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. The continued use of classrooms in Monroe Hall and other university resources (IT support, science labs, residence halls, and the assistance of key university personnel) are key to the success of the program.

1.7 Summary of achievements
The program administration worked to solidify its partnership with the counselors and principals at each of the four target schools. Also, program administration has established a relationship with key Jefferson Parish school board personnel.
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 10 part-time staff which included student workers, student assistants, program counselor, 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.

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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 2007-2008 along with information regarding the attainment of program objectives.

3.2 During the 2007 reporting period, the Upward Bound Program operated under the following standardized objectives as approved by the U.S. Department of Education:

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.
Results: During the reporting year, there were 16 Upward Bound seniors. Of that number 15 participants were tested during their 10th grade year. 93% or 14 out of the 15 tested passed both the reading/language arts and math portions of the Louisiana GEE 21 test.

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.

Results: Data is unavailable at this time.

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.

Results: Data is unavailable at this time.

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.

Results: Data is unavailable at this time.

3.3 During the 2007-2008 year, the Upward Bound Program was evaluated by an external evaluator to gauge effectiveness. Mr. Brad Petitfils served as the external evaluator. Overall, he concluded that the Upward Bound program had made a marked improvement in overall grade point averages, as well as an increase in standardized test scores for a majority of program participants. During July 2007, the Upward Bound Program also underwent an internal audit through the Office of Fiscal Affairs. The results of the audit yielded no exceptions to the operational procedures of the program.

3.4 The external environment which affects the program would be the relationship with the principals and counselors at each of the target schools. During the 07-08 year, the program established a collaborative relationship with the counselors and principals at 3 of the 4 target schools. The program also established partnerships with the Assistant Superintendent for Secondary, Post Secondary, and Community Education and the Instructional Programs and Guidance Counseling Consultant.

Internally, the Upward Bound Program has significant university support. Several departments, such as Biology and Chemistry and the Office of Financial Aid and Scholarships, have taken an active role in supporting program service delivery. Specifically, Ms. Cathy Simoneaux, Director of the Office of Financial Aid and Scholarships, has committed her time and the resources of her office to program participants and parents.
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 four (4) nationally standardized objectives during 2008-2009 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, university technology, and other university resources 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 2007-2008 operating budget for the Upward Bound Program was $431,562. The program also has an 8 account with an 07-08 balance that totaled $588.80.
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 The 08-09 budget for salaries and operating expenses totals $431,562.

5.2.1 The current budget will be adequate for FY08-09.

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 unallowable program 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 The Upward Bound staff will attend TRIO related trainings for professional development. The staff will also attend professional association conferences for additional professional development.

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 Upward Bound Program will continue to need the support of the University IT staff, use of multimedia equipment through the Multimedia Department, and any professional development offered by the university.

6.4 The program will not reduce, reallocate or generate additional funds for program operations.
6.4.1 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.

6.4.2 This section is not applicable to the program.

7. **Summary of Achievements**

7.1 The unit achieved a major goal of forming a more cohesive partnership with the administrations at each target school and key school board personnel. Several initiatives have resulted from the strides achieved in 07-08.

7.2 None noted

7.3 Veronica Carter served as the Logistics Chair for the Southwest Association of Student Assistance Program regional conference in November, 2007. The program staff hosted a very successful Counselor Meet and Greet for the counselors at the four (4) target schools. The program staff also attended several events at 3 of the 4 target schools.