1. Executive Summary

1.1 Name of the Unit

Upward Bound Program

1.2 Description of unit and its mission

The Upward Bound Program is a pre-college program designed to generate in its participants the skills and motivation necessary to persist in completing a program of secondary education and to succeed in a program of postsecondary education.

1.3 Assessment of the unit

The Loyola University New Orleans Upward Bound Program is assessed annually by the U.S. Department of Education through an Annual Performance Report (APR). The APR measures the program’s success in meeting its approved program objectives. Through this assessment detailed information is provided on prior year and current participants.

1.4 Goals of the unit

The goal of the unit is to achieve the program objectives approved by the U.S. Department of Education.

1.5 Review of the past and current budgets

A review of the past and current budgets indicates both budgets were adequate, and the program operated within the guidelines set by the U.S. Department of Education and University fiscal policy.

1.6 Resources needs/wants/reallocation

The resources needed to successfully operate the Upward Bound Program are outlined in the funded grant proposal submitted to the U.S. Department of Education. Essential to the Program will be continued use of classrooms in Monroe Hall and other resources (i.e. science labs, IT support, and support of key university personnel).

1.7 Summary of achievements

The program achieved several milestones during the 2006-2007 academic year. A year after Hurricane Katrina, the program was able to serve 85 students which exceeded the program requirements of 83. During the 2005-2006 academic year, the
program struggled to serve 30 participants after losing 45 participants who were displaced by Hurricane Katrina when the campus reopened January 2006. Also, the program was re-funded during the 2006 grant competition with a 4% increase to the overall operating budget.

2. **Identification of the Unit**

Loyola University New Orleans Upward Bound Program

2.1 The Upward Bound Program is a federally funded pre-college program designed to generate in its participants the skills and motivation necessary to persist in completing a program of secondary education and to enter and succeed in a program of postsecondary education.

2.2 The Loyola University Upward Bound Program is one of seven federally funded TRIO programs which were funded under Title IV of the Higher Education Act. The Upward Bound Program is a year-round academic program which provides supplemental instruction and college preparation to 83 students at 4 Jefferson Parish High Schools: Helen Cox, John Ehret, L.W. Higgins, and West Jefferson High. The program consists of three (3) components: a six-week summer component, a bridge component, and an academic year component.

2.2.1 Headcounts
The Upward Bound Program employed 17 part-time staff which included student workers, student assistants, and instructors. During the same period, the program employed the following three (3) full-time staff positions: Director, Program Services Coordinator, and Administrative Coordinator.

2.2.2 Headcount is not applicable to the program.

2.2.3 Headcount and student credit hours are not applicable to the program.

2.2.4 Headcount and student credit hours are not applicable to the program.

3. **Assessment**

3.1 The Upward Bound Program is assessed annually through the Annual Performance Report (APR) submitted to the U.S. Department of Education. This detailed report gives current information on all program participants (current and prior year participants) served during the reporting period 2006-2007 along with information regarding the attainment of program objectives.

3.2 The following are the program’s 2006 objectives as approved by the U.S. Department of Education:
60% of participants will demonstrate a 1 point improvement in language arts or math as measured by the ACT.

**Results:** Of the 73 non-bridge participants served during the 2006-2007 academic year, 54 participants were administered both a pre-test and a post-test. Of the number, 46 (85%) increased their scores in at least one sub-test. Due to the many challenges encountered during the 2006-2007 academic year, all participants were not present for the administration of both the pre-test and post-test.

60% of the program participants will show an increase of their overall GPA by the end of each programmatic year with an average of at least .1 points.

**Results:** The program did not meet this objective due to extenuating circumstances. Due to the displacement of all participants during the 2005-2006 year, the ability to accurately calculate certain cumulative GPA’s was not achievable. Every effort was made to gather the necessary information and these efforts will continue. However, 60% of participant cumulative GPA’s were deemed inconclusive. Complete records were obtained for 26% of the participants served. Of that 26%, all showed an increase of at least .1 in their cumulative GPA. Two years after the storm, many participants are still recovering from the aftermath of Hurricane Katrina.

71% of program participants will be retained in the project through the beginning of the next program year or will graduate from high school.

**Results:** The Loyola University New Orleans Upward Bound Program retained or graduated 83.85 of the 85 participants served by the program during the 2006-2007 year. 49 participants began the project year, and during the program year, 36 participants were admitted. At the end of the 2006-2007 program year, 19 (22.35%) graduated and 52 (61.17% continued in high school and persisted in the program.

70% of high school seniors will enroll in a program of postsecondary education this year.

**Results:** 19 program participants completed the Loyola University New Orleans Upward Bound Program. Of that number, 17 (89%) are enrolled in a postsecondary program, which exceeds the program objective of 70%.

10% of participants (students who participated in the program for at least 10 days in the summer or 60 days in the academic year component) who were scheduled to graduate in the spring of 2006 will enroll in a program of postsecondary for the next fall term.

**Results:** 23 program participants were scheduled to graduate during the 2006-2007 academic year. Of that number, 20 (87%) are currently enrolled in a program of postsecondary study. This number far exceeds the program objective.
35% of participants, who have completed the project, will graduate from a program of postsecondary education within 5 years.

**Results:** During the 2006-2007 year, 139 (54.27) project participants that completed the program, or were scheduled to complete the program, succeeded in education beyond high school. Of the number, 5 were verified as having completed a program of postsecondary education during the 2006-2007 year.

3.3 The following assessment activities were performed during the 2006-2007 year: The Annual Performance Report was completed prior to the November 30, 2006 deadline to the U.S. Department of Education.

3.4 During July 2007, the Upward Bound Program also underwent an internal audit the Office of Fiscal Affairs. The results of the audit yielded no exceptions to the operational procedures of the program.

4. **Planning**

4.1 All strategic program planning will align with the four standardized objectives stated in the funded grant proposal approved by the U.S. Department of Education. The plan to implement these objectives can be found in the Plan of Operation section of the funded proposal. A copy of the Plan of Operation is on file in the Office of Grants and Research.

4.2 The Upward Bound Program will strive to achieve the following outcome objectives during 2007-2008 year. These objectives align with Pathways in assisting program participants in excelling in education as whole persons.

- 60% of UB participants, who at the time of entrance into the project had an expected high school graduation date during the school year will have achieved at the proficient level during high school on state assessment in reading/language arts and math.

- 75% of 9th, 10th, and 11th grade project participants served during each school year will continue to participate in the Upward Bound Project during the next year.

- 60% of all UB participants, who at the time of entrance into the project had an expected graduation date during the school year, will enroll in a program of postsecondary education by the fall term immediately following the expected graduation date from high school.

- 65% of all UB participants who enroll in a program of postsecondary education during the fall term immediately following high school graduation will be enrolled for the fall term of the second academic year.
4.3 The Upward Bound Program will require assistance from key university personnel to achieve its stated objectives. Additionally, access to university classrooms, library, and university technology will enable the program to achieve success in reaching each objective.

4.4 The Upward Bound Program will adhere to the Evaluation Plan as stated in the 2007-2012 grant proposal approved by the U.S. Department of Education. A copy of the Evaluation Plan is on file in the Office of Grants and Research.

5. Budget

5.1 The 2006-2007 operating budget for the Upward Bound Program was $418,992.

5.1.1 The Program was able to operate within the scope of the budget following all legislation and regulations set by the U.S. Department of Education and federal law. The budget was adequate for effective program operations.

5.2 During the 2007 grant competition, an operating budget of $431,562 was requested. The request was approved by the U.S. Department of Education.

5.2.1 The increased budget will allow for program growth and will sustain program operations. The program will not need university funds to help sustain operations during the August 1, 2007 – July 31, 2008 fiscal year.

6. Resources Needs/Wants/Reallocation for FY08-09 through FY12-13

6.1 The need for personnel will be governed by the funded proposal through May 31, 2012. The Upward Bound Program will operate within the budget constraints and regulations as set by the funding agency.

6.1.1 The Upward Bound Program has an adequate pool of full-time and part-time personnel per grant award specifications.

6.1.2 Priority of positions will be determined by the specifications of the grant award.

6.2 Facility improvements are an allowable cost under federal regulations. If University funds are available, new carpet is needed in both the Upward Bound administrative offices (MO259) and the Upward Bound classroom/lab (MO262).

6.2.1 The Upward Bound Program will need classroom space for nine classes and office space in Monroe Hall to house each component of the program. The administration of the program will adhere to the Plan of Operations and Applicant and Community Support sections of the funded proposal.
6.3.1 The Upward Bound Program will require IT support and professional development as stipulated in the funded grant. A copy of the University’s commitment to the Upward Bound Program can be found in the Applicant and Community Support section of the funded application. A copy of the Applicant and Community Support section is on file in the Office of Grants and Research.

6.3.2 The program will operate within the budget outlined in the funded proposal. There will not be a need to reduce nor reallocate the operating budget. The program will not engage in generating additional revenue.

6.4 The program will not reduce, reallocate or generate additional funds for program operations.

6.4.1 This section is not applicable to the program.

6.4.2 This section is not applicable to the program.

7. Summary of Achievements

7.1 The unit as a whole was able to achieve two major goals for the 2006 year. The program was able to serve 85 students which exceeded the program requirements of 83. Also, the program was re-funded during the 2006 grant competition with a 4% increase to the overall operating budget. Both were major accomplishments for the program staff.

7.2 None noted

7.3 Veronica E. Carter and CJ Brumfield successful wrote a proposal for continued funding of the Loyola University New Orleans Upward Bound Program. Veronica Carter and CJ Brumfield chaired committees for the state conference of the Louisiana Association of Student Assistance Program in April, 2006. The conference was held in Alexandria, Louisiana. Ms. Carter chaired the Moderators committee and the CEU committee. Mr. Brumfield chaired the charity golf tournament for the Association.

7.4 Several May 07 high school graduates received scholarships for the 2007 fall semester. 84 of the 85 participants progressed to the next grade level.