

ADDENDUM
LOUISIANA BOARD OF REGENTS
STRATEGIC PLAN
FY 2019-2020 THROUGH FY 2024-2025
AGENCY NUMBER: 671

**LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE (LOSFA)
A PROGRAM OF THE BOARD OF REGENTS**

VISION: **Be the first choice for college access.**

MISSION: To promote, prepare for and provide equity of college access.

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

VALUES:
Teamwork
Excellence
Service
Transparency

GOALS:

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

PROGRAM ACTIVITY I: LOSFA Management/Administration/Support Services Activity

Implement and maintain controls sufficient to ensure compliance with applicable statutes, rules, guidance, directives, industry standards and ethical standards and control program costs. Provide support services for all LOSFA programs and support services for assigned Board of Regents programs/activities.

This activity is performed by:

- (1) **LOSFA Executive Management** - This activity is performed by the senior management of LOSFA, which includes the Executive Director and Executive staff. This activity provides the overall supervision of LOSFA employees and its programs. This activity executes and enforces all decisions, orders, rules and regulations of the Louisiana Board of Regents (BOR) and the Louisiana Tuition Trust Authority (LATA) concerning LOSFA programs and assigned activities.
- (2) **Fiscal and Administrative Services Division** - Provide payroll, accounts receivable and payable, mail services, purchasing and receiving, property control, federal and state reporting, budget control and financial management. Fiscal also supervises the FFEL program functions carried out by a third party servicer under a contract with LOSFA. 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. LOSFA 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. Note: Congress terminated the FFEL program, with no new student loans being originated after June 2010.
- (3) **Information Technology (IT) Division** - Provide technical support and interfaces for LOSFA divisions and clients and provides information to the public through the LOSFA website.
- (4) **Human Resources Division** - recruits, maintains and supports a diverse, qualified and well-trained workforce for Board of Regents and their divisions/programs in compliance with state and federal laws.
- (5) **LOSFA Legal Division** - Provides, manages, and coordinates for LOSFA programs all legal services and minimizes legal risks and costs efficiently, reliably and professionally.
- (6) **Audit Division** - Ensures that LOSFA and student financial aid program participants are in compliance with applicable laws and regulations by performing audits and reviews and providing technical assistance. The Audit Division conducts reviews of its third party servicer in connection with LOSFA'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 LOSFA. The Audit Division also performs reviews for individual TOPS eligibility and cohort default rate challenges.

- (7) **Research and Planning** - Analyzes policy impacts, conducts research, tracks rulemaking process, monitors legislation and provides cost information.

PROGRAM ACTIVITY OBJECTIVE I.1

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

- STRATEGY I.1.1 Ensure employees attend and participate in related industry/trade organizations.
- STRATEGY I.1.2 Ensure employees attend professional training sessions and continuing education programs.
- STRATEGY I.1.3 Prepare financials for the START Saving Program.
- STRATEGY I.1.4 Prepare financials for the FFELP.
- STRATEGY I.1.5 Prepare year-end financials for LOSFA.
- STRATEGY I.1.6 Update program rules to implement legislative changes and new programs.
- STRATEGY I.1.7 Ensure employees receive ethics training and subsequent refresher training.
- STRATEGY I.1.8 Create, publish, update and enforce Board of Regent and LOSFA policies and procedures for the security and safeguarding of Personally Identifiable Information (PII), START Account Financial Information, and other student data.
- STRATEGY I.1.9 Ensure employees receive periodic training on the proper handling of PII and other sensitive personal data.

PERFORMANCE INDICATORS

- Input: LOSFA budget allocation.
Periodic Employee Training.
- Output: Program Rules.
START Disclosure Statement and Supplements.
Federal Financial Reports.
Compliance with requirements found in applicable laws, statutes, policies and procedures.
- Outcome: Increased compliance with applicable statutes, rules, guidance, directives, industry standards and ethical standards.
- Quality: Number of Audit Findings minimized or eliminated.

PROGRAM ACTIVITY OBJECTIVE I.2:

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

- STRATEGY I.2.1 Monitor administrative costs as related to budgeted costs on a monthly

- basis.
- STRATEGY I.2.2 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 I.2.3 Recommend and implement cost efficiency measures as appropriate.

PERFORMANCE INDICATORS

- Input: LOSFA administrative costs.
- Output: LOSFA administrative costs of less than 4%.
- Outcome: Minimize administrative costs and maximize funds available for programs benefiting students.
- Efficiency: Ratio of LOSFA total annual expenditures to LOSFA administrative costs.

PROGRAM ACTIVITY OBJECTIVE I.3

Utilize technology to support LOSFA’s initiatives and to disseminate pertinent information to end users.

- STRATEGY I.3.1 Implement and evaluate information technology security precautions annually.
- STRATEGY I.3.2 Collaborate with divisions to enhance or increase web content, digital communication, and social media marketing.
- STRATEGY I.3.3 Provide comprehensive on-line access to parents and students for the purposes of tracking eligibility for and maintaining eligibility of program awards.
- STRATEGY I.3.4 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 I.3.5 Maximize multiple means of communication to disseminate information effectively for the purpose of direct provision of information to students and families.
- STRATEGY I.3.6 Facilitate reporting across programs to provide comprehensive data on multiple funding sources utilized by the students served.
- STRATEGY I.3.7 Support performance reporting by maintaining clearly defined data dictionary in support of business intelligence (BI) initiatives.
- STRATEGY I.3.8 Continue to work with Office of Technology Services (OTS) to maintain and support the network infrastructure and software to support LOSFA’s functions.
- STRATEGY I.3.9 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.

- 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 Board of Regent’s staff.
Increased capacity to produce program performance data for dissemination to stakeholders.

PROGRAM ACTIVITY OBJECTIVE I.4

To recruit, maintain and support a qualified, well-trained and productive workforce.

- STRATEGY I.4.1 Partner with Civil Service to ensure that position titles allocated fit the mission of Board of Regents, LOSFA and LUMCON and provide appropriate incentives to retain qualified, well-trained, productive employees.
- STRATEGY I.4.2 Promote employment at LOSFA, LUMCON and BOR 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 I.4.3 Develop partnerships with postsecondary institutions to facilitate student internships, graduate assistantships and community service opportunities for special projects across the Board of Regent’s programs.
- STRATEGY I.4.4 Continue to use technology resources to streamline Human Resources processes i.e. creating an “Employment Opportunity” link on the LOSFA Internet Home Page and using the state’s on-line Time and Attendance system.
- STRATEGY I.4.5 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 I.4.6 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 I.4.7 Develop and implement low-cost initiatives that encourage and recognize outstanding employee performance and improve employee morale.
- STRATEGY I.4.8 Ensure supervisors complete mandatory Comprehensive Public Training Program requirements and any continuing education requirements within the appropriate time-frame.

- STRATEGY I.4.9 Make certain employees have access to employee assistance programs, training opportunities, benefits information and job related educational opportunities.
- STRATEGY I.4.10 Conduct 100% of annual employee performance evaluations (PES) timely.
- STRATEGY I.4.11 Review and update BOR 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 I.5

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 I.5.1 Analyze federal and state legislation to determine and inform executive staff of the potential impact on LOSFA-administered programs.
- STRATEGY I.5.2 Update program rules and administrative procedures to implement legislative changes and new programs.
- STRATEGY I.5.3 Review LOSFA publications prior to dissemination to ensure that they are current and accurate.
- STRATEGY I.5.4 Review and provide updates to appropriate division personnel on internal BOR/LOSFA policies and procedures to ensure compliance with state and federal law and regulations.
- STRATEGY I.5.5 Negotiate and draft all LOSFA consulting services contracts to ensure LOSFA’s needs will be met and to ensure compliance with Office of State Procurement requirements.
- STRATEGY I.5.6 Track all phases of cancellations and exception processing, and identify trends that can be addressed through changes in procedures, rules or law.
- STRATEGY I.5.7 Maintain historical data to ensure consistency in exception processing.
- STRATEGY I.5.8 Utilize digital communications to communicate more effectively.
- STRATEGY I.5.9 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 Exception requests received.
Output: Number of Exception requests processed by type.
Outcome: Percentage change in Exception requests by type.

PROGRAM ACTIVITY OBJECTIVE I.6:

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

STRATEGY I.6.1 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 LOSFA.

PERFORMANCE INDICATORS

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

PROGRAM ACTIVITY OBJECTIVE I.7

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

STRATEGY I.7.1 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 LOSFA.
STRATEGY I.7.2 Plan and perform audits to achieve at least a 95% confidence level in each audit.
STRATEGY I.7.3 Work with the Scholarship and Grants Division to derive an action plan using historical data along with projected industry trends, to establish tactical focal points to combat compliance findings or program weaknesses.
STRATEGY I.7.4 Focus on high schools that have never been audited.
STRATEGY I.7.5 Focus on high schools with low TOPS eligibility rates.
STRATEGY I.7.6 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 II: Field Outreach Services Division and Public Information and Communications Division

This LOSFA activity is critical to LOSFA's primary mission of promoting, preparing, and providing equity of 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 Field Outreach Services Division and the Public Information and Communications Division that disseminates college financing information through various media to the public, including to educational institutions, legislators, stakeholders, and students and parents who participate in LOSFA administered programs. This activity also 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. The Field Outreach Services Division and the Public Information and Communications Division responds to incoming communications (including phone calls and email/text/social media 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, feature articles, press clippings, 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:

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

- STRATEGY II.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 satisfactory answer rate for call volume, and a one to two business day response rate to all other constituent-initiated communications.
- STRATEGY II.1.2 Achieve and maintain adequate staffing.
- STRATEGY II.1.3 Collaborate with Information Technology Division in developing online resources to provide information on LOSFA programs to students, parents, and schools.
- STRATEGY II.1.4 Utilize social media marketing to promote and publicize LOSFA outreach events, programs and initiatives.
- STRATEGY II.1.5 Increase internal and external professional development of staff to enhance 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 texts, 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:** Decreased the number of incoming communications answered via phone and email
Increased the response rate to constituents via email, text and/or social media messaging.
Increased student interaction with LOSFA Student Hub.
Increased awareness of LOSFA as a resource for all college access and financial assistance questions.
Increase the response rate for texts received from students with additional questions.
Decrease the number of schools experiencing a significant amount of TOPS processing errors.
- 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 II.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 targeted groups specified annually.

- STRATEGY II.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 II.2.2** Develop and implement the plan for marketing the LOSFA websites and use social media and email campaigns to promote college access to students, families, counselors, college access organization and other

	stakeholders, including state agencies that provide related services, such as the Louisiana Workforce Commission.
STRATEGY II.2.3	Request funding to produce and distribute postsecondary financial aid, TOPS, and Louisiana’s 529 Savings Programs (e.g. START, START K12, LA ABLE) information to selected target groups.
STRATEGY II.2.4	Continue annual Professional School Counselor Workshops to highlight College Access services.
STRATEGY II.2.5	Continue Trailblazer Leadership Program.
STRATEGY II.2.6	Continue to publish electronic newsletters.
STRATEGY II.2.7	Continue to provide training on all LOSFA programs to schools, postsecondary institutions and other interested parties in conjunction with the Louisiana Association of Student Financial Aid Administrators’ Conferences (LASFAA) and other industry meetings.
STRATEGY II.2.8	Continue to supply content to update LOSFA websites.
STRATEGY II.2.9	Continue to support maintenance of the Student Transcript System to include 9–12th grade transcript reporting, in partnership with the Board of Regents and the Louisiana Department of Education.
STRATEGY II.2.10	Strategically plan to provide annual Taylor Opportunity Program for Students (TOPS) Seminars for home-school communities.
STRATEGY II.2.11	Increase the number and frequency of TOPS Retention Seminars at postsecondary institutions.
STRATEGY II.2.12	Decrease the number of TOPS processing errors and/or reporting issues entered by students and/or counselors.
STRATEGY II.2.13	Provide helpful tips on award retention requirements via text messaging.
STRATEGY II.2.14	Work one-on-one with students submitting follow up questions via text messaging.
STRATEGY II.2.15	Host FAFSA Completion activities annually.
STRATEGY II.2.16	Provide financial literacy information to targeted groups through LOSFA’s Financial Literacy for You (FLY) program and financial literacy workshops.
STRATEGY II.2.17	Partner with the Louisiana Educational Television Authority (LETA) and other entities to produce and broadcast financial aid and college saving informational programs.

PERFORMANCE INDICATORS

Input:	Number of identified target groups. Number of identified partnership locations. Number of 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 targeted groups. Number of schools experiencing a significant amount of TOPS processing errors.

- Outcome: Increased awareness and availability of and eligibility for financial aid and TOPS programs within the target groups.
 Increased the number of completed FAFSA applications by students in statewide, intensive and concentrated service schools.
 Increased services provided to targeted schools over the previous year.
 Decreased in the frequencies of TOPS processing errors caused by students and/or counselors.
- Efficiency: Percentage of targeted groups receiving awareness information on financial aid and TOPS requirements.
 Percentage of locations receiving FAFSA assistance

PROGRAM ACTIVITY OBJECTIVE II.3:

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

- STRATEGY II.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 events and activities.
- STRATEGY II.3.2 Annually collaborate with Intensive and Concentrated Service schools to host the Louisiana College Access and Application Month (LCAAM), the Little Initiative of Louisiana College Application and Access Month (Lil’CAAM) and assist seniors in completing their college application(s).
- STRATEGY II.3.3 Coordinate with Intensive and Concentrated Service schools to attend college visits at postsecondary institutions.
- STRATEGY II.3.4 Develop and implement outreach programs for socio-economically disadvantaged and underrepresented individuals in programs administered by LOSFA that involve the faith-based community.
- STRATEGY II.3.5 Increase the awareness of LOSFA’s 5-Point match concept.
- STRATEGY II.3.6 Provide sample students with pre- and post-college access surveys to determine if students’ postsecondary attendance attitude changed.
- STRATEGY II.3.7 Partner with postsecondary institutions for hosting campus field trips.

PERFORMANCE INDICATORS

- Input: Number size, scope, and content of Louisiana College Access and 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 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 Louisiana College Access and 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.

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 Access and 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 II.4

To provide program information to target individuals and groups interested in saving plans offered by LOSFA.

- STRATEGY II.4.1 Annually reevaluate current target groups and plan for expansion of target groups to be selected.
- STRATEGY II.4.2 Produce and distribute materials appropriate to the audience that includes changes to the Student Tuition Assistance and Revenue Trust (START) Saving Program, LA ABLE Saving Program, and START K-12 Saving Program.
- STRATEGY II.4.3 Continue to publish a quarterly electronic newsletter.
- STRATEGY II.4.4 Continue to supply content to update the LOSFA web site.
- STRATEGY II.4.5 Continue annual LOSFA Saving Program Seminars.
- STRATEGY II.4.6 Develop and implement outreach programs for socio-economically disadvantaged and underrepresented individuals on the benefits of saving programs offered by LOSFA that involve the faith-based community in the distribution efforts.
- STRATEGY II.4.7 Continue to administer Rewards for Success program funds to encourage low-income families to use the START Saving Program to save for college.
- STRATEGY II.4.8 Deliver LOSFA saving program electronic publications for prompt dissemination.
- STRATEGY II.4.9 Secure state general funds to provide personnel, publications, advertising and information to market the START Saving Program, LA ABLE Saving Program, and START K-12 Saving Program.
- STRATEGY II.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.
Number of people attending training and outreach activities.
- 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.
Number of locations scheduled training and/or outreach activities.
Increase number of partnerships, trainings and/or outreach activities leading to partnerships.
Evidence that sufficient amounts of program information material was provided to reach targeted groups.
- Outcome:** Increased participation in LOSFA saving programs by members of the targeted groups and partnerships.
- Efficiency:** Percentage of targeted groups and partnerships receiving information on LOSFA saving programs.

PROGRAM ACTIVITY OBJECTIVE II.5

To keep Legislators, Congressional delegation members and Board of Regents/LATTA members updated on LOSFA events, initiatives and accomplishments.

- STRATEGY II.5.1 Weekly Email Legislative offices with details of upcoming LOSFA events at schools in their District.
- STRATEGY II.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 BOR/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.

PROGRAM ACTIVITY III: Scholarship & Grant Program

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 Board of Regents (BOR) 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 and Renewal Section and Special Programs Section. The Initial Eligibility and Renewal Section screens high school student records to determine their initial eligibility for a TOPS award, 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, BESE Tuition Program for Teachers, Louisiana Grant Opportunity for Youth ChalleNGe Skills Training Program (Go-Youth ChalleNGe), Rockefeller Wildlife Scholarship, Chafee ETV, Strategies to Empower People (STEP), John R. Justice, Regional Contract Program (RCP), and Paul Douglas) and other aid programs as assigned.

This activity also includes awards to students who qualify for the state's Taylor Opportunity Program for Students (TOPS) merit based scholarship program. This activity includes expenditures for the following awards: 1) TOPS Honors Award; 2) TOPS Performance Award; 3) TOPS Opportunity Award; 4) TOPS Tech Award; 5) TOPS-Tech Early Start Award; and 6) Louisiana National Guard member education benefits.

PROGRAM ACTIVITY OBJECTIVE III.1

To achieve the lowest possible ratio of administrative expenses to dollars awarded as scholarship and grants, not to exceed 4% per annum.

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

PROGRAM ACTIVITY OBJECTIVE III.2

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

- STRATEGY III.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 III.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 III.2.3 Closely monitor available appropriated funds.
- STRATEGY III.2.4 Develop and implement procedures to retrieve unused funds for redistribution and disbursement.
- STRATEGY III.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 III.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 III.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 OBJECTIVE III.3

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

- STRATEGY III.3.1 Continue to update internal processing systems to stay current with statute, rule and policy and to enhance operational efficiency.
- STRATEGY III.3.2 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 III.3.3 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 III.3.4 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 III.3.5 Continue to enhance programming previously developed as a means of detecting academic and application errors from outside sources.
- STRATEGY III.3.6 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 III.4

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 III.4.1 Encourage postsecondary institutions to use Electronic Funds Transfer as a means to expedite the payment process.
- STRATEGY III.4.2 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 III.4.3 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 III.5

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 III.5.1 Increase awareness of schools, students and parents of TOPS Tech and TOPS Tech Early Start eligible fields of study.
- STRATEGY III.5.2 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 III.5.3 Facilitate training of field outreach staff on opportunities related to TOPS Tech and TOPS Tech Early Start.
- STRATEGY III.5.4 Educate schools, students and parents about the alignment of the TOPS Tech and Jump Start TOPS Tech Pathway.
- STRATEGY III.5.5 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.

PROGRAM ACTIVITY IV: Saving Programs

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, the Achieving a Better Life Experience (LA ABLE) Saving Program, and the START K-12 Program. These programs are assigned to the Louisiana Tuition Trust Authority (LATTA) and the Louisiana Office of Student Financial Assistance (LOSFA). This activity primarily involves LOSFA's START Division that performs essential customer service duties to service and maintain START, LA ABLE and START K-12 accounts. This activity does not include any of the money invested by account owners.

The Student Tuition Assistance and Revenue Trust Program, commonly referred to as the START Saving Program, is an innovative college saving plan designed to help families contend with the growing costs of educating their children after high school. The START Saving Program is a Qualified Tuition Plan under Section 529 of the Internal Revenue Code that maximizes the opportunities for an increased number of students to pursue their postsecondary educational goals and helps families contend with the growing costs of a college education.

The Louisiana Achieving a Better Life Experience (LA ABLE Saving) Program is a program which allows families to save for disability related expenses of their loved ones. The advantage of this program

is that it allows the family to save without worrying about whether the assets in an account will be counted as an asset for purposes of determining eligibility for federal and state benefits programs such as Medicaid and Social Security. The LA ABLÉ Saving Program is assigned to the Louisiana Tuition Trust Authority (LATA) and the Louisiana Office of Student Financial Assistance (LOSFA) with an LA ABLÉ Account Advisory Council which advises and consults with LATA relative to the authority's administration of and adoption of rules pertaining to the LA ABLÉ program in accordance with R. S. 17:3089.

The START K-12 saving plan allows families to save for tuition expenses related to attendance at any Louisiana school that provides kindergarten through twelfth grade instruction. START K-12 is a Qualified Tuition Plan under Section 529 of the Internal Revenue Code.

This activity also includes the funding for the payment of Earnings Enhancements. Under the state's START Saving Program, a saving account for college, called an Education Saving 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.

PROGRAM ACTIVITY OBJECTIVE IV.1

To achieve or exceed the projected Student Tuition Assistance and Revenue Trust (START) Saving Program participation of 85,000 active accounts and principal deposits of \$1,500,000,000 by the end of the 2024/2025 State Fiscal Year.

- STRATEGY IV.1.1 In cooperation with the Field Outreach Services Division and the Public Information and Communications Division, expand the marketing plan to advertise START as a college access tool.
- STRATEGY IV.1.2 Update and distribute START pamphlets, applications, disclosure documents and financials, as required.
- STRATEGY IV.1.3 Coordinate with and assist the Field Outreach Services Division and the Public Information and Communications Division to increase outreach activities.
- STRATEGY IV.1.4 Continue improvement of the START Web Site to enhance interactive usage by START account owners/beneficiaries.
- STRATEGY IV.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 IV.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: Number of accounts and dollar value of principal deposits.

- Output: START Saving fund disbursements.
- 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 IV.2

To increase participation and deposits in the Louisiana Achieving a Better Life Experience (LA ABLE) Saving Program.

- STRATEGY IV.2.1 In cooperation with the Field Outreach Services Division and the Public Information and Communications Division, expand the marketing plan to advertise LA ABLE as a disability related expense saving tool.
- STRATEGY IV.2.2 Update and distribute LA ABLE pamphlets, applications, disclosure documents and financials, as required.
- STRATEGY IV.2.3 Coordinate with and assist the Field Outreach Services Division and the Public Information and Communications Division to increase outreach activities.
- STRATEGY IV.2.4 Continue improvement of the LA ABLE Web Site to enhance interactive usage by LA ABLE account owners/beneficiaries.
- STRATEGY IV.2.5 Review other ABLE plans to find practices, procedures and perks that will increase customer interest in and satisfaction with the LA ABLE Saving Program and seek amendments to the program's regulations and statute to implement these enhancements.

PERFORMANCE INDICATORS

- Input: Number of LA ABLE accounts and dollar value of principal deposits.
- Output: LA 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.

PROGRAM ACTIVITY OBJECTIVE IV.3

To increase participation and deposits in the START K-12 Saving Program.

- STRATEGY IV.2.1 In cooperation with the Field Outreach Services Division and the Public Information and Communications Division, expand the marketing plan to advertise START K-12 as a saving program for K-12 educational expenses.
- STRATEGY IV.2.2 Update and distribute START K-12 pamphlets, applications, disclosure documents and financials, as required.

- STRATEGY IV.2.3 Coordinate with and assist the Field Outreach Services Division and the Public Information and Communication Division to increase outreach activities.
- STRATEGY IV.2.4 Continue improvement of the START K-12 Web Site to enhance interactive usage by START K-12 account owners/beneficiaries.
- STRATEGY IV.2.5 Review other federal K-12 plans to find practices, procedures and perks that will increase customer interest in and satisfaction with the START K-12 Saving Program and seek amendments to the program's regulations and statute to implement these enhancements.

PERFORMANCE INDICATORS

- Input: Number of START K-12 accounts and dollar value of principal deposits.
- Output: START K-12 Account disbursements.
- Outcome: Encourages family planning and saving for the financing of certain qualified K-12 educational expenses.
- Efficiency: Ability to attract investors and maximize their investments.

APPENDICES

APPENDIX A - SERVICES AND CLIENTS

APPENDIX B - EXTERNAL AND INTERNAL FACTORS

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APPENDIX A

SERVICES AND CLIENTS

A. LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

The Louisiana Office of Student Financial Assistance (LOSFA) is a Program of the Louisiana Board of Regents with four program activities with a primary mission to, starting with Middle School, 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. The four program activities include administration, support and service of state scholarship and grant programs assigned to LOSFA and the state's Internal Revenue Code Section 529 college saving program. LOSFA is also extremely active in the dissemination of college access information within the state with a concentration on assisting students from low income families and first generation college attendees in locating and obtaining the resources necessary to pursue and complete a postsecondary education. To these ends, LOSFA regularly partners with other entities including the Louisiana Board of Regents, the Louisiana Department of Education, the Louisiana Department of the Treasury, the Gear Up and Trio programs, the Louisiana Association of Student Financial Aid Administrators, LA ABLE Account Advisory Council, Louisiana Tuition Trust Authority, LOSFA Advisory Board and others.

The **LOSFA Management/Administration/Support Services Activity** includes the following:

- a. LOSFA Executive Management
- b. Fiscal and Administrative Services Division
- c. Information Technology (IT) Division
- d. Human Resources Division
- e. LOSFA Legal Division
- f. Audit Division
- g. Research/Planning

LOSFA Executive Management is the senior management of LOSFA, which includes the Executive Director and Executive staff. They provide the overall supervision of LOSFA employees and its programs and execute and enforce all decisions, orders, rules and regulations of the Louisiana Board of Regents (BOR) and the Louisiana Tuition Trust Authority (LATTA) concerning LOSFA programs and assigned activities.

The **Fiscal and Administrative Services Division** provides accounting, budgeting, purchasing, records management and mailroom services for LOSFA and other assigned duties for Board of Regents. Beginning July 1, 2012, LOSFA outsourced the performance of its Loan Operations activities to a third party servicer under the administrative oversight of this Division. The Loan Operations activities include administration of 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. 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.

The **Information Technology (IT) Division** provides technical support for all LOSFA 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 Board of Regents, LOSFA and LUMCON 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 BOR/LOSFA/LUMCON compliance with state and federal human resources laws and regulations.

The **LOSFA Legal Division** provides legal support for all LOSFA divisions and LOSFA assigned programs and to the Louisiana Board of Regents, LOSFA Advisory Board and the Louisiana Tuition Trust Authority. The Division represents LOSFA in legal proceedings and provides records management.

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

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 LOSFA.

The **Field Outreach Services Division 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 path to postsecondary education and maintain federal and state aid during their postsecondary education.

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 LOSFA. 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.

- 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. 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).
- h. Board of Elementary and Secondary Education (BESE) Tuition Program for Teachers – allows teachers to enroll in courses at Louisiana colleges and universities at the state's expense. Teachers selected into the program will have their course tuition paid by the Louisiana Department of Education (LDOE) thru the Louisiana Office of State Financial Assistance.
- i. Regional Contract Program (RCP) - program that allows Louisiana students opportunities to study Osteopathic Medicine, Podiatry, and Optometry at select out-of-state institutions. Louisiana Post-Secondary institutions have no professional health degree programs in these fields. The Southern Regional Education Board (SREB) Regional Contract Program (RCP) enables residents of our state to study in these fields at discounted tuition rates.

Unfunded Programs:

- j. 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, LOSFA must assure that former recipients complete their obligation by teaching or repayment.
- k. 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 LOSFA must assure that former recipients complete their obligation by teaching or repayment.
- l. 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.
- m. 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.
- n. Guarantee of Nursing School Loans – provides dischargeable loans for certain nursing students.
- o. 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.
- 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 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 saving 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 saving 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 (LA ABLE) Account Program – a tax sheltered saving 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.
- c. START K-12 – a qualified tuition plan under Section 529 of the Internal Revenue Code that allows families to save for tuition expenses related to attendance at any Louisiana school that provides kindergarten through twelfth grade instruction.

APPENDIX B

EXTERNAL FACTORS

- The programs administered by LOSFA 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 LOSFA additional resources to administer them.
- Tuition and fees 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 LOSFA's automated scholarship award process.
- Natural disasters can adversely affect LOSFA, its appropriations or self-generated revenues to the extent that LOSFA'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 LOSFA 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 LOSFA'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 LOSFA's executive staff is necessary to assure that the perspectives of major populations within the state are represented.
- Lack of authority and funding for LOSFA's staffing requirements has placed excessive burdens on key staff members and threatens the quality of services provided to students.
- LOSFA will need additional state support as revenues from its administration of the Federal Family Education Loan Program (FFELP) continue to decline as outstanding loans under the program are repaid.

APPENDIX C

STATUTORY AUTHORITY

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

Federal Statutes

- a. 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.
- b. 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, LOSFA must assure that former recipients complete their obligation by teaching or repayment.
- c. 42 U.S.C. 677 *et seq.* and memorandum of understanding by and between the Louisiana Department of Children and Family Services (DCFS) and the Board of Regents – provides for the administration of the federal Chafee Education Training Voucher Program in conjunction with DCFS.
- d. Bureau of Justice Assistance Grant No. 2011-RJ-BX-0051 – funds the John R. Justice Loan Repayment Program.

Louisiana State Statutes

General

- e. LSA-R.S. 36:651BB – abolished the Louisiana Student Financial Assistance Commission (LASFAC) (R.S. 17:3021 *et seq.*) and transferred its powers, duties, functions, and responsibilities to the Board of Regents. All reference in law to the Louisiana Student Financial Assistance Commission shall refer to the Board of Regents.
- f. LSA-R.S. 36:642.D (2) – the Louisiana Student Financial Assistance Commission [replaced by the Board of Regents in R.S. 36:651BB] is responsible for the supervision, control, direction and administration of state programs on higher education financial assistance.
- g. 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.
- h. LSA-R.S. 17:3021 *et seq.* – establishes the Board of Regents 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.
- i. LSA-R.S. 17:3023.4 – authorizes the Board of Regents to guarantee loans to students under the Federal Family Education Loan Program.
- j. LSA-R.S. 17:3081 *et seq.* – establishes the ABLE Account Program for Disability-Related Expenses to be administered by the Louisiana Tuition Trust Authority in consultation with the ABLE Account Advisory Council.
- k. 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.
- l. LSA-R.S. 17:3093 – creates the Louisiana Tuition Trust Authority.

- m. LSA-R.S. 17:3100.1 *et seq.* – establishes the Louisiana Student Tuition Assistance and Revenue Trust Kindergarten through Grade Twelve Program (K-12 START) Saving Program, to be administered by the Louisiana Tuition Trust Authority.
- n. LSA-R.S. 17:3129.7 – The Board of Regents shall develop and maintain a comprehensive state student financial aid plan that supports the Master Plan for Public Postsecondary Education.
- o. LSA-R.S. 40:1207.1 *et seq.* – establishes the Medical and Allied Health Professional Education Scholarship and Loan Program under the Board of Regents. Under this program, the Regional Contract Program (RCP) is a program that allows Louisiana students opportunities to study Osteopathic Medicine, Podiatry, and Optometry at select out-of-state institutions.

Funded Scholarship and Grant Programs

- p. LSA-R.S. 17:3046 *et seq.* – establishes the Louisiana GO Grant program to be administered by the Louisiana Student Financial Assistance Commission [replaced by the Board of Regents in R.S. 36:651BB].
- q. 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 [replaced by the Board of Regents in R.S. 36:651BB].
- r. LSA-R.S. 17:5001 *et seq.* – establishes the Louisiana Taylor Opportunity Program for Students (TOPS) to be administered by the Board of Regents. 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.*
- s. LSA-R.S. 5081 – establishes the Louisiana Taylor Opportunity Program for Students (TOPS) TECH Early Start Award administered by the Board of Regents.
- t. LSA-R.S. 56:797.D(2) – allocates sixty thousand (60,000) dollars annually from the Rockefeller Wildlife Refuge and Game Preserve Fund to provide for undergraduate and graduate scholarships to Louisiana state colleges and universities for Louisiana residents to study in the fields of wildlife, forestry, or marine sciences, or study in curricula leading to study in such fields, such scholarships to have been approved by the Department of Wildlife and Fisheries for funding from such monies. The funds are to be allocated to the Governor's Special Commission on Educational Services [replaced by the Louisiana Student Financial Assistance Commission, then replaced by the Board of Regents] to fund the Rockefeller State Wildlife Scholarship Program.
- u. LSA-R.S. 46:230.1 *et seq.* and memorandum of understanding by and between the Louisiana Department of Children and Family Services (DCFS) and the Board of Regents – 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.
- v. Memorandum of Understanding by and between the Louisiana Department of Education (LDOE) and the Louisiana Office of Student Financial Assistance (LOSFA) to provide for the Board of Elementary and Secondary Education (BESE) Tuition Program for Teachers.

Unfunded Scholarship and Grant Programs

- w. LSA-R.S. 17:427.3 – establishes the Teach Louisiana First Program to be administered by the Louisiana Student Financial Assistance Commission [replaced by the Board of Regents in R.S. 36:651BB].

- x. LSA-R.S. 17:3041.10 *et seq.* – provides for a tuition payment program to be administered by the Louisiana Student Financial Assistance Commission [replaced by the Board of Regents in R.S. 36:651BB] 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.
- y. 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 [replaced by the Board of Regents in R.S. 36:651BB]. 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.
- z. 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 [replaced by the Board of Regents in R.S. 36:651BB].
- aa. LSA-R.S. 17:3042.61 *et seq.* – provides for a loan forgiveness program to be administered by the Louisiana Student Financial Assistance Commission [replaced by the Board of Regents in R.S. 36:651BB] 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.
- bb. LSA-R.S. 17:3045 *et seq.* – establishes the Louisiana Loan Opportunity Program to assist middle income students in meeting the rising costs of higher education to be administered by the Louisiana Student Financial Assistance Commission [replaced by the Board of Regents in R.S. 36:651BB].
- cc. LSA-R.S. 17:3137 – provides for the Louisiana Early Start Program (formerly the Dual Enrollment Program) established by the Board of Regents.
- dd. Memorandum of understanding by and between the Louisiana Board of Regents and the Louisiana Student Financial Assistance Commission – establishes the Health Care Educator Loan Forgiveness Program to be administered by the Louisiana Student Financial Assistance Commission.

APPENDIX D PROGRAM EVALUATION

Each division in LOSFA 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 LOSFA in administering them.

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

LOSFA 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 LOSFA, 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

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

LOSFA Management/Administration/Support Services Activity

OBJECTIVE I.1	LOSFA Compliance
OBJECTIVE I.2	LOSFA administrative costs of less than 4%
OBJECTIVE I.3	IT Security/Efficiency/Capacity
OBJECTIVE I.4	Human Resources Review
OBJECTIVE I.5	Annual number of Exceptions requests received Number of Exceptions requests processed by type Percentage change in Exceptions requests by type
OBJECTIVE I.6	Reserve Ratio – reserve balance/loans outstanding (K) Reserve fund balance Dollar Value of Outstanding Loan Guarantees Monitor Activities of Third Party Servicer
OBJECTIVE I.7	Number of audits planned to achieve compliance level Number of audits performed (K) Compliance level determined by audits (K)

Field Outreach Services Division and Public Information and Communications Division Activity

OBJECTIVE II.1	Digital Communication Activities
OBJECTIVE II.2	College Access Outreach Services
OBJECTIVE II.3	College Entry Public Education Activities
OBJECTIVE II.4	LOSFA Saving Programs Public Education Activities
OBJECTIVE II.5	Legislative BOR/Authority Public Education Activities

Scholarship & Grant Program Activity

OBJECTIVE III.1	Ratio of administrative costs to dollar value of scholarship and grant programs less than 4% (S)
OBJECTIVE III.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)
OBJECTIVE III.3	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 III.4	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 III.5	Number of students receiving TOPS Tech and TOPS Tech Early Start funding

Saving Programs Activity

OBJECTIVE IV.1	Number of START Accounts (K) START Account Principle Deposits (K) START Saving Fund disbursements (G)
OBJECTIVE IV.2	Number of LA ABLE Accounts (G) LA ABLE Account Principle Deposits (G) LA ABLE Saving Fund disbursements (G)
OBJECTIVE IV.3	Number of START K-12 Accounts (G) START K-12 Account Principle Deposits (G) START K-12 Saving Fund disbursements (G)

**ADMINISTRATION AND SUPPORT SERVICES
PERFORMANCE INDICATOR MATRIX**

PROGRAM OBJECTIVE	INPUTS	OUTPUTS	OUTCOMES	EFFICIENCY/QUALITY
Louisiana Office of Student Financial Assistance				
LOSFA Management/Administration/Support Services Program Activity				
I.1	LOSFA budget allocation. Periodic Employee Training.	Program Rules. START Disclosure Statement and Supplements. Federal Financial Reports. Compliance of requirements found in applicable laws, statutes, policies and procedures.	Increased compliance with applicable statutes, rules, guidance, directives, industry standards and ethical standards.	Number of Audit Findings minimized or eliminated.
I.2	LOSFA administrative costs.	LOSFA administrative costs of less than 4%.	Minimize administrative costs and maximize funds available for programs benefitting students.	Ratio of LOSFA total annual expenditures to LOSFA administrative cost.
I.3	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 LOSFA's staff Increased capacity to produce program performance data for dissemination to stakeholders
I.4	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

PROGRAM OBJECTIVE	INPUTS	OUTPUTS	OUTCOMES	EFFICIENCY/QUALITY
I.5	Annual number of Exceptions requests received	Number of Exceptions requests processed by type	Percentage change in Exceptions requests by type	Annual number of Exceptions requests received
I.6	Reserve fund balance. Dollar value of outstanding loan guarantees. Monitor Activities of third party servicer.	Federal Revenues for LOSFA Operating Fund.	Reserve ratio – reserve fund balance/loan guarantees outstanding. Compliance with federal requirements.	Regulatory compliance and management indicator of performance
I.7	Number of audits planned to achieve compliance level.	Number of audits performed.	Compliance level determined by audits.	Regulatory compliance and reduced audit findings.
Field Outreach Services Division and Public Information and Communications Division Activity				
II.1	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 texts, digital communications, and social media marketing sent.	Number of responses to incoming communications Number of responses to text and social media messages sent.	Decreased the number of incoming communications answered via phone and email Increased the response rate to constituents via email, text and/or social media messaging. Increased student interaction with LOSFA Student Hub. Increased awareness of LOSFA as a resource for all college access and financial assistance questions. Increase the response rate for texts received from students with additional questions. Decrease the number of schools experiencing a significant amount of TOPS processing errors.	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 OBJECTIVE	INPUTS	OUTPUTS	OUTCOMES	EFFICIENCY/QUALITY
II.2	<p>Number of identified target groups</p> <p>Number of identified partnership locations</p> <p>Number of 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 the 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 targeted groups.</p> <p>Number of school experiencing a significant amount of TOPS processing errors.</p>	<p>Increased awareness and availability of and eligibility for financial aid and TOPS programs within the target groups.</p> <p>Increased the number of completed FAFSA applications by students in statewide, intensive and concentrated service schools.</p> <p>Increased services provided to targeted schools over the previous year.</p> <p>Decrease in the frequencies of TOPS processing errors caused by students and/or counselors.</p>	<p>Percentage of targeted groups receiving awareness information on financial aid and TOPS requirements.</p> <p>Percentage of locations receiving FAFSA assistance</p>
II.3	<p>Number size, scope, and content of Louisiana College Access and Application Month locations served.</p> <p>Number of pre- and post-college access surveys issued to targeted groups.</p>	<p>Number of contacts made to entities within each target group for the purpose of scheduling training and/or outreach activities.</p> <p>Evidence that sufficient amounts of program information material was provided to reach 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>Increased participation in Louisiana College Access and 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 targeted groups receiving awareness of LOSFA's 5-Point match concept</p> <p>Percentage of Intensive and Concentrated Service schools receiving assistance for Louisiana College Access and 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>

PROGRAM OBJECTIVE	INPUTS	OUTPUTS	OUTCOMES	EFFICIENCY/QUALITY
II.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 people attending training and outreach activities.</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>Evidence that sufficient amounts of program information material was provided to reach targeted groups.</p>	<p>Increased participation in LOSFA saving programs by members of the targeted groups and partnerships.</p>	<p>Percentage of targeted groups and partnerships receiving information on LOSFA saving programs.</p>
II.5	<p>Number of incoming emails from legislators, Congressional delegation members, and BOR/LATTA members.</p> <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 legislator and congressional delegation emails responded to within 1 business day.</p> <p>Number of legislators and congressional delegation members attending LOSFA events in their districts.</p>	<p>Percentage of email legislators and congressional delegation member responses.</p> <p>Percentage of legislators and congressional delegation members attending LOSFA events in their districts.</p> <p>Percentage of other inquiries (phone, letters, etc.)</p>	<p>Email response rates to legislators and congressional delegation within 1 business day.</p>
Scholarship and Grant Program Activity				
III.1	<p>Budget for administrative costs for the State Fiscal Year.</p>	<p>Dollar value of state scholarship and grant program awards.</p>	<p>Minimize program costs to maximize funding available to program participants</p>	<p>Ratio of administrative costs to dollar value of scholarship and grant programs less than 4%.</p>

PROGRAM OBJECTIVE	INPUTS	OUTPUTS	OUTCOMES	EFFICIENCY/QUALITY
III.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.	<p>Make postsecondary education affordable through financial aid programs administered by LOSFA.</p> <p>Increase access by providing training to students and parents on postsecondary topics.</p> <p>Increase the number of students receiving postsecondary educations through funding provided by LOSFA.</p>	Maximize the number of students receiving postsecondary education at the lowest cost to the state.
III.3	<p>Number of Louisiana high school graduates in most recent class.</p> <p>Number of students applying for a TOPS award in each application year.</p>	Number of applicants processed.	<p>Percentage of participation of most recent graduates.</p> <p>Percentage of applicants processed from total records received.</p> <p>Percentage change in participation of most recent high school graduates.</p>	Process 97% of applicants no later than September 1st of their application year.
III.4	<p>Date of receipt of billing request.</p> <p>Date billing request verified and all errors corrected.</p>	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.
III.5	<p>Dollar value of TOPS Tech and TOPS Tech Early Start.</p> <p>Number of students eligible for TOPS Tech and TOPS Tech Early Start.</p>	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.

PROGRAM OBJECTIVE	INPUTS	OUTPUTS	OUTCOMES	EFFICIENCY/QUALITY
Saving Program Activity				
IV.1	Number of accounts and dollar value of principal deposits.	START Account 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.
IV.2	Number of LA ABLE accounts and dollar value of principal deposits.	LA ABLE Account disbursements.	Encourages family planning and saving for the financing of certain qualified expenses of persons with disabilities. Promotes economic self-reliance.	Ability to attract investors and maximize their investments.
IV.3	Number of START K-12 accounts and dollar value of principal deposits.	START K-12 Account disbursements.	Encourages family planning and saving for the financing of certain qualified K-12 educational expenses.	Ability to attract investors and maximize their investments.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: LOSFA Management/Administration/Support Services

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.1

Indicator Name: LOSFA Compliance

Indicator LaPAS PI Code: None

1. Type and Level: Outcome/None
2. Rationale: LOSFA 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 in the development of student financial aid policies, plans and programs and ensure compliance with applicable statutes, rules, guidance, directives, industry standards and ethical standards.
3. Use: The indicator is used for internal management purposes.
4. Clarity: This indicator examines LOSFA's compliance with applicable statutes, rules, guidance, directives, industry standards and ethical standards.
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 LOSFA's records and documentation and is examined on a state fiscal year basis. Audits conducted on LOSFA and LOSFA's programs are examined for issues that impact compliance.
7. Calculation Methodology: The indicator tracks the efforts of LOSFA in the development of student financial aid plans, policies and programs and their compliance with applicable statutes, rules, guidance, directives, industry standards and ethical standards.
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 Brett Hunt, Division Director, Finance and Accounting Division, Phone: 225-219-7509; FAX: 225-208-1258; Email: brett.hunt@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: LOSFA Management/Administration/Support Services

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.2

Indicator Name: LOSFA administrative costs of less than 4%

Indicator LaPAS PI Code: 25967

- 1 Type and Level: Efficiency/Supporting
- 2 Rationale: Administrative costs are an essential part of conducting business. Objective I.2 provides a goal to limit administrative costs to less than 4% of LOSFA's total annual expenditures. This indicator shows the success of LOSFA in controlling administrative costs and its operating efficiency.
- 3 Use: This measure is used to monitor LOSFA's administrative costs and evaluate if these costs remain consistent with LOSFA's budget. The indicator is reported for performance-based budgeting purposes.
- 4 Clarity: The indicator shows the relationship between LOSFA's administrative costs and its budget/START contributions, not LOSFA'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 LOSFA'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 LOSFA indicators.
- 9 Caveats: There are no caveats for this indicator.
- 10 Responsible Person: Contact Brett Hunt, Division Director, Finance and Accounting Division, Phone: 225-219-7509; FAX: 225-208-1258; Email: brett.hunt@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: LOSFA Management/Administration/Support Services

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.3

Indicator Name: IT Security/Efficiency/Capacity

Indicator LaPAS PI Code: None

1. Type and Level: Output/None
2. Rationale: This indicator examines LOSFA's success in introducing new technology and developing new software enhancements to increase customer access to LOSFA 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 LOSFA. 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 LOSFA in using technology to expand access for its internal and external customers to information in LOSFA'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 LOSFA'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 LOSFA.
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 performance of LOSFA's Information Technology Division.
 - 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.
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.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: LOSFA Management/Administration/Support Services

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.4

Indicator Name: Human Resources Review

Indicator LaPAS PI Code: None

1. Type and Level: Outcome/None
2. Rationale: LOSFA Human Resources Division'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, and to staff positions at Board of Regents and LUMCON. To accomplish this objective, the LOSFA Human Resources Division is required to abide by a multitude of federal and state statutes, regulations and directives concerning its workforce. This indicator examines the division's success in building a quality workforce for BOR, LOSFA and LUMCON 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 LOSFA Human Resources Division'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 BOR's, LOSFA's and LUMCON's missions and goals.
4. Clarity: This indicator primarily looks at the success of LOSFA Human Resources Division'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 division.
6. Data Source, Collection and Reporting: The source of data is LOSFA Human Resources Division'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 Cory Wicker, Human Resources Manager, Human Resources Division, Phone: 225-219-7661; FAX: 225-208-1693; Email: cory.wicker@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: LOSFA Management/Administration/Support Services

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.5

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 LOSFA'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.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: LOSFA Management/Administration/Support Services

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.5

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 LOSFA'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.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: LOSFA Management/Administration/Support Services

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.5

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 LOSFA'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.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: LOSFA Management/Administration/Support Services

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.6

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 LOSFA's student loan administration in regards to the Federal Family Education Loan Program (FFELP). It shows the success of LOSFA in maintaining the federally mandated minimum of a reserve ratio of 0.25%, which is an indication LOSFA has sufficient funds on hand to cover the cost of paying lenders for defaulted student loans guaranteed by LOSFA.
3. Use: The indicator is used to monitor the LOSFA's compliance with the federal mandate to maintain a 0.25% reserve ratio and as an indicator of the financial health of LOSFA 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 entity 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 FFELP was terminated by Congress and no new student loans have been originated since June 2010. LOSFA has contracted with a third party servicer to service the existing loans in LOSFA's portfolio.
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, Board of Regents 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 LOSFA and the total balance of the funds in LOSFA's federal fund.
9. Caveats: There are no caveats for this indicator.
10. Responsible Person: Contact Brett Hunt, Division Director, Finance and Accounting Division, Phone: 225-219-7509; FAX: 225-208-1258; Email: brett.hunt@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: LOSFA Management/Administration/Support Services

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.6

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 LOSFA's student loan administration in regards to the Federal Family Education Loan Program (FFELP). It shows the success of LOSFA in maintaining the federally mandated minimum a reserve ratio of 0.25%, which is an indication LOSFA has sufficient funds on hand to cover the cost of paying lenders for defaulted student loans guaranteed by LOSFA. This indicator is required to calculate the reserve ratio.
3. Use: LOSFA uses the indicator to monitor the fiscal health of LOSFA 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 entity 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 LOSFA. The FFELP was terminated by Congress and no new student loans have been originated since June 2010.
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, Board of Regents and federal Department of Education.
7. Calculation Methodology: The indicator reports the current balance of LOSFA'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 LOSFA's federal reserve fund balance.
9. Caveats: There are no caveats for this indicator.
10. Responsible Person: Contact Brett Hunt, Division Director, Finance and Accounting Division, Phone: 225-219-7509; FAX: 225-208-1258; Email: brett.hunt@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: LOSFA Management/Administration/Support Services

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.6

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 LOSFA's student loan administration in regards to the Federal Family Education Loan Program (FFELP). It shows the success of LOSFA in maintaining the federally mandated minimum of a reserve ratio of 0.25%, which is an indication LOSFA has sufficient funds on hand to cover the cost of paying lenders for defaulted student loans guaranteed by LOSFA. This indicator is required to calculate the reserve ratio.
3. Use: LOSFA 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 entity 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 LOSFA. The FFELP was terminated by Congress and no new student loans have been originated since June 2010.
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, Board of Regents 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 LOSFA. The dollar value reported is the current balance as of the end of the reporting period.
8. Scope: The indicator reports LOSFA's current outstanding loan balance.
9. Caveats: There are no caveats for this indicator.
10. Responsible Person: Contact Brett Hunt, Division Director, Finance and Accounting Division, Phone: 225-219-7509; FAX: 225-208-1258; Email: brett.hunt@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: LOSFA Management/Administration/Support Services

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.6

Indicator Name: Monitor Activities of Third Party Servicer

Indicator LaPAS PI Code: None

1. Type and Level: Input/None
2. Rationale: Through competitive bidding, LOSFA has selected a third party servicer to perform guaranty services at the highest level of efficiency with the lowest cost and greatest return to LOSFA and the state. 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 entity 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 FFELP was terminated by Congress and no new student loans have been originated since June 2010.
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 LOSFA'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 LOSFA's efforts to monitor the activities of the third party servicer.
9. Caveats: There are no caveats for this indicator.
10. Responsible Person: Contact Brett Hunt, Division Director, Finance and Accounting Division, Phone: 225-219-7509; FAX: 225-208-1258; Email: brett.hunt@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: LOSFA Management/Administration/Support Services

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.7

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 LOSFA staff) comply with applicable statutes, regulations and directives. This indicator tracks the Audit Division's performance.
3. Use: This measure is used to monitor LOSFA'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 LOSFA'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 Board of Regents, 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.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: LOSFA Management/Administration/Support Services

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.7

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 LOSFA staff) comply with applicable statutes, regulations and directives. This indicator tracks the Audit Division's performance.
3. Use: This measure is used to monitor LOSFA'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 LOSFA'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.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: LOSFA Management/Administration/Support Services

State Outcome Goal: Higher Ed. Non-Formula

Objective: I.7

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 LOSFA 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 LOSFA'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 LOSFA'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.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Field Outreach Services Division and Public Information and Communications Division

State Outcome Goal: Higher Ed. Non-Formula

Objective: II.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 LOSFA's output and efficiency in educating the public, schools, guidance counselors, and others on LOSFA's programs through its outreach programs through digital communications.
3. Use: The indicator is used for internal management purposes.
4. Clarity: The indicator examines LOSFA's outreach programs that educate LOSFA's customers and the public on the programs administered by LOSFA 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 LOSFA'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 LOSFA.
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 LOSFA'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 Brittany Francis, Division Director, Public Information and Communications Division, Phone: 225-219-3306; FAX: 225-208-1496; Email: brittany.francis@la.gov or Tireka Cobb, Division Director, Field Outreach Services Division, Phone: 225-219-0920; FAX: 225-208-1597; Email: tireka.cobb@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Field Outreach Services Division and Public Information and Communications Division

State Outcome Goal: Higher Ed. Non-Formula

Objective: II.2

Indicator Name: College Access Outreach Services

Indicator LaPAS PI Code: None

1. Type and Level: Output/None
2. Rationale: This indicator is used to monitor LOSFA's output and efficiency in educating the public, schools, guidance counselors, and others on LOSFA's programs through its outreach programs.
3. Use: The indicator is used for internal management purposes.
4. Clarity: The indicator examines LOSFA's outreach programs that educate LOSFA's customers and the public on the programs administered by LOSFA 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 LOSFA'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 LOSFA.
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 LOSFA'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 Brittany Francis, Division Director, Public Information and Communications Division, Phone: 225-219-3306; FAX: 225-208-1496; Email: brittany.francis@la.gov or Tireka Cobb, Division Director, Field Outreach Services Division, Phone: 225-219-0920; FAX: 225-208-1597; Email: tireka.cobb@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Field Outreach Services Division and Public Information and Communications Division

State Outcome Goal: Higher Ed. Non-Formula

Objective: IL.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 LOSFA'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 LOSFA's outreach and advertising programs that educate LOSFA'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 LOSFA's records and documentation for the outreach and advertising programs conducted by LOSFA 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 LOSFA'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 Brittany Francis, Division Director, Public Information and Communications Division, Phone: 225-219-3306; FAX: 225-208-1496; Email: brittany.francis@la.gov or Tireka Cobb, Division Director, Field Outreach Services Division, Phone: 225-219-0920; FAX: 225-208-1597; Email: tireka.cobb@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Field Outreach Services Division and Public Information and Communications Division

State Outcome Goal: Higher Ed. Non-Formula

Objective: IL.4

Indicator Name: LOSFA Saving Programs Public Education Activities

Indicator LaPAS PI Code: None

1. Type and Level: Output/None
2. Rationale: This indicator is used to monitor LOSFA'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, LA ABLE Saving Program and START K-12 Saving Program through its outreach programs and advertising campaigns.
3. Use: The indicator is used for internal management purposes.
4. Clarity: The indicator examines LOSFA's outreach and advertising programs that educate LOSFA's customers and the public on the START Saving Program, LA ABLE Saving Program, and START K-12 Saving 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 LOSFA's records and documentation for the outreach and advertising programs conducted by LOSFA 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 LOSFA saving programs.
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 LOSFA saving programs. It is not one indicator but a series of indicators reporting the results of LOSFA'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 LOSFA saving programs by members of the targeted groups and partnerships.
10. Responsible Person: Contact Brittany Francis, Division Director, Public Information and Communications Division, Phone: 225-219-3306; FAX: 225-208-1496; Email: brittany.francis@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Field Outreach Services Division and Public Information and Communications Division

State Outcome Goal: Higher Ed. Non-Formula

Objective: II.5

Indicator Name: Legislative BOR/Authority Public Education Activities

Indicator LaPAS PI Code: None

1. Type and Level: Output/None
2. Rationale: This indicator is used to monitor LOSFA's output and efficiency in educating legislators (both in-state and nationally) and Board of Regents and Louisiana Tuition Trust 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 LOSFA'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 LOSFA's records and documentation for the outreach and advertising programs conducted by LOSFA 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 LOSFA'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 Brittany Francis, Division Director, Public Information and Communications Division, Phone: 225-219-3306; FAX: 225-208-1496; Email: brittany.francis@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Scholarship & Grant Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: III.1

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

Indicator LaPAS PI Code: 20961

1. Type and Level: Efficiency/Supporting
2. Rationale: Administrative costs are an essential part of conducting business and Objective III.1 sets as a goal the limiting of these costs to less than 4% of LOSFA's total disbursements of scholarship and grant awards. This indicator shows the success of LOSFA in controlling the administrative costs associated with the administration and management of the LOSFA saving programs and scholarship and grant programs and their operating efficiency.
3. Use: This measure is used to monitor LOSFA's Scholarship and Grant and START Divisions' administrative costs and evaluate if these costs remain consistent with LOSFA'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 LOSFA's Scholarship and Grant and START Divisions' administrative costs and its disbursement of scholarships and grants and START contributions, not LOSFA'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 LOSFA indicators.
9. Caveats: There are no caveats for this indicator.
10. Responsible Person: Contact Brett Hunt, Division Director, Finance and Accounting Division, Phone: 225-219-7509; FAX: 225-208-1258; Email: brett.hunt@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Scholarship & Grant Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: III.2

Indicator Name: Number of recipients: Rockefeller

Indicator LaPAS PI Code: 11386

1. Type and Level: Output/General Performance Indicator
2. Rationale: LOSFA provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by LOSFA to show the usage and general status of these programs to decision makers.
3. Use: LOSFA 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 at a Louisiana public college/university.
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 LOSFA'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 LOSFA 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 Deborah Paul, Division Director, Scholarship and Grant Programs, Phone: 225-219-7840; FAX: 225-612-6508; Email: deborah.paul@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Scholarship & Grant Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: III.2

Indicator Name: Total Appropriated: Rockefeller

Indicator LaPAS PI Code: 20970

1. Type and Level: Output/General Performance Indicator
2. Rationale: LOSFA provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by LOSFA to show the usage and general status of these programs to decision makers.
3. Use: LOSFA 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 at a Louisiana public college/university.
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 LOSFA'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 Deborah Paul, Division Director, Scholarship and Grant Programs, Phone: 225-219-7840; FAX: 225-612-6508; Email: deborah.paul@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Scholarship & Grant Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: III.2

Indicator Name: Total Awarded: Rockefeller

Indicator LaPAS PI Code: 11424

1. Type and Level: Output/General Performance Indicator
2. Rationale: LOSFA provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by LOSFA to show the usage and general status of these programs to decision makers.
3. Use: LOSFA 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 at a Louisiana public college/university.
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 LOSFA'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 LOSFA 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 LOSFA from reallocating the funds to another student in time to be disbursed for that state fiscal year.
10. Responsible Person: Contact Deborah Paul, Division Director, Scholarship and Grant Programs, Phone: 225-219-7840; FAX: 225-612-6508; Email: deborah.paul@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Scholarship & Grant Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: III.2

Indicator Name: Average Amount Awarded: Rockefeller

Indicator LaPAS PI Code: 11393

1. Type and Level: Output/General Performance Indicator
2. Rationale: LOSFA provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by LOSFA to show the usage and general status of these programs to decision makers.
3. Use: LOSFA 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 at a Louisiana public college/university.
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 LOSFA'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 Deborah Paul, Division Director, Scholarship and Grant Programs, Phone: 225-219-7840; FAX: 225-612-6508; Email: deborah.paul@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Scholarship & Grant Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: III.2

Indicator Name: Louisiana GO Grant recipients

Indicator LaPAS PI Code: 22245

1. Type and Level: Output/General Performance Indicator
2. Rationale: LOSFA provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by LOSFA to show the usage and general status of these programs to decision makers.
3. Use: LOSFA 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 LOSFA's records, documentation, and financial records and it is gathered from data submitted from colleges and universities that bill LOSFA 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 LOSFA.
10. Responsible Person: Contact Deborah Paul, Division Director, Scholarship and Grant Programs, Phone: 225-219-7840; FAX: 225-612-6508; Email: deborah.paul@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Scholarship & Grant Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: III.2

Indicator Name: Total Appropriated: Louisiana GO Grants

Indicator LaPAS PI Code: 22246

1. Type and Level: Output/General Performance Indicator
2. Rationale: LOSFA provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by LOSFA to show the usage and general status of these programs to decision makers.
3. Use: LOSFA 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 LOSFA's records, documentation, and financial records and it is gathered from data submitted from colleges and universities that bill LOSFA 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 Deborah Paul, Division Director, Scholarship and Grant Programs, Phone: 225-219-7840; FAX: 225-612-6508; Email: deborah.paul@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Scholarship & Grant Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: III.2

Indicator Name: Total Awarded: Louisiana GO Grants

Indicator LaPAS PI Code: 22247

1. Type and Level: Output/General Performance Indicator
2. Rationale: LOSFA provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by LOSFA to show the usage and general status of these programs to decision makers.
3. Use: LOSFA 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 LOSFA's records, documentation, and financial records and it is gathered from data submitted from colleges and universities that bill LOSFA 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 LOSFA.
10. Responsible Person: Contact Deborah Paul, Division Director, Scholarship and Grant Programs, Phone: 225-219-7840; FAX: 225-612-6508; Email: deborah.paul@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Scholarship & Grant Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: III.2

Indicator Name: Louisiana GO Grant Average Award

Indicator LaPAS PI Code: 22248

1. Type and Level: Output/General Performance Indicator
2. Rationale: LOSFA provides general data such as number of recipients, total appropriated, total awarded, and average amount awarded for scholarship and/or grant programs administered by LOSFA to show the usage and general status of these programs to decision makers.
3. Use: LOSFA 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 LOSFA's records, documentation, and financial records and it is gathered from data submitted from colleges and universities that bill LOSFA 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 22247) by the Louisiana GO Grant recipients (LaPAS PI Code 22245).
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 LOSFA.
10. Responsible Person: Contact Deborah Paul, Division Director, Scholarship and Grant Programs, Phone: 225-219-7840; FAX: 225-612-6508; Email: deborah.paul@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Scholarship & Grant Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: III.3

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 LOSFA'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, Louisiana private schools that are members of the Louisiana Association of Independent Colleges and Universities (LAICU) and approved proprietary schools. 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 LOSFA'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 LOSFA 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 LOSFA from making an initial eligibility determination.
8. Scope: The data is aggregated from information in LOSFA'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. LOSFA uses the students' graduation date and ACT score data to arrive at a proxy for this indicator.
10. Responsible Person: Contact Deborah Paul, Division Director, Scholarship and Grant Programs, Phone: 225-219-7840; FAX: 225-612-6508; Email: deborah.paul@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Scholarship & Grant Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: III.3

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 III.3 establishes a LOSFA 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 LOSFA for TOPS awards for the Fall Semester/Quarter.
3. Use: The indicator is used to show LOSFA'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, Louisiana private schools that are members of the Louisiana Association of Independent Colleges and Universities (LAICU) and approved proprietary schools. 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 LOSFA'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 LOSFA's control.
10. Responsible Person: Contact Deborah Paul, Division Director, Scholarship and Grant Programs, Phone: 225-219-7840; FAX: 225-612-6508; Email: deborah.paul@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Scholarship & Grant Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: III.3

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 III.3 establishes a LOSFA goal to determine the TOPS eligibility of 97% of all applicants by September 1st of each application year. This indicator indicates the success of LOSFA in attaining that goal. This deadline is significant since it occurs just before the date at which the schools can first start billing LOSFA for TOPS awards for the Fall Semester/Quarter.
3. Use: The indicator is used to show LOSFA'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, Louisiana private schools that are members of the Louisiana Association of Independent Colleges and Universities (LAICU) and approved proprietary schools. 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 LOSFA'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 Deborah Paul, Division Director, Scholarship and Grant Programs, Phone: 225-219-7840; FAX: 225-612-6508; Email: deborah.paul@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Scholarship & Grant Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: III.4

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 LOSFA 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 LOSFA's success in providing a high level of customer service. Objective III.4 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, eligible Louisiana private schools that are members of the Louisiana Association of Independent Colleges and Universities (LAICU) and approved proprietary schools.
5. Validity, Reliability and Accuracy: This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid, and it is accurately and reliably reported.
6. Data Source, Collection and Reporting: The source of data for this indicator is LOSFA'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 LOSFA 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 Deborah Paul, Division Director, Scholarship and Grant Programs, Phone: 225-219-7840; FAX: 225-612-6508; Email: deborah.paul@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Scholarship & Grant Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: III.4

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 LOSFA 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 LOSFA's success in providing a high level of customer service. Objective III.4 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, eligible Louisiana private schools that are members of the Louisiana Association of Independent Colleges and Universities (LAICU) and approved proprietary schools.
5. Validity, Reliability and Accuracy: This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid, and it is accurately and reliably reported.
6. Data Source, Collection and Reporting: The source of data for this indicator is LOSFA'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 LOSFA 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 LOSFA 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 LOSFA 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 Deborah Paul, Division Director, Scholarship and Grant Programs, Phone: 225-219-7840; FAX: 225-612-6508; Email: deborah.paul@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Scholarship & Grant Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: III.4

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 LOSFA 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 LOSFA's success in providing a high level of customer service. Objective III.4 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, eligible Louisiana private schools that are members of the Louisiana Association of Independent Colleges and Universities (LAICU) and approved proprietary schools.
5. Validity, Reliability and Accuracy: This indicator has not been audited by the Office of the Legislative Auditor. The indicator is considered valid, and it is accurately and reliably reported.
6. Data Source, Collection and Reporting: The source of data for this indicator is LOSFA'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 LOSFA 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 Deborah Paul, Division Director, Scholarship and Grant Programs, Phone: 225-219-7840; FAX: 225-612-6508; Email: deborah.paul@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Scholarship & Grant Program

State Outcome Goal: Higher Ed. Non-Formula

Objective: III.5

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, Louisiana private schools that are members of the Louisiana Association of Independent Colleges and Universities (LAICU) and approved proprietary schools. The TOPS Tech Award is limited to specific programs and may not be used at some colleges and universities. The TOPS Tech Early Start is limited to specific programs at public colleges and universities.
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 LOSFA's database, records, documentation, and financial records and it is gathered from data submitted from colleges and universities that bill LOSFA 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: LOSFA'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 LOSFA 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: Contact Deborah Paul, Division Director, Scholarship and Grant Programs, Phone: 225-219-7840; FAX: 225-612-6508; Email: deborah.paul@la.gov.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Saving Programs

State Outcome Goal: Higher Ed. Non-Formula

Objective: IV.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 saving plan).
3. Use: The indicator is used to track the growth of the START Saving Program and evaluate the success of LOSFA 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 saving plan, which is a Qualified Tuition Plan under Section 529 of the Internal Revenue Code. It is an innovative college saving 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 LOSFA'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 Saving Program accounts. One account with multiple owners is considered as one account, while several accounts by one owner would be counted separately.
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.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Saving Programs

State Outcome Goal: Higher Ed. Non-Formula

Objective: IV.2

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 saving plan).
3. Use: The indicator is used to track the growth of the START Saving Program and evaluate the success of LOSFA 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 saving plan, which is a Qualified Tuition Plan under Section 529 of the Internal Revenue Code. It is an innovative college saving 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 LOSFA'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 Saving Program accounts on a specific day.
8. Scope: The indicator is aggregated and sums the total amount invested in the program on a specific day, 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.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Saving Programs

State Outcome Goal: Higher Ed. Non-Formula

Objective: IV.3

Indicator Name: START Saving 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 Saving Program.
3. Use: The indicator is used to track the growth in START Saving Program disbursements to monitor the workload of the START Division Staff as the program matures. The indicator is reported for performance-based budgeting purposes.
4. Clarity: The START Saving Program is a college saving plan, which is a Qualified Tuition Plan under Section 529 of the Internal Revenue Code. It is an innovative college saving 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 LOSFA'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 Saving accounts.
8. Scope: The indicator is aggregated and sums the total amount disbursed for any purpose from the START Saving 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.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Saving Programs

State Outcome Goal: Higher Ed. Non-Formula

Objective: IV.2

Indicator Name: Number of LA ABLE Accounts

Indicator LaPAS PI Code: New

1. Type and Level: Output/General Performance Indicator
2. Rationale: This indicator tracks the number of accounts that have been opened in the LA ABLE Saving Program (the state's IRS Section 521 saving plan).
3. Use: The indicator is used to track the growth of the LA ABLE Saving Program and evaluate the success of LOSFA 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 LA ABLE Saving Program is a saving 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 LOSFA'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 LA ABLE Saving Program accounts. One account with multiple owners is considered as one account, while several accounts by one owner would be counted separately.
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.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Saving Programs

State Outcome Goal: Higher Ed. Non-Formula

Objective: IV.2

Indicator Name: LA ABLE Account Principal Deposits

Indicator LaPAS PI Code: New

1. Type and Level: Output/General Performance Indicator
2. Rationale: This indicator tracks the total dollar value of the principal deposits invested in the LA ABLE Account Saving Program (the state's IRS Section 521 saving plan).
3. Use: The indicator is used to track the growth of the LA ABLE Saving Program and evaluate the success of LOSFA in attracting investors to save for allowable expenses for persons with disabilities. The indicator is reported for performance-based budgeting purposes.
4. Clarity: The LA ABLE Saving Program is a saving 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 LOSFA'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 LA ABLE Saving Program accounts on a specific day.
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.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Saving Programs

State Outcome Goal: Higher Ed. Non-Formula

Objective: IV.3

Indicator Name: LA ABLE Saving 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 LA ABLE Saving Program.
3. Use: The indicator is used to track the growth in LA ABLE Saving Program disbursements to monitor the workload of the START Division Staff as the program matures. The indicator is reported for performance-based budgeting purposes.
4. Clarity: The LA ABLE Saving Program is a saving 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 LOSFA'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 LA ABLE Saving accounts.
8. Scope: The indicator is aggregated and sums the total amount disbursed for any purpose from the LA ABLE Saving 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.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Saving Programs

State Outcome Goal: Higher Ed. Non-Formula

Objective: IV.3

Indicator Name: Number of START K-12 Accounts

Indicator LaPAS PI Code: New

1. Type and Level: Output/General Performance Indicator
2. Rationale: This indicator tracks the number of accounts that have been opened in the START K-12 Saving Program (the state's IRS Section 529 saving plan).
3. Use: The indicator is used to track the growth of the START K-12 Saving Program and evaluate the success of LOSFA in attracting investors to save for the allowable tuition expenses related to attendance at any Louisiana school that provides K-12 instruction. The indicator is reported for performance-based budgeting purposes.
4. Clarity: The START K-12 Saving Program is a saving plan for families to save for tuition expenses for attendance at a k-12 school, which is a Qualified Tuition Plan under Section 529 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 LOSFA'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 K-12 Saving Program accounts. One account with multiple owners is considered as one account, while several accounts by one owner would be counted separately.
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.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Saving Programs

State Outcome Goal: Higher Ed. Non-Formula

Objective: IV.3

Indicator Name: START K-12 Account Principal Deposits

Indicator LaPAS PI Code: New

1. Type and Level: Output/General Performance Indicator
2. Rationale: This indicator tracks the total dollar value of the principal deposits invested in the START K-12 Saving Program (the state's IRS Section 529 saving plan).
3. Use: The indicator is used to track the growth of the START K-12 Saving Program and evaluate the success of LOSFA in attracting investors to save for the allowable tuition expenses related to attendance at any Louisiana school that provides K-12 instruction. The indicator is reported for performance-based budgeting purposes.
4. Clarity: The START K-12 Saving Program is a saving plan for families to save for tuition expenses for attendance at a K-12 school, which is a Qualified Tuition Plan under Section 529 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 LOSFA'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 the START K-12 Saving Program accounts on a specific day.
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.

PERFORMANCE INDICATOR DOCUMENTATION

Program: LOUISIANA OFFICE OF STUDENT FINANCIAL ASSISTANCE

Program Activity: Saving Programs

State Outcome Goal: Higher Ed. Non-Formula

Objective: IV.3

Indicator Name: START K-12 Saving Fund disbursements

Indicator LaPAS PI Code: New

11. Type and Level: Output/General Performance Indicator
12. Rationale: This indicator tracks the total disbursements for a state fiscal year from the START K-12 Saving Program.
13. Use: The indicator is used to track the growth in START K-12 Saving Program disbursements to monitor the workload of the START Division Staff as the program matures. The indicator is reported for performance-based budgeting purposes.
14. Clarity: The START K-12 Saving Program is a saving plan for families to save for tuition expenses for attendance at a K-12 school, which is a Qualified Tuition Plan under Section 529 of the Internal Revenue Code.
15. 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.
16. Data Source, Collection and Reporting: The source of data is LOSFA'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.
17. Calculation Methodology: The indicator is the sum of all disbursements from START K-12 Saving accounts.
18. Scope: The indicator is aggregated and sums the total amount disbursed for any purpose from the START K-12 Saving Program accounts. The data can be disaggregated by type of disbursement.
19. Caveats: There are no caveats for this indicator.
20. Responsible Person: Contact Carol Fulco, START Administrator, START Division, Phone: 225-219-7705; FAX: 225-612-6497; Email: carol.fulco@la.gov.

APPENDIX G

DUPLICATION OF EFFORT

LOSFA avoids duplication of effort through its organizational structure. All personnel and assets that would have a commonality in each division are found in the LOSFA Management/Administration/Support Services Activity. This activity provides assistance to the operational program activities, which are: Field Outreach Services Division and Public Information and Communications Division, Scholarship and Grants Division and Saving Program Division, thereby avoiding duplication of personnel and assets across divisions.

The LOSFA Management/Administration/Support Services Activity consists of the following divisions: Executive Management, 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 Board of Regents (for LOSFA Programs), the Louisiana Tuition Trust Authority (LATTA), LOSFA Advisory Committee and LOSFA.

The operational programs, Field Outreach Services Division and Public Information and Communications Division, Scholarship and Grants Division and Saving Program Division 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

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

Children's Budget

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