizations 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 IV.2.2 Develop and implement the plan for marketing the LOSFA portal and use social media to promote college access to students, families, counselors, college access organization and other stakeholders, including state agencies that provide related services, such as the Workforce Commission.

STRATEGY IV.2.3 Request funding to produce and distribute postsecondary financial aid, TOPS, and START Saving Program information to selected target groups.

STRATEGY IV.2.4 Continue annual Professional School Counselor Workshops to highlight College Access services.

STRATEGY IV.2.5 Continue Trailblazer Leadership Program.

STRATEGY IV.2.6 Continue to publish electronic newsletter, the LOSFA Loop.

STRATEGY IV.2.7 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 IV.2.8 Continue to provide training on all Agency programs to schools, postsecondary institutions and other interested parties in conjunction with the Louisiana Association of Student Financial Aid Administrators' Conferences and other industry meetings.

STRATEGY IV.2.9 Continue to supply content to update the Agency web site.

STRATEGY IV.2.10 Continue to support maintenance of the Student Transcript System to include 9 – 12th grade transcript reporting, in partnership with the

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- Board of Regents and the Louisiana Department of Education.
- STRATEGY IV.2.11 Strategically plan a geographical structure and calendar to provide annual Taylor Opportunity Program for Students (TOPS) Seminars for Parents.
- STRATEGY IV.2.12 Increase the number and frequency of TOPS Retention Seminars at postsecondary institutions.
- STRATEGY IV.2.13 Provide helpful tips on award retention requirements via text messaging.
- STRATEGY IV.2.14 Work one-on-one with students submitting follow up questions via text messaging.
- STRATEGY IV.2.15 Collaboratively sponsor College Goal Sunday and FAFSA Completion activities annually.
- STRATEGY IV.2.16 Provide financial literacy information to target groups through the agency's Financial Literacy for You (FLY) program.
- STRATEGY IV.2.17 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
Number of identified partnership locations
Number of College Goal Sunday/FAFSA completion locations
Size and scope of identified target groups and locations
- Output: Number of contacts made to entities within each target group for the purpose of scheduling training and/or outreach activities.
Number of targeted schools receiving outreach services.
Number of locations scheduled for training and/or outreach services.
Number of increased partnerships leading to training and/or outreach services.
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 group
- Outcome: Increased awareness and availability of and eligibility for financial aid and TOPS programs within the target groups.
Number of completed FAFSA applications by students in intensive and concentrated service schools.
Increased services provided to targeted schools over the previous year.
- Efficiency: Percentage of targeted groups receiving awareness information on availability and eligibility of financial aid and TOPS requirements.
Percentage of locations receiving FAFSA/College Goal Sunday assistance

PROGRAM ACTIVITY OBJECTIVE IV.3:

To engage and assist targeted students in completing the critical steps for college entry.

- STRATEGY IV.3.1 Provide students attending middle schools that serve as feeder schools to the LOSFA Intensive Services high schools with college access services and familiarize them with all aspects of LOSFA's 5-Point Match in assisting students in their college search through College Kick Off events and activities.
- STRATEGY IV.3.2 Annually collaborate with Intensive and Concentrated Service schools to host the Louisiana College Application Month and assist seniors in completing their college application.
- STRATEGY IV.3.3 Coordinate with Intensive and Concentrated Service schools to attend college visits at postsecondary institutions.
- STRATEGY IV.3.4 Develop and implement outreach programs for socio-economically disadvantaged and underrepresented individuals in programs administered by the Agency that involve the faith-based community.
- STRATEGY IV.3.5 Increase the awareness of LOSFA's 5-Point match concept.
- STRATEGY IV.3.6 Provide sample students with pre and post college access surveys to determine if students' postsecondary attendance attitude changed.
- STRATEGY IV.3.7 Partner with postsecondary institutions for hosting campus field trips.

PERFORMANCE INDICATORS

- Input: Number size, scope, and content of LOSFA College Kick Off event locations served.
Number size, scope, and content of Louisiana College Application Month locations served.
Number of pre and post college access surveys issued to targeted groups.
- Output: Number of contacts made to entities within each target group for the purpose of scheduling training and/or outreach activities.
Evidence that sufficient amounts of program information material was provided to reach 100% of individuals in the targeted groups.
Number of College applications completed by students in Intensive and Concentrated Service schools.
Increase in college access knowledge, as indicated by college access surveys completed by students and/or parents in intensive and concentrated service schools.
- Outcome: Increased participation in LOSFA College Kick Off events by students in Intensive and Concentrated Service schools.
Increased participation in Louisiana College Application Month by students in Intensive and Concentrated Service schools.
Increased participation of postsecondary institution campus field trips by students in Intensive and Concentrated Service schools.

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- Efficiency: Percentage of targeted groups receiving awareness of LOSFA's 5-Point match concept.
- Percentage of Intensive and Concentrated Service schools receiving assistance for Louisiana College Application Month.
- Percentage of changes in students' attitude receiving pre and post field trip surveys.
- Increase over the previous year, number of students that completed the FAFSA college application and increase the number of college acceptances by students in LOSFA's Intensive and Concentrated Service schools.

PROGRAM ACTIVITY OBJECTIVE IV.4

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

- STRATEGY IV.4.1 Annually reevaluate current target groups and plan for expansion of target groups to be selected.
- STRATEGY IV.4.2 Produce and distribute materials appropriate to the audience that includes changes to the Student Tuition Assistance and Revenue Trust (START) Saving Program.
- STRATEGY IV.4.3 Continue to publish a quarterly STARTing Line electronic newsletter.
- STRATEGY IV.4.4 Continue to supply content to update the Agency web site.
- STRATEGY IV.4.5 Continue annual START Saving Program Seminars.
- STRATEGY IV.4.6 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 IV.4.7 Continue to administer Rewards for Success program funds to encourage low-income families to use the START Savings Program to save for college.
- STRATEGY IV.4.8 Deliver START Saving Program electronic publications for prompt dissemination.
- STRATEGY IV.4.9 Secure state general funds to provide personnel, publications, advertising and information to market the START Saving Program.
- STRATEGY IV.4.10 Develop strategies for efficient distribution of marketing materials.

PERFORMANCE INDICATORS

- Input: Number of identified target groups.
- Number of identified target partnerships.
- Size and scope of identified target groups and partnerships.
- Output: Number of contacts made to entities within each target group for the purpose of scheduling training and/or outreach activities.
- Number of entities scheduled and receiving training and/or outreach activities.

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- Number of locations scheduled training and/or outreach activities
- Increase number of partnerships, trainings and/or outreach activities leading to partnerships.
- 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 START Saving Program by members of the targeted groups and partnerships.
- Efficiency: Percentage of targeted groups and partnerships receiving information on the START Savings Program.

PROGRAM ACTIVITY OBJECTIVE IV.5

To keep Legislators, Congressional delegation members and LASFAC, LATTA members updated on LOSFA events, initiatives and accomplishments.

STRATEGY IV.5.1 Weekly Email Legislative offices with details of upcoming LOSFA events at schools in their District.

STRATEGY IV.5.2 Regularly Email details of LOSFA activities and accomplishments to Louisiana's Congressional delegation.

PERFORMANCE INDICATORS

- Input: Number of incoming emails from legislators, Congressional delegation members, and LASFAC, LATTA members.
- Number of legislators and congressional delegation members notified of upcoming LOSFA events in their districts.
- Number of updates provided to legislators and Congressional delegation members.
- Output: Number of legislator and congressional delegation emails responded to within 1 business day.
- Number of legislators and congressional delegation members attending LOSFA events in their districts.
- Outcome: Percentage of email legislators and congressional delegation member responses.
- Percentage of legislators and congressional delegation members attending LOSFA events in their districts.
- Percentage of other inquiries (phone, letters, etc.)
- Efficiency: Email response rates to legislators and congressional delegation within 1 business day.

LOAN OPERATIONS

MISSION: To administer the Federal Family Education Loan (FFEL) program assigned to the Louisiana Student Financial Assistance Commission.

GOALS:

- I. To effectively and efficiently administer the FFEL program in compliance with statutory authority and regulations.
- II. To maximize program revenues from the Agency's administration of the FFEL program through the existing portfolio management servicing contractor.

PROGRAM ACTIVITY I: Loan Program Supervision

Description:

This activity combines the agency's previous Pre- and Post-Default program activities into one program activity, the supervision of FFEL program functions carried out by a third party servicer under a contract with the agency. The third party servicer performs all servicing functions throughout the life of a FFELP student loan for those loans that were guaranteed by LOSFA. These functions include: assisting lenders, loan servicers and delinquent borrowers in avoiding defaults on delinquent student loans; processing claims against the loan guarantee filed by lenders/loan servicers; ensuring that all claims scheduled for payment meet federal program requirements; maintaining inventory control of defaulted loans; engaging in collection activities to maximize recovery of defaulted loans; and ensuring compliance with program regulations.

The agency retains fees paid by the U. S. Department of Education for performance of these activities, less the amount charged by the third party servicer to perform these services.

Congress terminated the FFEL program, with no new student loans being originated after June 2010.

PROGRAM ACTIVITY OBJECTIVE I.1:

To maintain a reserve ratio that is greater than the minimum federal requirement of .25%.

STRATEGY I.1.1 Through competitive bidding, select the third party servicer that performs guaranty services at the highest level of efficiency with the lowest cost and greatest return to the agency.

PERFORMANCE INDICATORS

Input:	Reserve fund balance. Dollar value of outstanding loan guarantees. Monitor activities of third party servicer.
Output:	Reserve ratio – reserve fund balance/loan guarantees outstanding.
Outcome:	Compliance with federal requirements.
Efficiency:	Regulatory compliance and management indicator of performance.

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.

PROGRAM ACTIVITY I: Scholarship & Grant Program

Description:

This activity includes functions that are directly related to the administration of state and federal scholarship/grant programs and awards, grants and loans to students who qualify for state and/or federal scholarship and/or grant programs assigned to the Louisiana Student Financial Assistance Commission (LASFAC) and the Louisiana Office of Student Financial Assistance (LOSFA). This activity includes the Scholarship and Grant Division that is comprised of the TOPS Initial Eligibility Section, TOPS Renewal Section and Special Programs Section. The Initial Eligibility Section screens high school student records to determine their initial eligibility for a TOPS award. The Renewal Section screens the records of college students to determine continuing eligibility for a TOPS award and reviews and processes TOPS billings from colleges and universities checking for validity and accuracy. The Special Programs Section administers the Louisiana Go Grant, TOPS-Tech Early Start, federal/state grant programs (TOPS Teacher Repayment Tracking, Rockefeller Wildlife Scholarship, Chafee ETV, Strategies to Empower People (STEP), Supplemental Course Allocation (SCA), John R. Justice, and Paul Douglas) and other aid programs as assigned.

PROGRAM ACTIVITY OBJECTIVE I.1:

To achieve the lowest possible ratio of administrative expenses to dollars awarded as scholarship and grants, 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.

Outcome: Minimize program costs to maximize funding available to program participants.

Efficiency: Ratio of administrative costs to dollar value of scholarship and grant programs less than 4%.

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PROGRAM ACTIVITY OBJECTIVE I.2

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

- STRATEGY I.2.1 Collaborate with the Board of Regents and postsecondary education community to simplify the identification of qualified recipients and the distribution of funds.
- STRATEGY I.2.2 Coordinate with the Information Technology Division to develop computer software to automate and to facilitate administration of scholarships, grants and incentives programs.
- STRATEGY I.2.3 Closely monitor available appropriated funds.
- STRATEGY I.2.4 Develop and implement procedures to retrieve unused funds for redistribution and disbursement.
- STRATEGY I.2.5 Continue to provide training materials, webinars and provide in person training sessions for appropriate postsecondary school staff, students and their families on scholarship and grant programs administered by LOSFA.
- STRATEGY I.2.6 Identify barriers and inefficiencies that prevent students from qualifying for and receiving financial aid and implement services and procedures to address those barriers.
- STRATEGY I.2.7 Research student aid related issues and develop training for field outreach staff.

PERFORMANCE INDICATORS

- Input: State general funds, federal funds and any other funds appropriated by program for scholarships, grants and incentives for postsecondary education.
- Output: State general funds, federal funds and any other funds paid out by program for scholarships, grants and incentives for postsecondary education.
- Outcome: Make postsecondary education affordable through financial aid programs administered by LOSFA.
Increase access by providing training to students and parents on postsecondary topics.
Increase the number of students receiving postsecondary educations through funding provided by LOSFA.
- Efficiency: Maximize the number of students receiving postsecondary education at the lowest cost to the state.

PROGRAM ACTIVITY II: Saving Programs

Description:

This activity includes functions that are directly related to the administration of the state's Student Tuition Assistance and Revenue Trust Program, commonly referred to as the "START Saving Program," and the Achieving a Better Life Experience (ABLE) Saving Program.

The START Saving Program is assigned to the Louisiana Tuition Trust Authority (LATTA) and the Louisiana Office of Student Financial Assistance (LOSFA). This activity includes LOSFA's START

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Division that performs essential customer service duties to service and maintain START accounts in order to maximize the opportunities for an increased number of students to pursue their postsecondary educational goals and to help families contend with the growing costs of a college education.

The ABLÉ Saving Program is assigned to the ABLÉ Account Authority. The ABLÉ Account Authority under R. S. 17:3093.1 is authorized to enter into any contract, memorandum of understanding, or other type of agreement as may be necessary to provide for the co-location of administrative and clerical functions and concurrent operation and management of the START Program and the ABLÉ Account Program. This activity is anticipated to include essential customer service duties by LOSFA's START Division to service and maintain ABLÉ accounts in accordance with an agreement with the ABLÉ Account Authority.

This activity also includes the funding for the payment of Earnings Enhancements. Under the state's START Savings Program, a savings account for college, called an Education Savings Account (ESA), may be opened on behalf of a named beneficiary by anyone, including legal entities, provided that the account owner or beneficiary is a resident of Louisiana. Account owners invest with the state their personal funds with the benefit of having their money professionally managed. In addition, as an incentive to save, the state of Louisiana annually matches a percentage of the deposits made to an account during the calendar year, depending upon the category into which the account has been classified and the federal adjusted gross income reported by the account owner for the previous year. This match is called an Earnings Enhancement and this activity includes funding to pay the Earnings Enhancement match. The activity does not include any of the money invested by account owners.

PROGRAM ACTIVITY OBJECTIVE II.1

To achieve or exceed the projected Student Tuition Assistance and Revenue Trust (START) Saving Program participation of 80,000 active accounts and principal deposits of \$1,000,000,000 by the end of the 2020/2021 State Fiscal Year.

- STRATEGY II.1.1 In cooperation with the Field Outreach Services and Public Information Division, expand the marketing plan to advertise START as a college access tool.
- STRATEGY II.1.2 Update and distribute START pamphlets, applications, disclosure documents and financials, as required.
- STRATEGY II.1.3 Coordinate with and assist Field Outreach Services and Public Information Division to increase outreach activities.
- STRATEGY II.1.4 Continue improvement of the START Web Site to enhance interactive usage by START account owners/beneficiaries.
- STRATEGY II.1.5 Plan and implement a campaign to increase philanthropic donations to Category 6 Accounts as a means of assisting students with extreme financial need.
- STRATEGY II.1.6 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 accounts and dollar value of principal deposits.
START Savings fund disbursements.

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- Outcome: Encourages family planning and saving for postsecondary educational expenses.
Reduces reliance on student loans.
Increases access to post-secondary education.
- Efficiency: Ability to attract investors and maximize their investments.

PROGRAM ACTIVITY OBJECTIVE II.2

To implement start-up procedures and on-going operations and details for the recent federal and state regulations titled “Achieving a Better Life Experience (ABLE Act)” in accordance with Public Law 113-295, Sections 101 thru 105, inclusive, passed December 19, 2014 and Louisiana Revised Statutes 17:3093.1 and 46:1722 through 46:1730.

- STRATEGY II.2.1 Receive Rules & Regulations that will outline laws and operations of ABLE accounts from the Authority appointed to oversee the ABLE Act.
- STRATEGY II.2.2 Request Thought Span to prepare software for the AS400 for the Able Act using the guidelines written for the START Saving Program adjusting for the differences in the appropriate statutes.
- STRATEGY II.2.3 Contact Vanguard regarding new ABLE investment accounts when directed by the State Treasurer.
- STRATEGY II.2.4 Prepare in-house procedures for implementing the ABLE Act.
- STRATEGY II.2.5 Prepare forms as needed for implementation of the ABLE Act
- STRATEGY II.2.6 Train START and other agency employees on the differences in the two separate programs.
- STRATEGY II.2.7 Begin opening accounts and accepting deposits.
- STRATEGY II.2.8 Establish Performance Indicators

PERFORMANCE INDICATORS (These Performance Indicators will be tracked once the ABLE Accounts are fully functional)

- Input/Output: Number of accounts and dollar value of principal deposits.
ABLE Account disbursements.
- Outcome: Encourages family planning and saving for the financing of certain qualified expenses of persons with disabilities.
Promotes economic self-reliance.
- Efficiency: Ability to attract investors and maximize their investments.

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.

PROGRAM ACTIVITY I: TOPS Program

Description:

This activity includes awards to students who qualify for the state's Taylor Opportunity Program for Students (TOPS) merit based scholarship program. This activity (as of the date of this Plan) includes expenditures for the following awards: 1) TOPS Honors Award (tuition plus \$800 for not more than 8 semesters, minimum eligibility requirements of a 3.0 high school GPA on core subjects, 19 core units and a composite score of 27 on the ACT); 2) TOPS Performance Award (tuition plus \$400 for not more than 8 semesters, minimum eligibility requirements of a 3.0 high school GPA on core subjects, 19 core units and a composite score of 23 on the ACT); 3) TOPS Opportunity Award (tuition for not more than 8 semesters, minimum eligibility requirements of a 2.5 high school GPA on core subjects, 19 core units and a composite ACT score equal to the state average score, currently 20); 4) TOPS Tech Award (tuition for not more than 2 years, minimum eligibility requirements of a 2.5 high school GPA on core subjects, 17 or 19 core units and a composite score of 17 on the ACT); and 5) TOPS-Tech Early Start Award (provides funding for high school Juniors and Seniors to pursue an industry-based occupational or vocational education credential in an eligible program. The award provides a maximum tuition payment of \$300 per semester for 4 semesters for eligible students); and 6) Louisiana National Guard member education benefits (these students receive \$300 per semester toward the cost of books and instructional materials in lieu of a TOPS tuition payment. National Guard members eligible for a TOPS Performance or Honors Award also receive a stipend payment of \$800 or \$1,600 per year, respectively). This activity includes only awards to students and not administrative expenses.

PROGRAM ACTIVITY 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 on an as needed basis to disseminate information on the TOPS award process, deadlines, rules governing student eligibility and 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. |

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STRATEGY 1.1.6 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 1st of their application year.

PROGRAM ACTIVITY 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.

PROGRAM ACTIVITY OBJECTIVE I.3

To increase awareness of the TOPS Tech and TOPS Tech Early Start Programs and the value of pursuing postsecondary education in high demand technical careers.

STRATEGY I.3.1 Increase awareness of schools, students and parents of TOPS Tech and TOPS Tech Early Start eligible fields of study.

STRATEGY I.3.2 Collaborate with the LA Workforce Education Initiative to promote the value of technical education and the financial aid available to pay for the program of study.

STRATEGY I.3.3 Facilitate training of field outreach staff on opportunities related to TOPS Tech and TOPS Tech Early Start.

STRATEGY I.3.4 Educate schools, students and parents about the alignment of the TOPS

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Tech and career option diploma.
STRATEGY I.3.5 Promote the usage of TOPS Tech Early Start while still in high school as a pathway to a high paying career.

PERFORMANCE INDICATORS

Input: Dollar value of TOPS Tech and TOPS Tech Early Start.
Number of students eligible for TOPS Tech and TOPS Tech Early Start.
Output: Number of students receiving TOPS Tech and TOPS Tech Early Start funding.
Outcome: Increase in students receiving technical training.
Efficiency: Maximizing the number of students receiving technical training.

APPENDICES

APPENDIX A - SERVICES AND CLIENTS

APPENDIX B - EXTERNAL AND INTERNAL FACTORS

APPENDIX C - STATUTORY AUTHORITY

APPENDIX D - PROGRAM EVALUATION

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APPENDIX A

SERVICES AND CLIENTS

A. ADMINISTRATION AND SUPPORT SERVICES

Administration and Support Services is composed of four program activities with a primary mission to provide service and support to the operating divisions of the Agency (Loan Operations (outsourced), Scholarship/Grant Division and START Savings Division), the Louisiana Student Financial Assistance Commission and the Louisiana Tuition Trust Authority.

The **Executive Administration Program Activity** includes the senior management of the agency, the Executive Director and Executive Staff.

The **Agency Support Services Program Activity** includes the following:

- a. Fiscal and Administrative Services Division
- b. Information Technology (IT) Division
- c. Human Resources Division
- d. Legal Division
- e. Research/Planning

The **Fiscal and Administrative Services Division** provides accounting, budgeting, purchasing, records management and mailroom services for the Agency. The Division is responsible for administrative oversight of the third party servicer performing Loan Operations activities under an outsourcing contract.

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 **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 and provides records management.

Research/Planning provides research and analysis of data to be used in program planning and tracking, cost estimation and projection, and the conceptual development and administrative phase of rule promulgation, as applicable, for the programs administered by the Agency.

The **Audit Program Activity** is performed by the Audit Division that performs the agency's audit function to ensure that educational institutions are in compliance with federal and state regulations related to the programs in which they participate.

The **Field Outreach Services and Public Information Division Activity** provides outreach services and marketing that disseminates college financing information through various media to the public, educational institutions, students and parents and helps Louisiana students and families navigate the

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path to postsecondary education and maintain federal and state aid during their postsecondary education.

B. LOAN OPERATIONS (OUTSOURCED)

Loan Operations administers the Federal Family Education Loan Program (FFELP) for the State of Louisiana that guaranteed loans made by eligible lenders to students enrolled in schools that participate in the FFELP through June 30, 2010. Although no new FFELP loans have been originated since June 30, 2010, LOSFA remains responsible under contract to the United States Department of Education for the portfolio of outstanding loans originally guaranteed by LOSFA.

Beginning July 1, 2012, LOSFA outsourced the performance of its Loan Operations activities to a third party servicer. The third party servicer assists lenders in keeping loans current that are in repayment, purchases defaulted loans from lenders by paying the guarantee and collects on defaulted loans that have been purchased under the guarantee.

C. SCHOLARSHIP, GRANT AND SAVINGS

Scholarship, Grant and Savings consists of program activities that provide funding to facilitate college access.

The **Scholarship & Grant Program Activity** is performed by the Scholarship/Grant Division. The Division administers all state/and federal grant and scholarship programs assigned to the agency. 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. This activity includes the following funded programs and other programs that are not funded but are still permitted under current revised statutes, administrative rules or policy:

Funded Programs:

- a. Rockefeller State Wildlife Scholarship Program – a state program that provides annual scholarship awards of \$2,000 each for undergraduate study and \$3,000 each for graduate study to Louisiana residents engaged in the study of wildlife, forestry or marine science at Louisiana colleges and universities.
- b. Taylor Opportunity Program for Students (TOPS) – 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 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.
- c. 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.
- d. The John R. Justice (JRJ) Grant Program – a federal program that awards grants to repay Stafford and other federal student loans for prosecutors and public defenders. Prosecutors and public defenders may be eligible to receive up to \$10,000 per calendar year, but no more than \$60,000, to repay outstanding Stafford, federal Direct and federal Perkins loans.

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- e. Chafee Educational and Training Voucher (ETV) Program – a federally program that provides grants to certain students who have been in the foster care system to pursue postsecondary education or training to enter the workforce.
- f. Strategies to Empower People (STEP) – a federal program for qualified Department of Children and Family Services (DCFS) recipients who need adult education and/or vocational training.
- g. Supplemental Course Allocation (SCA) – state program that allows high school students to take third party courses that are approved by the Louisiana Department of Education (LADOE).

Unfunded Programs:

- h. 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.
- i. 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. The program has not been funded since the 2000-2001 academic year, but the agency must assure that former recipients complete their obligation by teaching or repayment.
- j. 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 care shortage area in the State.
- k. 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.
- l. Louisiana Grant Opportunity for Youth ChalleNGe Skills Training Program – provides tuition for occupational and skill education for graduates of the Louisiana National Guard's Youth ChalleNGe Program who received a Louisiana High School Equivalency Diploma (GED).
- m. Guarantee of Nursing School Loans – provides dischargeable loans for certain nursing students.
- n. 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.
- o. 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.
- 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.
- q. Louisiana 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

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Louisiana public high school students to prepare for a postsecondary education or career.

The **Saving Programs Activity** is performed by the Saving Programs Division. The Division administers the following state savings programs:

- a. Louisiana Student Tuition Assistance and Revenue Trust (START) Saving Program – a qualified tuition plan under Section 529 of the Internal Revenue Code, which provides a tax sheltered college savings plan with investments managed by the State Treasurer. The program provides a state match (Earning Enhancements or EE's) for deposits as an incentive for families to save for the projected future costs of postsecondary education.
- b. Achieving a Better Life Experience (ABLE) Account Program – a tax sheltered savings plan used to pay for certain expenses (such as housing, transportation, employment training and support, health and wellness, assistive technology and personal support services, legal fees, oversight and monitoring, and funeral and burial costs) for a qualified person with disabilities with investments managed by the State Treasurer. **Note:** R. S. 17:3093.1 authorizes the ABLE Account Authority to enter into any contract, memorandum of understanding, or other type of agreement as may be necessary to provide for the co-location of administrative and clerical functions and concurrent operation and management of the START Program and the ABLE Account Program. This plan assumes that an agreement will be signed during the 2015-2016 state fiscal year. Performance Indicators will be tracked once the ABLE Accounts are fully functional.

D. TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

The Taylor Opportunity Program for Students (TOPS) activity is performed by the Scholarship/Grant Division. The Division manages the distribution of the funds appropriated for TOPS awards. 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 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 eligible programs while still in high school. The activity includes TOPS Honors, Performance, Opportunity, Tech and TOPS Tech Early Start awards. It also includes funding to pay book fees and TOPS Performance and Honors Award stipends to eligible members of the Louisiana National Guard.

APPENDIX B

EXTERNAL FACTORS

The programs administered by the agency and their funding will be subject to any financial aid plan for the state that is developed by the Board of Regents.

New student aid programs and extensive revisions of existing programs could be enacted without authorizing the agency additional resources to administer them.

Tuition will continue to increase faster than family income, which means the demand for all forms of student aid will grow.

For academically qualified but needy students, there is a continually growing gap between cost of attendance and available aid.

Maintenance of the Student Transcript System (STS) is essential to the continuation of the agency's automated scholarship award process.

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.

Changes to the Higher Education Act were adopted by Congress that eliminated new student loans under the Federal Family Education Loan Program (FFELP) and will reduce federal revenues to the agency as FFELP is phased out over time.

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.

Appropriations for the GO Grant program has been less than needed to provide all eligible students with financial assistance.

INTERNAL FACTORS

Projected retirements and turnover of key staff members could adversely affect the agency's depth of experience and level of expertise.

The legislature's continual changes and expansion of the Taylor Opportunity Program for Students (TOPS) has complicated program administration and confused parents and students.

Maintenance of diversification within the agency's executive staff is necessary to assure that the perspectives of major populations within the state are represented.

Lack of authority and funding for the agency's staffing requirements has placed excessive burdens on key staff members and threatens the quality of services provided to students.

To maintain a high level of service, the agency will have to continue using revenues from its administration of the Federal Family Education Loan Program (FFELP) or its successor to supplant shortfalls in general fund appropriations.

APPENDIX C

STATUTORY AUTHORITY

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

- a. 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.
- b. 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.
- c. 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.
- d. 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.
- e. 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.
- f. 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.
- g. LSA-R.S. 17:427.3 – establishes the Teach Louisiana First Program to be administered by the Louisiana Student Financial Assistance Commission.
- h. LSA-R.S. 17:3023(B) – requires the Louisiana Student Financial Assistance Commission to establish an internal audit function and an office of the chief audit executive who shall be responsible for ensuring that the internal audit function adheres to the Institute of Internal Auditors, International Standards for the Professional Practice of Internal Auditing.
- i. 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.
- j. 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.
- k. 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.
- l. 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.

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- m. 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.
- n. LSA-R.S. 17:3046 *et seq.* - establishes the Louisiana GO Grant program to be administered by the Louisiana Student Financial Assistance Commission in conjunction with the Board of Regents.
- o. 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.
- p. LSA-R.S. 17:3093 - creates the Louisiana Tuition Trust Authority.
- q. 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.
- r. LSA-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.
- s. LSA-R.S. 17:5001 *et seq.* – establishes the Louisiana Taylor Opportunity Program for Students (TOPS) to be administered by the Louisiana Student Financial Assistance Commission. Act 227 of the 2015 Regular Session of the Louisiana Legislature repealed and replaced the original TOPS provisions found in LSA-R.S. 17:3048.1 *et seq.*
- t. 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.
- u. LSA-R.S. 56:797.D(2) - establishes the Rockefeller Foundation Scholarship fund to be administered by the Louisiana Student Financial Assistance Commission.
- v. 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.
- w. Memorandum of understanding by and between the Louisiana Department of Children and Family Services (DCFS) and the Louisiana Student Financial Assistance Commission (LASFAC) – provides for the administration of the federal Chafee Education Training Voucher Program in conjunction with DCFS.
- x. Memorandum of understanding by and between the Louisiana Department of Children and Family Services (DCFS) and the Louisiana Student Financial Assistance Commission (LASFAC) – provides for the administration of the federal Strategies to Empower People (STEP) Program for qualified Department of Children and Family Services (DCFS) recipients who need adult education and/or vocational training in conjunction with DCFS.
- y. Memorandum of understanding by and between the Louisiana Department of Children and Family Services (DCFS) and the Louisiana Student Financial Assistance Commission (LASFAC) – provides for the administration of the Supplemental Course Allocation (SCA) Program that allows high school students to take third party courses that are approved by the Louisiana Department of Education (LADOE).

APPENDIX D

PROGRAM EVALUATION

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.

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.

Analysis of industry data from other agencies, lenders and loan servicers produces comparative information for benchmarking the agency's performance.

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 and educational services for themselves or their family members for pursuit of a postsecondary education.
2. Educational institutions.
3. Louisiana employers seeking a pipeline of Louisiana workers.
4. State agencies that provide related services or seeking assistance in providing administration of programs that provide preparation/financial assistance leading to college access.

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

Executive Administration Program Activity

- OBJECTIVE I.1 Development of statewide, concentrated and intensive services and programs that support the delivery of tiered outreach services related to college access and the provision of student aid.
- OBJECTIVE I.2 Implementation and evaluation of the funded programs
- OBJECTIVE I.3 Maximization of Revenues to augment or supplant funding for state student aid programs
- OBJECTIVE I.4 Agency administrative costs of less than 4%

Agency Support Services Program Activity

- OBJECTIVE II.1 Agency administrative costs of less than 4% (S)
- OBJECTIVE II.2 Increased access to and availability of on-line college access information
Increased communication with parents and students via digital communications and social media marketing
- OBJECTIVE II.3 Human Resources Review
- OBJECTIVE II.4 Annual number of Exceptions requests received
Number of Exceptions requests processed by type
Percentage change in Exceptions requests by type

Audit Program Activity

- OBJECTIVE III.1 Number of audits planned to achieve compliance level
Number of audits performed (K)
Compliance level determined by audits (K)
Number of TOPS Individual Reviews (G)
Number of START School Reviews (G)
Intervention Services (G)

Field Outreach Services and Public Information Division Activity

- OBJECTIVE IV.1 Number of texts, social media messages, emails, and email-to-text inquiries answered within 1 business day or less
Increased number of direct field interactions with students
- OBJECTIVE IV.2 Number of targeted schools receiving outreach services.
Number of locations scheduled for training and/or outreach services
Number of increased partnerships leading to training and/or outreach services.
Number of people attending training and outreach activities
- OBJECTIVE IV.3 Number of College applications completed by students in Intensive and Concentrated Service schools

Increase over the previous year, number of students that completed the FAFSA college application and increase the number of college acceptances by students in LOSFA's Intensive and Concentrated Service schools
- OBJECTIVE IV.4 Number of entities scheduled and receiving training and/or outreach activities
Number of locations scheduled training and/or outreach activities

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- Increase number of partnerships, trainings and/or outreach activities leading to partnerships.
- Number of people attending training and outreach activities
- OBJECTIVE IV.5 Number of legislator and congressional delegation emails responded to within 1 business day
- Number of legislators and congressional delegation members attending LOSFA events in their districts

LOAN OPERATIONS

Loan Program Supervision Activity

- OBJECTIVE I.1 Reserve Ratio – reserve balance/loans outstanding (K)
- Reserve fund balance
- Dollar value of Outstanding Loan Guarantees
- Monitor Activities of Third Party Servicer
- Official 3-Year Cohort Default Rate (G)
- Official Default Trigger Rate (G)
- Number of Defaulted loans rehabilitated (G)
- Dollar value of Defaulted loans rehabilitated (G)
- Recovery rate on default collections (G)

SCHOLARSHIP, GRANT AND SAVING PROGRAM

Scholarship & Grant Program Activity

- OBJECTIVE I.1 Ratio of administrative costs to dollar value of scholarship and grant programs less than 4% (S)
- OBJECTIVE I.2 Number of recipients: Rockefeller (G)
- Total Appropriated: Rockefeller (G)
- Total Awarded: Rockefeller (G)
- Average Amount Awarded: Rockefeller (G)
- Louisiana GO Grant recipients (G)
- Total Appropriated: Louisiana GO Grants (G)
- Total Awarded: Louisiana GO Grants (G)
- Louisiana GO Grant Average Award (G)

Saving Programs Activity

- OBJECTIVE II.1 Number of START Accounts (K)
- Principal START Account Deposits (K)
- START Savings Fund disbursements (G)
- OBJECTIVE II.2 Number of ABLE Accounts
- Principal ABLE Account Deposits

TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

TOPS Program Activity

- OBJECTIVE I.1 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)
- 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)
- OBJECTIVE I.3 Number of students receiving TOPS Tech and TOPS Tech Early Start funding (S)

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Total amount awarded (G)
Total number of award recipients (G)
Number 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: TOPS Tech (G)
Average Amount Awarded: TOPS Tech Early Start (G)
Teacher Prep Loan Fund: Total number of recipients (G)
Teacher Prep Loan Fund: Total amount awarded (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)

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ADMINISTRATION AND SUPPORT SERVICES

PERFORMANCE INDICATOR MATRIX

PROGRAM OBJECTIVE	INPUTS	OUTPUTS	OUTCOMES	EFFICIENCY/QUALITY
Executive Administration Program Activity				
I.1	Data, research, and professional financial aid community input to enhance Board of Regents development of state student aid policy, plans and programs	Production of historical trend reports relative to agency program performance utilizing BI solutions Production of performance and general data on agency administered programs utilizing BI solutions	A comprehensive service delivery plan that integrates LOSFA program offerings, and other sources of state, federal and institutional aid Provision of a comprehensive on-line resource for parents and students promoting college access information and the LOSFA 5-Point match	Produce interactive BI solutions reports to showcase program performance data Development of statewide, concentrated and intensive services and programs that support the delivery of tiered outreach services related to college access and the provision of student aid
I.2	Gathering of data relative to fiscal impact of the programs and economic benefit to the state	A business plan outlining the potential benefits to be derived by funding each program	Receipt of funding for programs	Implementation and evaluation of the funded programs
I.3	Sufficient funding to support agency operations and state student financial aid programs	Efficient, effective, successful and fully funded student financial aid programs that promote college access for all eligible students Additional revenue generated for the agency's Operating Fund	Sufficient revenues to support state financial aid programs Equitable distribution of aid to eligible students	Maximization of revenues to augment or supplant funding for state student aid programs
I.4	Budget Allocation for Administrative Support Services Periodic Employee Training	Program Rules START Disclosure Statement and Supplements Federal Financial Reports Agency administrative costs of less than 4% Compliance of requirements found in applicable laws, statutes, policies and	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 to Agency administrative cost Number of Audit Findings minimized or eliminated

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PROGRAM OBJECTIVE	INPUTS	OUTPUTS	OUTCOMES	EFFICIENCY/QUALITY
		procedures		
Agency Support Services Program Activity				
II.1	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 to Agency administrative cost
II.2	Updates to software and internal applications Annual review and update of security and other IT policies Implementation and integration of new technology	Increased access to and availability of on-line college access information Increased communication with parents and students via digital communications and social media marketing	Percent change in web site utilization Increased capacity for students and parents to monitor and maintain eligibility for program awards Increased efficiency in processing all financial aid programs while maintaining the highest level of security	Increased productivity of agency's staff Increased capacity to produce program performance data for dissemination to stakeholders
II.3	Number of positions eligible for performance review Number of supervisors requiring training	Number of supervisors completing required training	Retention rate of employees Completion rate of PESs	Percentage of compliance based upon Civil Service program requirements Diversity characteristics of hires and promotions compared to diversity characteristics of qualified available applicants
II.4	Annual number of Exceptions requests received	Number of Exceptions requests processed by type	Percentage change in Exceptions requests by type	
Audit Program Activity				
III.1	Number of audits planned to achieve compliance level	Number of audits performed	Compliance level determined by audits	Regulatory compliance and reduced audit findings

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PROGRAM OBJECTIVE	INPUTS	OUTPUTS	OUTCOMES	EFFICIENCY/QUALITY
Field Outreach Services and Public Information Division Activity				
IV.1	<p>Number of individuals available to respond to constituent initiated communications and constituent response to LOSFA initiated communications via email, text and social media messaging, email-to-text messaging and telephone contacts.</p> <p>Number of incoming communications</p> <p>Number of text, digital communications, and social media marketing sent</p>	<p>Number of responses to incoming communications</p> <p>Number of responses to text and social media messages sent</p>	<p>Number of incoming communications answered within 1 business day or less</p> <p>Number of outgoing messages responded to by constituents</p> <p>Increased awareness of LOSFA as a resource for all college access and financial assistance questions</p> <p>Number of texts received from students with additional questions</p>	<p>Number of texts, social media messages, email, and email-to-text inquiries answered within 1 business day or less</p> <p>Increased number of direct field interactions with students</p>
IV.2	<p>Number of identified target groups</p> <p>Number of identified partnership locations</p> <p>Number of College Goal Sunday/FAFSA completion locations</p> <p>Size and scope of identified target groups</p>	<p>Number of contacts made to entities within each target group for purpose of scheduling training and/or outreach activities</p> <p>Number of targeted schools receiving outreach services</p> <p>Number of locations scheduled for training and/or outreach activities</p> <p>Number of increased partnerships leading to training and/or outreach services</p> <p>Number of people attending training and/or outreach services</p> <p>Evidence that sufficient amounts of program information material was provided to reach 100% of individuals in the targeted groups</p>	<p>Increased awareness of availability of and eligibility for financial aid and TOPS programs within the target groups.</p> <p>Number of completed FAFSA applications by students in intensive and concentrated service schools.</p> <p>Increased services provided to targeted schools over the previous year.</p>	<p>Percentage of targeted groups receiving awareness information on availability and eligibility of financial aid and TOPS requirements</p> <p>Percentage of locations receiving FAFSA/College Goal Sunday assistance</p>
IV.3	<p>Number size, scope, and content of LOSFA College Kick Off event locations served.</p>	<p>Number of contacts made to entities within each target group for the purpose of scheduling training and/or outreach activities.</p>	<p>Increased participation in LOSFA College Kick Off events by students in Intensive and Concentrated</p>	<p>Percentage of targeted groups receiving awareness of LOSFA's 5-Point match concept</p>

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PROGRAM OBJECTIVE	INPUTS	OUTPUTS	OUTCOMES	EFFICIENCY/QUALITY
	<p>Number size, scope, and content of Louisiana College Application Month locations served.</p> <p>Number of pre and post college access surveys issued to targeted groups.</p>	<p>Evidence that sufficient amounts of program information material was provided to reach 100% of individuals in the targeted groups</p> <p>Number of College applications completed by students in Intensive and Concentrated Service schools</p> <p>Increase in college access knowledge, as indicated by college access surveys completed by students and/or parents in intensive and concentrated service schools.</p>	<p>Service schools.</p> <p>Increased participation in Louisiana College Application Month by students in Intensive and Concentrated Service schools</p> <p>Increased participation of postsecondary institution campus field trips by students in Intensive and Concentrated Service schools.</p>	<p>Percentage of Intensive and Concentrated Service schools receiving assistance for Louisiana College Application Month</p> <p>Percentage of changes in students' attitude receiving pre and post field trip surveys</p> <p>Increase over the previous year, number of students that completed the FAFSA college application and increase the number of college acceptances by students in LOSFA's Intensive and Concentrated Service schools</p>
IV.4	<p>Number of identified target groups</p> <p>Number of identified target partnerships</p> <p>Size and scope of identified target groups and partnerships</p>	<p>Number of contacts made to entities within each target group for purpose of scheduling training and/or outreach activities</p> <p>Number of entities scheduled and receiving training and/or outreach activities</p> <p>Number of locations scheduled training and/or outreach activities</p> <p>Increase number of partnerships, trainings and/or outreach activities leading to partnerships</p>	<p>Increased participation in START Saving Program by members of the targeted groups and partnerships</p>	<p>Percentage of targeted groups and partnerships receiving information on the START Savings Program</p>
IV.5	<p>Number of incoming emails from legislators, Congressional delegation members, and LASFAC, LATA members.</p>	<p>Number of legislator and congressional delegation emails responded to within 1 business day.</p>	<p>Percentage of email legislators and congressional delegation member responses.</p> <p>Percentage of other inquiries (phone, letters, etc.)</p>	<p>Email response rates to legislators and congressional delegation within 1 business day</p>

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PROGRAM OBJECTIVE	INPUTS	OUTPUTS	OUTCOMES	EFFICIENCY/QUALITY
	<p>Number of legislators and congressional delegation members notified of upcoming LOSFA events in their districts.</p> <p>Number of updates provided to legislators and Congressional delegation members.</p>	<p>Number of legislators and congressional delegation members attending LOSFA events in their districts.</p>	<p>Percentage of legislators and congressional delegation members attending LOSFA events in their districts.</p>	

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES

Program Activity: Executive Administration

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.1

Indicator Name: Development of statewide, concentrated and intensive services and programs that support the delivery of tiered outreach services related to college access and the provision of student aid.

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 in the 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 tracks the efforts of the agency in the 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 initiatives in the student financial aid area.
10. Responsible Person: Contact Gus Wales, Division Director, Field Outreach Services and Public Information Division, Phone: 225-219-7576; FAX: 225-208-1496; Email: gus.wales@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES

Program Activity: Executive Administration

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.2

Indicator Name: Implementation and evaluation of the funded 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. 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. 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 Gayle Daigle, Accountant Administrator, Finance and Accounting Division, Phone: 225-219-7509; FAX: 225-208-1258; Email: Gayle.Daigle@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES

Program Activity: Executive Administration

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.3

Indicator Name: Maximization of Revenues for State Student Aid Programs

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 vendor fees 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, 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 Jack Hart, Assistant Executive Director for Finance and Administration, Phone: 225-219-7506; FAX: 225-208-1258; Email: jack.hart@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES

Program Activity: Executive Administration, Agency Support Services

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.4

Indicator Name: Agency administrative costs of less than 4%

Indicator LaPAS PI Code: None

- 1 Type and Level: Efficiency/None (will be reported elsewhere in plan)
- 2 Rationale: Administrative costs are an essential part of conducting business. 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, 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 data for this indicator is financial data (expenditures) reported in the state's Integrated Statewide Information Systems (ISIS) and budget data provided in the agency's appropriation letter as adjusted by any approved budget amendments. The expenditure data is reported on a state fiscal year basis and is reviewed daily.
- 7 Calculation Methodology: This indicator is determined by a standard calculation of dividing the Administrative/Support Services Program Expenditures by the Total LOSFA Budget.
- 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 Gayle Daigle, Accountant Administrator, Finance and Accounting Division, Phone: 225-219-7509; FAX: 225-208-1258; Email: Gayle.Daigle@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES

Program Activity: Executive Administration, Agency Support Services

State Outcome Goal: Higher Ed. Non-Formula

Objective: II.1

Indicator Name: Agency administrative costs of less than 4%

Indicator LaPAS PI Code: New

- 1 Type and Level: Efficiency/Supporting
- 2 Rationale: Administrative costs are an essential part of conducting business. Objective II.1 provides a goal to limit administrative costs to less than 4% of the agency's total annual expenditures. 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.
- 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 (expenditures) reported in the state's Integrated Statewide Information Systems (ISIS) and budget data provided in the agency's appropriation letter as adjusted by any approved budget amendments. The expenditure data is reported on a state fiscal year basis and is reviewed daily.
- 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.
- 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 Gayle Daigle, Accountant Administrator, Finance and Accounting Division, Phone: 225-219-7509; FAX: 225-208-1258; Email: Gayle.Daigle@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES

Program Activity: Agency Support Services

State Outcome Goal: Higher Ed. Non-Formula

Objective: II.2

Indicator Name: Increased access to and availability of on-line college access information

Increased communication with parents and students via digital communications and social media marketing

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 customer access to agency information to facilitate college access. 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. Divisions will collaborate to enhance or increase web content, digital communication, and social media marketing...
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 Brown, Division Director, Information Services Division, Phone: 225-219-7624; FAX: 225-612-6659; Email: alice.t.brown@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES

Program Activity: Agency Support Services

State Outcome Goal: Higher Ed. Non-Formula

Objective: II.3

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 evaluations (PES) completed on time.
8. Scope: The data is aggregated by area.
9. Caveats: There are no caveats.
10. Responsible Person: Contact Stacy Oubre, Human Resources Manager, Human Resources Division, Phone: 225-219-7661; FAX: 225-208-1693; Email: Stacy.Oubre@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES

Program Activity: Agency Support Services

State Outcome Goal: Higher Ed. Non-Formula

Objective: II.4

Indicator Name: Annual Number of Exceptions requests received

Indicator LaPAS PI Code: None

1. Type and Level: Input/None
2. Rationale: It is important to track all phases of cancellations and exception processing, to ensure the timely and consistent processing of TOPS Exceptions for students requesting exceptions to the TOPS initial and continuing eligibility requirements,
3. Use: This measure is used to monitor all phases of exception processing, and identify trends that can be addressed through changes in procedures, rules or law.
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.
7. Calculation Methodology: The indicator is the simple summation of exceptions processed during the reporting period
8. Scope: The data is aggregated by type of exception.
9. Caveats: There are no caveats.
10. Responsible Person: Contact Robyn Lively, Attorney 3, Legal Division, Phone: 225-219-7652; FAX: 225-208-1618; Email: Robyn.Lively@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES

Program Activity: Agency Support Services

State Outcome Goal: Higher Ed. Non-Formula

Objective: II.4

Indicator Name: Number of Exceptions requests processed by type

Indicator LaPAS PI Code: None

1. Type and Level: Output/None
2. Rationale: It is important to track all phases of cancellations and exception processing, to ensure the timely and consistent processing of TOPS Exceptions for students requesting exceptions to the TOPS initial and continuing eligibility requirements,
3. Use: This measure is used to monitor all phases of exception processing, and identify trends that can be addressed through changes in procedures, rules or law.
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.
7. Calculation Methodology: The indicator is the simple summation of exceptions processed during the reporting period
8. Scope: The data is aggregated by type of exception.
9. Caveats: There are no caveats.
10. Responsible Person: Contact Robyn Lively, Attorney 3, Legal Division, Phone: 225-219-7652; FAX: 225-208-1618; Email: Robyn.Lively@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES

Program Activity: Agency Support Services

State Outcome Goal: Higher Ed. Non-Formula

Objective: II.4

Indicator Name: Percentage Change in Exceptions requests by type

Indicator LaPAS PI Code: None

1. Type and Level: Outcome/None
2. Rationale: It is important to track all phases of cancellations and exception processing, to ensure the timely and consistent processing of TOPS Exceptions for students requesting exceptions to the TOPS initial and continuing eligibility requirements,
3. Use: This measure is used to monitor all phases of exception processing, and identify trends that can be addressed through changes in procedures, rules or law.
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.
7. Calculation Methodology: The indicator is the simple summation of exceptions processed during the reporting period
8. Scope: The data is aggregated by type of exception.
9. Caveats: There are no caveats.
10. Responsible Person: Contact Robyn Lively, Attorney 3, Legal Division, Phone: 225-219-7652; FAX: 225-208-1618; Email: Robyn.Lively@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES

Program Activity: Audit

State Outcome Goal: Higher Ed. Non-Formula

Objective: III.1

Indicator Name: Number of audits planned to achieve compliance level

Indicator LaPAS PI Code: None

1. Type and Level: Output/None
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: 225-219-7681; FAX: 225-208-1655; Email Kelvin.deloch@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES

Program Activity: Audit

State Outcome Goal: Higher Ed. Non-Formula

Objective: III.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: 225-219-7681; FAX: 225-208-1655; Email Kelvin.deloch@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES

Program Activity: Audit

State Outcome Goal: Higher Ed. Non-Formula

Objective: III.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: 225-219-7681; FAX: 225-208-1655; Email Kelvin.deloch@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES

Program Activity: Audit

State Outcome Goal: Higher Ed. Non-Formula

Objective: III.1

Indicator Name: Number of TOPS Individual Reviews

Indicator LaPAS PI Code: New

1. Type and Level: Output/General Performance Indicator
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 TOPS individual reviews and evaluates whether the individual is eligible for a TOPS award. 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 annually.
7. Calculation Methodology: The indicator is the simple summation of individual reviews completed during the reporting period.
8. Scope: All individual reviews conducted during the state fiscal year are aggregated into one indicator. The indicator can be broken down into type of TOPS award.
9. Caveats: There are no caveats.
10. Responsible Person: Contact Kelvin Deloch, Audit Manager, Audit Division, Phone: 225-219-7681; FAX: 225-208-1655; Email: Kelvin.Deloch@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES

Program Activity: Audit

State Outcome Goal: Higher Ed. Non-Formula

Objective: III.1

Indicator Name: Number of START School Reviews

Indicator LaPAS PI Code: New

1. Type and Level: Output/General Performance Indicator
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 disbursing START funds to eligible institutions. 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 annually.
7. Calculation Methodology: The indicator is the simple summation of schools reviewed during the reporting period.
8. Scope: All school reviews conducted during the state fiscal year are aggregated into one indicator. The indicator can be broken down into types of schools reviewed.
9. Caveats: There are no caveats.
10. Responsible Person: Contact Kelvin Deloch, Audit Manager, Audit Division, Phone: 225-219-7681; FAX: 225-208-1655; Email: Kelvin.Deloch@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES

Program Activity: Audit

State Outcome Goal: Higher Ed. Non-Formula

Objective: III.1

Indicator Name: Intervention Services

Indicator LaPAS PI Code: New

1. Type and Level: Output/General Performance Indicator
2. Rationale: Auditing is an essential function to ensure program participants (internal and external) comply with applicable statutes, regulations and directives. This indicator tracks the Audit Division's intervention services performed during the year (e.g. consultations, workshops, webinars, technical support, etc.).
3. Use: This measure is used to reduce the number of audit findings and increase the compliance rate. 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 annually.
7. Calculation Methodology: The indicator is the simple summation of intervention services performed during the reporting period.
8. Scope: All services conducted during the state fiscal year are aggregated into one indicator. The indicator can be broken down into types of services performed.
9. Caveats: There are no caveats.
10. Responsible Person: Contact Kelvin Deloch, Audit Manager, Audit Division, Phone: 225-219-7681; FAX: 225-208-1655; Email: Kelvin.Deloch@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES

Program Activity: Field Outreach Services and Public Information Division

State Outcome Goal: Higher Ed. Non-Formula

Objective: IV.1

Indicator Name: Digital Communication 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 through digital communications.
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 communications by communication type by the agency.
8. Scope: The data is disaggregated according to type of communication.
9. Caveats: It is not one indicator but a series of indicators reporting the results of the agency's outreach programs.
Number of texts, social media messages, email, and email-to-text inquiries answered within 1 business day or less
Increased number of direct field interactions with students
10. Responsible Person: Contact Gus Wales, Division Director, Field Outreach Services and Public Information Division, Phone: 225-219-7576; FAX: 225-208-1496; Email: gus.wales@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES

Program Activity: Field Outreach Services and Public Information Division

State Outcome Goal: Higher Ed. Non-Formula

Objective: IV.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, school, sessions, etc. 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: It is not one indicator but a series of indicators reporting the results of the agency's outreach programs.
 - Number of targeted schools receiving outreach services.
 - Number of locations scheduled for training and/or outreach services.
 - Number of increased partnerships leading to training and/or outreach services.
 - Number of people attending training and outreach activities.
10. Responsible Person: Contact Gus Wales, Division Director, Field Outreach Services and Public Information Division, Phone: 225-219-7576; FAX: 225-208-1496; Email: gus.wales@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES

Program Activity: Field Outreach Services and Public Information Division

State Outcome Goal: Higher Ed. Non-Formula

Objective: IV.3

Indicator Name: College Entry 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 critical steps for college entry 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 critical steps for college entry.
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 critical steps for college entry.
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 college entry. It is not one indicator but a series of indicators reporting the results of the agency's outreach and advertising efforts.
Number of College applications completed by students in Intensive and Concentrated Service schools
Increase over the previous year, number of students that completed the FAFSA college application and increase the number of college acceptances by students in LOSFA's Intensive and Concentrated Service schools.
10. Responsible Person: Contact Gus Wales, Division Director, Field Outreach Services and Public Information Division, Phone: 225-219-7576; FAX: 225-208-1496; Email: gus.wales@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES

Program Activity: Field Outreach Services and Public Information Division

State Outcome Goal: Higher Ed. Non-Formula

Objective: IV.4

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.
 - Number of entities scheduled and receiving training and/or outreach activities.
 - Number of locations scheduled training and/or outreach activities
 - Increase number of partnerships, trainings and/or outreach activities leading to partnerships.
 - Number of people attending training and outreach activities.
 - Increased participation in START Saving Program by members of the targeted groups and partnerships.
10. Responsible Person: Contact Gus Wales, Division Director, Field Outreach Services and Public Information Division, Phone: 225-219-7576; FAX: 225-208-1496; Email: gus.wales@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES

Program Activity: Field Outreach Services and Public Information Division

State Outcome Goal: Higher Ed. Non-Formula

Objective: IV.5

Indicator Name: Legislative & Commission/Authority 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 legislators (both in-state and nationally) and Commission and Authority members about LOSFA activities 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 promote its activities.
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 its activities.
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 its activities. It is not one indicator but a series of indicators reporting the results of the agency's outreach and advertising efforts.
 - Number of legislator and congressional delegation emails responded to within 1 business day.
 - Number of legislators and congressional delegation members attending LOSFA events in their districts.
10. Responsible Person: Contact Gus Wales, Division Director, Field Outreach Services and Public Information Division, Phone: 225-219-7576; FAX: 225-208-1496; Email: gus.wales@la.gov.

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LOAN OPERATIONS
PERFORMANCE INDICATOR MATRIX

PROGRAM OBJECTIVE	INPUTS	OUTPUTS	OUTCOMES	EFFICIENCY
Loan Program Supervision				
I.1	Reserve fund balance Dollar value of outstanding loan guarantees Monitor Activities of Third Party Servicer	Reserve ratio – reserve fund balance/loan guarantees outstanding	Compliance with federal requirements	Regulatory compliance and management indicator of performance

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PERFORMANCE INDICATOR DOCUMENTATION

Program: LOAN OPERATIONS

Program Activity: Loan Program Supervision

State Outcome Goal: Higher Ed. Non-Formula

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 by Loans outstanding.
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 Finance and Administration, Phone: 225-219-7506; FAX: 225-208-1258; Email: jack.hart@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: LOAN OPERATIONS

Program Activity: Loan Program Supervision

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.1

Indicator Name: Reserve fund balance

Indicator LaPAS PI Code: None

1. Type and Level: Input/None
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 by monitoring the fund balance of the federal reserve fund. It is used as the numerator in calculating the reserve ratio (LAPAS PI Code 4740). The indicator is not 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.
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 Finance and Administration, Phone: 225-219-7506; FAX: 225-208-1258; Email: jack.hart@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: LOAN OPERATIONS

Program Activity: Loan Program Supervision

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.1

Indicator Name: Dollar Value of Outstanding Loan Guarantees

Indicator LaPAS PI Code: None

1. Type and Level: Output/None
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 calculate a reserve ratio. It is used as the denominator in calculating the reserve ratio (LAPAS PI Code 4740). The indicator is not 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.
7. Calculation Methodology: The loans outstanding indicator uses information from the U. S. Department of Education's Forms 2000 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 Finance and Administration, Phone: 225-219-7506; FAX: 225-208-1258; Email: jack.hart@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: LOAN OPERATIONS

Program Activity: Loan Program Supervision

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.1

Indicator Name: Monitor Activities of Third Party Servicer

Indicator LaPAS PI Code: None

1. Type and Level: Input/None
2. Rationale: Through competitive bidding, the agency has selected a third party servicer to perform guaranty services at the highest level of efficiency with the lowest cost and greatest return to the agency. The activities of the third party servicer must be monitored to ensure compliance with the contract and applicable federal regulations.
3. Use: The indicator is used for internal management purposes to monitor the third party servicers success in complying with applicable statutes, rules, guidance, directives, industry standards and ethical standards and the servicing contract.
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.
6. Data Source, Collection and Reporting: The source for this indicator is data generated by the contractor 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 is a collective indicator to document the agency's activities to implement and maintain adequate controls to monitor the third party servicer activities within the scope of the servicer contract. 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: The indicator is the agency's efforts to monitor the activities of the third party servicer.
9. Caveats: There are no caveats for this indicator.
10. Responsible Person: Contact Jack Hart, Assistant Executive Director for Finance and Administration, Phone: 225-219-7506; FAX: 225-208-1258; Email: jack.hart@la.gov.

OFFICE OF STUDENT FINANCIAL ASSISTANCE
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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES

Program Activity: Loan Program Supervision

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.1

Indicator Name: Official 3-Year Cohort Default Rate

Indicator LaPAS PI Code: New

1. Type and Level: Outcome/General Performance Indicator
2. Rationale: The Official 3-Year Cohort Default Rate reported annually by USDOE measures the health of the loan program by examining the rate at which student loans guaranteed by the agency are defaulting, thus requiring collection efforts from the borrower and payment to the lender of the loan balance due to the agency's loan guarantee.
3. Use: The indicator is used to monitor the default rate on student loans guaranteed by the agency.
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 student loans guaranteed by LOSFA that enter a default status.
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 the 3-year cohort default rates reported annually by USDOE. The cohort default rates are calculated based on data reported to the National Student Loan Data System (NSLDS) by the guaranty agencies. Cohort default rates (CDR) are calculated bi-annually. The first calculation is known as the draft, which is calculated in January and distributed in February. The official CDR calculation occurs in July with a September distribution.
7. Calculation Methodology: Under Section 430(e) of the Higher Education Act of 1965, as amended (HEA), the United States Department of Education (USDOE) is required to publish the cohort default rates of lenders, subsequent holders, guaranty agencies and Colleges and Universities participating as a lender in the FFEL Program. The official 3-year cohort default rate, for any fiscal year where 30 or more student borrowers enter repayment, is the percentage of those borrowers who enter repayment on certain FFEL Program loans during a particular fiscal year and default within the same fiscal year or within the next two fiscal years. This indicator is calculated and reported by USDOE.
8. Scope: This indicator reports the annual official 3-year cohort default rate for FFELP Student Loans guaranteed by LOSFA reported by the USDOE..
9. Caveats: There are no caveats for this indicator.
10. Responsible Person: Contact Jack Hart, Assistant Executive Director for Finance and Administration, Phone: 225-219-7506; FAX: 225-208-1258; Email: jack.hart@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES

Program Activity: Loan Program Supervision

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.1

Indicator Name: Official Default Rate Trigger Rate

Indicator LaPAS PI Code: New

1. Type and Level: Outcome/General Performance Indicator
2. Rationale: USDOE reimburses guaranty agencies for the payments they make to lenders to pay for student loans that have defaulted. The rate of reimbursement from USDOE that the agency receives is dependent on the agency's default rate trigger rate.
3. Use: This indicator reports the agency's annual official default rate trigger rate as reported by the USDOE.
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 default rate trigger rate that determines the percentage reimbursement from USDOE that the agency receives for payments the agency makes to lenders for defaulted student loans guaranteed by LOSFA.
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 the default rate trigger rates reported annually by USDOE.
7. Calculation Methodology: A guarantee agency's "trigger default rate" is the ratio between the net amount of reinsurance received by a guarantor on default claims in a given federal fiscal year and the dollar amount of loans in repayment as of the end of the prior federal fiscal year. The rate is calculated and published by USDOE for all FFELP loan program guaranty agencies.
8. Scope: This indicator reports the official trigger rate for LOSFA as reported by USDOE.
9. Caveats: There are no caveats for this indicator.
10. Responsible Person: Contact Jack Hart, Assistant Executive Director for Finance and Administration, Phone: 225-219-7506; FAX: 225-208-1258; Email: jack.hart@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES

Program Activity: Loan Program Supervision

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.1

Indicator Name: Number of Defaulted Loans Rehabilitated

Indicator LaPAS PI Code: New

1. Type and Level: Output/General Performance Indicator
2. Rationale: Guaranty agencies have an important stake in helping FFELP borrowers avoid default and, when they do default, helping them successfully rehabilitate those loans so that they can emerge from default, get their lives back on track and contribute to the economy. Loan rehabilitation is the ONLY way to remove the record of default from the credit history of a defaulted student loan borrower. A defaulted student loan is reported on a student's credit history and makes it harder for them to qualify for mortgages and other loans in the future.
3. Use: The indicator is used to monitor the servicing contractor's performance in assisting students in danger of defaulting on their student loan to return to a good standing repayment status and thus avoid the consequences of having a loan in default. 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 student loans guaranteed by LOSFA that enter a default status.
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 a report by the servicing contractor that lists the number of borrowers that are approaching default status but were successfully restored to a repayment status due to the default prevention activities performed by the contractor. This data is reported on a federal fiscal year basis.
7. Calculation Methodology: The number of defaulted loans rehabilitated indicator uses information provided by the servicing contractor that is reported annually on an aggregate basis for a federal fiscal year.
8. Scope: This indicator reports the number of borrowers that avoided default status during a federal fiscal year and returned their student loan to a good standing repayment status.
9. Caveats: There are no caveats for this indicator.
10. Responsible Person: Contact Jack Hart, Assistant Executive Director for Finance and Administration, Phone: 225-219-7506; FAX: 225-208-1258; Email: jack.hart@la.gov.

OFFICE OF STUDENT FINANCIAL ASSISTANCE
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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES

Program Activity: Loan Program Supervision

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.1

Indicator Name: Dollar Value of Defaulted Loans Rehabilitated

Indicator LaPAS PI Code: New

1. Type and Level: Outcome/General Performance Indicator
2. Rationale: Guaranty agencies have an important stake in helping FFELP borrowers avoid default and, when they do default, helping them successfully rehabilitate those loans so that they can emerge from default, get their lives back on track and contribute to the economy. Loan rehabilitation is the ONLY way to remove the record of default from the credit history of a defaulted student loan borrower. A defaulted student loan is reported on a student's credit history and makes it harder for them to qualify for mortgages and other loans in the future.
3. Use: The indicator is used to monitor the servicing contractor's performance in assisting students in danger of defaulting on their student loan to return to a good standing repayment status and thus avoid the consequences of having a loan in default. 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 success of the agency through the actions of the servicing contractor to assist students in avoiding default status for their student loans guaranteed by LOSFA.
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 USDOE monthly GA Reports that lists the federal fiscal year to date amount of rehabilitated loan collections as reported to USDOE.
7. Calculation Methodology: The dollar value of defaulted loans rehabilitated indicator uses official data provided by the USDOE for all guarantee agencies that is reported on an aggregate basis for the federal fiscal year to date.
8. Scope: This indicator reports the total dollar value collected for student loans for borrowers that avoided default status during a federal fiscal year and returned their student loan to a good standing repayment status.
9. Caveats: There are no caveats for this indicator.
10. Responsible Person: Contact Jack Hart, Assistant Executive Director for Finance and Administration, Phone: 225-219-7506; FAX: 225-208-1258; Email: jack.hart@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: ADMINISTRATION AND SUPPORT SERVICES

Program Activity: Loan Program Supervision

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.1

Indicator Name: Recovery Rate on Default Collections

Indicator LaPAS PI Code: New

1. Type and Level: Outcome/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 measures the efficiency of the servicing contractor 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. 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 effectiveness in collecting on defaulted student loans that were guaranteed by LOSFA.
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 USDOE monthly GA Reports that lists the guaranty agency recovery rates calculated by USDOE on a federal fiscal year to date basis.
7. Calculation Methodology: This indicator is calculated and reported by USDOE.
8. Scope: The indicator is a simple ratio calculated by USDOE.
9. Caveats: There are no caveats for this indicator.
10. Responsible Person: Contact Jack Hart, Assistant Executive Director for Finance and Administration, Phone: 225-219-7506; FAX: 225-208-1258; Email: jack.hart@la.gov.

OFFICE OF STUDENT FINANCIAL ASSISTANCE
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SCHOLARSHIP, GRANT AND SAVING
PERFORMANCE INDICATOR MATRIX

PROGRAM OBJECTIVE	INPUTS	OUTPUTS	OUTCOMES	EFFICIENCY
Scholarship & Grant Program Activity				
I.1	Budget for administrative costs for the State Fiscal Year	Dollar value of state scholarship and grant program awards	Minimize program costs to maximize funding available to program participants	Ratio of administrative costs to dollar value of scholarship and grant programs less than 4%
I.2	State general funds, federal funds and any other funds appropriated by program for scholarships, grants and incentives for postsecondary education	State general funds, federal funds and any other funds paid out by program for scholarships, grants and incentives for postsecondary education	Make postsecondary education affordable through financial aid programs administered by LOSFA Increase access by providing training to students and parents on postsecondary topics Increase the number of students receiving postsecondary educations through funding provided by LOSFA	Maximize the number of students receiving postsecondary education at the lowest cost to the state
START Saving Program Administration Program Activity				
II.1	Number of accounts and dollar value of principal deposits START Saving Fund Disbursements	Number of account owners and dollar value of principal deposits START Saving Fund Disbursements	Encourages family planning and saving for postsecondary educational expenses Reduces reliance on student loans Increases access to post-secondary education	Ability to attract investors and maximize their investments
II.2	Number of accounts and dollar value of principal deposits ABLE Account disbursements	Number of account owners and dollar value of principal deposits ABLE Account disbursements	Encourages family planning and savings for the financing of certain qualified expenses of persons with disabilities Promotes economic self-reliance	Ability to attract investors and maximize their investments

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING

Program Activity: Scholarship & Grant Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.1

Indicator Name: Ratio of administrative costs to dollar value of scholarship and grant programs less than 4%

Indicator LaPAS PI Code: New

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. 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.
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 and the Total Scholarship/Grant and TOPS awards and START contributions indicators.
7. Calculation Methodology: This indicator is determined by a standard calculation of dividing the Administrative costs of Scholarship, Grant and START Saving Program by the Total Scholarship/Grant and TOPS awards 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 Gayle Daigle, Accountant Administrator, Finance and Accounting Division, Phone: 225 - 219-7509; FAX: 225-208-1258; Email: Gayle.Daigle@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING

Program Activity: Scholarship & Grant Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.2

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: 225-219-7714; FAX: 225-612-6508; Email: bonnie.lavergne@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING

Program Activity: Scholarship & Grant Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.2

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: 225-219-7714; FAX: 225-612-6508; Email: bonnie.lavergne@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING

Program Activity: Scholarship & Grant Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.2

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: 225-219-7714; FAX: 225-612-6508; Email: bonnie.lavergne@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING

Program Activity: Scholarship & Grant Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.2 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: 225-219-7714; FAX: 225-612-6508; Email: bonnie.lavergne@la.gov.

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Program: SCHOLARSHIP, GRANT AND SAVING

Program Activity: Scholarship & Grant Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.2

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: 225-219-7714; FAX: 225-612-6508; Email: bonnie.lavergne@la.gov.

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Program: SCHOLARSHIP, GRANT AND SAVING

Program Activity: Scholarship & Grant Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.2

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: 225-219-7714; FAX: 225-612-6508; Email: bonnie.lavergne@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING

Program Activity: Scholarship & Grant Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.2

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: 225-219-7714; FAX: 225-612-6508; Email: bonnie.lavergne@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING

Program Activity: Scholarship & Grant Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.2

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: 225-219-7714; FAX: 225-612-6508; Email: bonnie.lavergne@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING

Program Activity: Saving Programs

State Outcome Goal: Higher Ed. Non-Formula

Objective: II.1

Indicator Name: Number of START Accounts

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 account.
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: 225-219-7705; FAX: 225-612-6497; Email: carol.fulco@la.gov.

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Program: SCHOLARSHIP, GRANT AND SAVING

Program Activity: Saving Programs

State Outcome Goal: Higher Ed. Non-Formula

Objective: II.1

Indicator Name: START 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: 225-219-7705; FAX: 225-612-6497; Email: carol.fulco@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING

Program Activity: Saving Programs

State Outcome Goal: Higher Ed. Non-Formula

Objective: II.1

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: 225-219-7705; FAX: 225-612-6497; Email: carol.fulco@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING

Program Activity: Saving Programs

State Outcome Goal: Higher Ed. Non-Formula

Objective: II.1

Indicator Name: Number of ABLE Accounts

Indicator LaPAS PI Code: New (To be tracked once ABLE Accounts are functional)

1. Type and Level: Output/None
2. Rationale: This indicator tracks the number of accounts that have been opened in the ABLE Account Saving Program (the state's IRS Section 521 savings plan).
3. Use: The indicator is used to track the growth of the ABLE Account Savings Program and evaluate the success of the agency in attracting investors to save for the allowable expenses of persons with disabilities. The indicator is reported for performance-based budgeting purposes.
4. Clarity: The ABLE Account Saving Program is a savings plan for persons with disabilities, which is a "Qualified Plan" under Section 521 of the Internal Revenue Code.
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 ABLE Account Savings Program accounts. One account with multiple owners is considered as one account.
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: 225-219-7705; FAX: 225-612-6497; Email: carol.fulco@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: SCHOLARSHIP, GRANT AND SAVING

Program Activity: Saving Programs

State Outcome Goal: Higher Ed. Non-Formula

Objective: II.1

Indicator Name: ABLE Account Principal Deposits

Indicator LaPAS PI Code: New (To be tracked once ABLE Accounts are functional)

1. Type and Level: Output/None
2. Rationale: This indicator tracks the total dollar value of the principal deposits invested in the ABLE Account Saving Program (the state's IRS Section 521 savings plan).
3. Use: The indicator is used to track the growth of the ABLE Account Savings Program and evaluate the success of the agency in attracting investors to save for allowable expenses for persons with disabilities. The indicator is reported for performance-based budgeting purposes.
4. Clarity: The ABLE Account Saving Program is a savings plan for persons with disabilities, which is a "Qualified Plan" under Section 521 of the Internal Revenue Code.
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 ABLE Account 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: 225-219-7705; FAX: 225-612-6497; Email: carol.fulco@la.gov.

OFFICE OF STUDENT FINANCIAL ASSISTANCE
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TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)
PERFORMANCE INDICATOR MATRIX

PROGRAM OBJECTIVE	INPUTS	OUTPUTS	OUTCOMES	EFFICIENCY
TOPS Program Activities				
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 1st of their application year
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
I.3	Dollar value of TOPS Tech and TOPS Tech Early Start Number of students eligible for TOPS Tech and TOPS Tech Early Start	Number of students receiving TOPS Tech and TOPS Tech Early Start funding	Increase in students receiving technical training	Maximizing the number of students receiving technical training

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Program Activity: TOPS Program

State Outcome Goal: Higher Ed. Non-Formula

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: 225-219-7842; FAX: 225-612-6508; Email: susan.bohall@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Program Activity: TOPS Program

State Outcome Goal: Higher Ed. Non-Formula

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: 225-219-7842; FAX: 225-612-6508; Email: susan.bohall@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Program Activity: TOPS Program

State Outcome Goal: Higher Ed. Non-Formula

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: 225-219-7842; FAX: 225-612-6508; Email: susan.bohall@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Program Activity: TOPS Program

State Outcome Goal: Higher Ed. Non-Formula

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: 225-219-7674; FAX: 225-612-6508; Email: john.bell@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Program Activity: TOPS Program

State Outcome Goal: Higher Ed. Non-Formula

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: 225-219-7674; FAX: 225-612-6508; Email: john.bell@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Program Activity: TOPS Program

State Outcome Goal: Higher Ed. Non-Formula

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: 225-219-7674; FAX: 225-612-6508; Email: john.bell@la.gov.

OFFICE OF STUDENT FINANCIAL ASSISTANCE
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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Program Activity: TOPS Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.3

Indicator Name: Number of students receiving TOPS Tech and TOPS Tech Early Start funding

Indicator LaPAS PI Code: New

1. Type and Level: Input/Supporting
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, specifically the TOPS Tech and TOPS Tech Early Start programs.
3. Use: This measure is used to monitor the number of students receiving the TOPS Tech and TOPS Tech Early Start 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 annually 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 for a TOPS Tech or TOPS Tech Early Start 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: Dr. John Bell, Renewal Section Supervisor, Scholarship and Grant Division, Phone: 225-219-7674; FAX: 225-612-6508; Email: john.bell@la.gov.

OFFICE OF STUDENT FINANCIAL ASSISTANCE
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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Program Activity: TOPS Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.1

Indicator Name: Total amount awarded

Indicator LaPAS PI Code: New

1. Type and Level: Output/General Performance Indicator
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 annually on a state fiscal year basis and is reviewed daily.
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 Dr. John Bell, Renewal Section Supervisor, Scholarship and Grant Division, Phone: 225-219-7674; FAX: 225-612-6508; Email: john.bell@la.gov.

OFFICE OF STUDENT FINANCIAL ASSISTANCE
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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Program Activity: TOPS Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.1

Indicator Name: Total number of award recipients

Indicator LaPAS PI Code: New

1. Type and Level: Input/General Performance Indicator
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 annually 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: Dr. John Bell, Renewal Section Supervisor, Scholarship and Grant Division, Phone: 225-219-7674; FAX: 225-612-6508; Email: john.bell@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Program Activity: TOPS Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.1

Indicator Name: Number of graduates eligible for TOPS

Indicator LaPAS PI Code: New

1. Type and Level: Output/General Performance Indicator
2. Rationale: The number 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 to enable the agency to make a TOPS eligibility determination.
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 reports the number of students determined eligible for a TOPS award 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: None.
10. Responsible Person: Contact Richard Omdal, Policy/Planning Officer, Policy Section, Phone: 225-219-7508; FAX: 225-208-1258; Email: Richard.omdal@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Program Activity: TOPS Program

State Outcome Goal: Higher Ed. Non-Formula

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: 225-219-7508; FAX: 225-208-1258; Email: Richard.omdal@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Program Activity: TOPS Program

State Outcome Goal: Higher Ed. Non-Formula

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: 225-219-7508; FAX: 225-208-1258; Email: Richard.omdal@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Program Activity: TOPS Program

State Outcome Goal: Higher Ed. Non-Formula

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: 225-219-7508; FAX: 225-208-1258; Email: Richard.omdal@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Program Activity: TOPS Program

State Outcome Goal: Higher Ed. Non-Formula

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: 225-219-7508; FAX: 225-208-1258; Email: Richard.omdal@la.gov.

OFFICE OF STUDENT FINANCIAL ASSISTANCE
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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Program Activity: TOPS Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.3

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: 225-219-7508; FAX: 225-208-1258; Email: Richard.omdal@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Program Activity: TOPS Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.3

Indicator Name: Average Amount Awarded: TOPS-Tech Early Start

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 Early Start 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). In addition, 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 while still in 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 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 Early Start Award.
9. Caveats: There are no caveats for this indicator.
10. Responsible Person: Contact Richard Omdal, Policy/Planning Officer, Policy Section, Phone: 225-219-7508; FAX: 225-208-1258; Email: Richard.omdal@la.gov.

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Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Program Activity: TOPS Program

State Outcome Goal: Higher Ed. Non-Formula

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: 225-219-7714; FAX: 225-612-6508; Email: bonnie.lavergne@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Program Activity: TOPS Program

State Outcome Goal: Higher Ed. Non-Formula

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: 225-219-7714; FAX: 225-612-6508; Email: bonnie.lavergne@la.gov.

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PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Program Activity: TOPS Program

State Outcome Goal: Higher Ed. Non-Formula

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: 225-219-7714; FAX: 225-612-6508; Email: bonnie.lavergne@la.gov.

OFFICE OF STUDENT FINANCIAL ASSISTANCE
Strategic Plan 2016-2017 Through 2020-2021

PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Program Activity: TOPS Program

State Outcome Goal: Higher Ed. Non-Formula

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: 225-219-7714; FAX: 225-612-6508; Email: bonnie.lavergne@la.gov.

OFFICE OF STUDENT FINANCIAL ASSISTANCE
Strategic Plan 2016-2017 Through 2020-2021

PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Program Activity: TOPS Program

State Outcome Goal: Higher Ed. Non-Formula

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: 225-219-7714; FAX: 225-612-6508; Email: bonnie.lavergne@la.gov.

OFFICE OF STUDENT FINANCIAL ASSISTANCE
Strategic Plan 2016-2017 Through 2020-2021

PERFORMANCE INDICATOR DOCUMENTATION

Program: TAYLOR OPPORTUNITY PROGRAM FOR STUDENTS (TOPS)

Program Activity: TOPS Program

State Outcome Goal: Higher Ed. Non-Formula

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: 225-219-7714; FAX: 225-612-6508; Email: bonnie.lavergne@la.gov.

APPENDIX G

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.

APPENDIX H

STRATEGIC LINKS

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 and the Early Start Program are part of the Children's Budget.