

1/09

OVERVIEW:

PATRICK

TAYLOR

FOUNDA-

TION

September 30, 2008

Mr. Dan Bockhorst, Borough Manager
Ketchikan Gateway Borough
144 Front Street
Ketchikan, AK 99901

Dear Mr. Bockhorst:

This is in response to your July 8 letter to Governor Palin regarding restoring public trust in government as it relates to state assistance to local governments. I appreciate the thorough and comprehensive documentation of laws creating borough governments, challenges that have come from the current structure and also providing options for relief. Please accept my apology for the delay in responding.

The Governor has asked the departments of Law; Commerce, Community, and Economic Development; and Education and Early Development to review your material. As you know, significant work has been done over the past year to address education funding and work is continuing that may address some of the challenges you highlight in your letter. You also raise important questions regarding Title 29 of Alaska Statutes. These are complex policy questions that will require careful analysis to ensure that any changes result in a system that is in the best interests of all Alaskans.

We are working with state agencies to develop the budget and legislative package for consideration by the 26th Alaska State Legislature. We look forward to working with legislators and communities to address critical issues in Alaska.

Sincerely,



Lynne Smith
Special Staff Assistant

LS/JM/lc
Code: 0812 Tourism

H:/Correspondence/Commerce
CTS 8009 Dan Bockhorst



KETCHIKAN GATEWAY BOROUGH

344 FRONT STREET • KETCHIKAN, ALASKA 99901
• 907/228-6625 • fax 907/247-6625

OFFICE OF THE BOROUGH MANAGER

July 8, 2008

8:009
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LS lead
GOV

OFFICE OF THE GOVERNOR
HALLROOM
JUL 11 2008

The Honorable Sarah Palin
Governor
State of Alaska
P.O. Box 110001
Juneau, AK 99811-0001

RE: Restoring Public Trust in Government

Dear Governor Palin:

The Palin administration is closely identified with the issue of public trust. In fact, an internet search for the words "Governor Palin public trust" yields, amazingly, "about 316,000" results (see enclosure). The Ketchikan Gateway Borough commends you for your commitment to that important value.

The Ketchikan Gateway Borough respectfully invites you to consider the need to restore public trust in the context of keeping a crucial promise made by the State of Alaska to its citizens.

Forty-five years ago, the Alaska Legislature passed a bill mandating the creation of borough governments in Ketchikan and seven other regions of Alaska. At the time, the bill was considered by its sponsor, Representative John Rader, to be the most controversial bill ever passed by the Legislature. To defuse the contentious nature of that legislation (i.e., imposition of a form of local government having significant duties on selected Alaskans without the consent of those affected), the Alaska Legislature offered the following promise in Section 1 of the bill:

No area incorporated as an organized borough shall be deprived of state services, revenues, or assistance or be otherwise penalized because of incorporation.

The bill ultimately passed the Legislature by a narrow margin. As such, it can be stated with reasonable certainty that a veto by then-Governor William Egan would have ended the legislative mandate to incorporate boroughs. However, Governor Egan neither vetoed

the bill nor simply allowed it to become law without his signature. Instead, he embraced the action of the Legislature and signed the bill into law as Chapter 52, SLA 1963.

By signing the bill, Governor Egan joined the Alaska State Legislature in promising that organized boroughs would not be deprived of state services, revenues, or assistance, and that boroughs would not be otherwise penalized by the State of Alaska.

Regrettably, the 1963 promise by the legislative and executive branches of the State of Alaska was breached in a serious manner more than two decades ago. The greatest impact is felt with respect to funding for public education – a constitutional duty of the State of Alaska that has been delegated to borough governments in those parts of Alaska where boroughs exist.

In the current fiscal year alone, the Ketchikan Gateway Borough will be deprived of nearly \$9.5 million in State funding for schools compared to what it would receive had the 1963 promise been upheld. Other mandates applied to the Ketchikan Gateway Borough will add nearly \$2.3 million in additional burdens during the current fiscal year (see enclosure for details). For a community of 13,160 residents, the fiscal impact of the penalties and unfunded mandates is enormous.

When the legislative and executive branches of State government failed to honor the 1963 promise in relation to education funding, the Matanuska-Susitna Borough and its citizens turned for relief during the mid-1980s to the third branch of State government – the Alaska Court System.

Following an 11-year appeal initiated in 1986, the Alaska Supreme Court denied a petition for justice in terms of unequal treatment of borough governments and taxpayers by the State of Alaska. In rejecting the appeal, the Court stressed that “[b]oroughs are not entitled to equal protection under the Alaska Constitution” because “[t]he purpose of the Alaska due process and equal protection clauses is to protect people from abuses of government, not to protect political subdivisions of the state from the actions of other units of state government.”¹

With respect to borough taxpayers, the Court concluded in the same case that, “any disparate impact on taxpayers . . . does not rise to the level of an equal protection violation.”

¹ *Matanuska-Susitna Borough School Dist. v. State*, 931 P.2d 391, FN2 (Alaska 1997).

Many elected State officials today appear to be either unaware of or unmoved by the breach of the promise made by their predecessors 45 years ago. The 1963 promise has been dismissed by some on the basis that it was "merely a statement of intent" rather than a binding obligation on the part of the State of Alaska. Others have pointed out that even if it were an obligation of the State at the time the law was passed, the 1963 Legislature could not legally bind future legislatures. Still others seem to be willing to accept the status quo simply because the promise has not been honored for such an extended period of time. As noted above, the Alaska Supreme Court dismissed the concerns by concluding that our Constitution does not protect boroughs from abuse by the State and that any disparate treatment of taxpayers is not serious enough to warrant intervention. While any of those arguments may be technically accurate, they certainly do not absolve the legislative and executive branches of government from the moral obligation expressed in 1963.

The effect of the breach of public trust has been chilling in terms of the achieving the constitutional goal of borough formation. On the eve of the 50th anniversary of statehood and 45 years after the Mandatory Borough Act, more than half the geographic area of Alaska remains outside organized boroughs.

Study after study in the post-mandatory-borough era has indicated that the biggest deterrent to voluntary formation of boroughs is the financial penalties that result. The late Jay Hammond expressed the matter well when he stated:

Attractive enough on paper, in practice, the organized borough concept had little appeal to most communities. After all, why should they tax themselves to pay for services received from the state, gratis?²

Less than one year ago, residents in the Deltana region of interior Alaska were among the latest to prove the validity of Governor's Hammond's candid observation. Although the Deltana region has fiscal resources that would be the envy of the Ketchikan Gateway Borough and most every other organized borough, Deltana area voters rejected, by a margin of more than nine to one, a proposal initiated by local voters to incorporate a borough. The following sentiments expressed on the record by one Deltana citizen are apparently shared by many in the region:³

² *Tales of Alaska's Bush Rat Governor*, page 149.

³ *Final Report to the Local Boundary Commission Regarding the Deltana Borough Proposal*, page 33.

The people here did not promise to pay for the educational system that we currently have. The State has paid for most of that. I think it's great that we have it. We could pay a head tax. There are different ways to take care of the necessities that we have as a community other than having a borough. A borough is not the answer to taking care of the community's needs. It might be the State's answer. With a borough, you have borough taxes. I don't want to be that stupid.

Those areas of the state that were compelled by the legislative and executive branches to organize boroughs have, of course, suffered huge fiscal impacts because the 1963 promise was not upheld. With the fiscal burden imposed by the State, the Ketchikan Gateway Borough and many other borough governments in Alaska are hard pressed today to fund needed facilities and services. In stark contrast, the State Treasury is bulging.

Relief could take different forms, including any of the following three options:

1. Repeal laws that provide for disparate education funding for boroughs. AS 14.17.410(b)(2) reduces the level of State education aid to the Ketchikan Gateway Borough by more than \$5 million annually.⁴ Additionally, AS 14.11.008 requires the Ketchikan Gateway Borough to pay 30 percent of major maintenance costs for schools while unorganized areas are required to pay only 2 percent. Moreover, AS 14.11.100 requires the Borough to pay 30 percent of debt service for school construction. School construction in unorganized areas is fully funded by the State.
2. As an alternative to permanently repealing the disparate-funding laws, the Legislature could appropriate funds to compensate boroughs for inequitable funding during times when the State enjoys large-scale surplus revenues as it does today.
3. When evaluating State capital funding requests and appropriations, take into consideration the impact on boroughs that has resulted from the failure to uphold the 1963 promise. In other words, recognize that boroughs would be far better able to fund capital projects in their communities through local appropriations if they were not obligated to close the fiscal gap resulting from the breach of the 1963 promise for equitable funding for boroughs.

⁴ From 1969 to 1986, the State fully funded each district's basic need (see *Public School Financing in Alaska*, pages 5 and 9, House Research Agency, February 1987). However, when State revenues dropped precipitously in the mid-1980s, the State reduced education aid to boroughs by an amount equal to a 4-mill tax levy or 35 percent of basic need (increased later to 45 percent of basic need), whichever was less.

The Honorable Sarah Palin

July 8, 2008

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Your leadership in addressing this matter would be most welcome. The citizens of the Ketchikan Gateway Borough look forward to your consideration of the concerns raised here. We hope you will share your thoughts concerning this matter.

Respectfully,



Dan Bockhorst
Borough Manager

Enclosures:

- Page showing results of Google™ search for "Governor Palin public trust"
- Details of \$9.5 million penalty regarding FY 2009 State education funding for the Ketchikan Gateway Borough

Summary of Penalties Imposed on the Ketchikan Gateway Borough Regarding Fiscal Year 2009 Funding by the State of Alaska

1. State Funding for Operation of Schools

Education is a fundamental responsibility of the State of Alaska as reflected in Article VII, Section 1 of the Constitution of the State of Alaska, which provides that the State must "establish and maintain a system of public schools."

State law (AS 29.35.160) mandates that the Ketchikan Gateway Borough provide public education on an areawide basis. Moreover, State law (AS 14.17.410(b)(2)) mandates that the Ketchikan Gateway Borough pay a significant portion of the cost of education that would otherwise be borne by the State of Alaska. The requirement in AS 14.17.410(b)(2) is imposed only on organized boroughs and home rule and first class cities in the unorganized borough. Nineteen of the fifty-three school districts in Alaska (35.8 percent) are not subject to the requirement.

In the current fiscal year, the penalty in terms of State funding for operation of schools within the Ketchikan Gateway Borough will amount to \$5,003,574.

2. Major Maintenance Grants for Schools

State law (AS 14.11.008) mandates that the Ketchikan Gateway Borough pay 30 percent of the cost of major maintenance grant projects for its schools. Here again, the nineteen regional school districts in the unorganized borough are treated differently. Those districts are required to contribute only 2 percent of the cost. The contribution required of the Ketchikan Gateway Borough is 15 times greater.

In the upcoming fiscal year, the Ketchikan Gateway Borough will be mandated to pay \$2,885,810 for two major maintenance projects; while the State will pay \$6,733,557. If Ketchikan received education services from a regional educational attendance area, the required local payment would be only \$192,387, while the State payment would be \$9,426,979. Thus, the penalty in this case amounts to \$2,693,422 for FY 2009.

3. School Construction Debt

State law (AS 14.11.100) mandates that the Ketchikan Gateway Borough pay 30 percent of the costs of school construction debt. In the current year, that local share is projected to

be \$1,794,578. In contrast to municipal school districts, no local contribution is required for construction of new schools in regional school districts in the unorganized borough.

4. Property Tax Exemptions

State law mandates a number of exemptions with respect to property taxes levied by local governments. For example, AS 29.45.030(e) mandates that the Ketchikan Gateway Borough exempt from taxation the first \$150,000 of the assessed value of real property owned and occupied as the primary residence and permanent place of abode by a resident 65 years of age or older; a disabled veteran; or a resident at least 60 years old who is the widow or widower of a person who qualified for an exemption. At one point, the State substantially reimbursed local governments for the fiscal impact of that mandate. However, no reimbursement is currently offered. The fiscal impact to the Ketchikan Gateway Borough of the mandate in AS 29.45.030(e) is projected to be approximately \$635,000 in the current fiscal year.

5. Assessment and Collection of Taxes

State law (AS 29.35.170) mandates that the Ketchikan Gateway Borough assess and collect property, sales, and use taxes that are levied in its boundaries, subject to AS 29.45. In the current fiscal year, \$607,175 has been appropriated to carry out property assessment functions in the Ketchikan Gateway Borough. That cost is separate from the expense of collecting property, sales, and other taxes. The cost of collection, while not identified as a discrete component of the Finance Department, is estimated to be in excess of \$300,000 annually.

6. Planning, Platting, and Land Use Regulation

State law (AS 29.35.180) mandates that the Ketchikan Gateway Borough provide for planning, platting, and land use regulation in accordance with AS 29.40. In the current fiscal year, \$743,063 has been appropriated to carry out planning, platting, and land use regulation in the Ketchikan Gateway Borough.

Summary of Penalties in Terms of FY 2009 State Funding for the Ketchikan Gateway Borough	
Mandate	Penalty
Mandatory contribution for schools (does not include \$3,030,000 voluntary contribution)	\$5,003,574
Disparity in funding for major maintenance for schools (figure may vary sharply from year to year)	\$2,693,422
School construction debt	\$1,794,578
Property tax exemptions	\$635,000
Assessment and collection of taxes	\$907,175
Planning, platting, and land use regulation	\$743,063
Total	\$11,776,812

Public School Funding Program Overview

Updated January 2009



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STUDENT BASED FORMULA**District Adjusted Average Daily Membership (ADM)**

- Step 1. Adjust: ADM for School Size
 Step 2. Apply: District Cost Factor
 Step 3. Apply: Special Needs Factor
 Step 4. Add: Intensive Services Count
 Step 5. Add: Correspondence Student Counts
 = District Adjusted (ADM)

ADM Reporting Requirements

ADM – is the average number of enrolled students during the 20-school day count period. The 20-school day count ends the fourth Friday of October.
 Reports are due within two weeks after the end of the 20-school day count period.

School Size Adjustment [Step 1]

For each school in the district subtract from the ADM all correspondence counts. Adjust the remaining ADM of each school using the school size factor table.

1. A community with an ADM under 10:
 Added to the smallest school with an ADM greater than 10.
2. A community with an ADM from 10 - 100:
 Grades K-12 ADM combined and adjusted once, adjusted as one school.
3. A community with an ADM from 101 – 425:
 ADM for grades K-6 and 7-12 are adjusted separately; adjusted as two schools.
4. A community with an ADM greater than 425:
 - Each facility administered as one school, counted as one school, ADM is adjusted as one school.
 - Alternative schools with an ADM of less than 200 combined are adjusted with the school with the greatest ADM in the district.
 - If an alternative school ADM is greater than 200 and administered as a separate facility, the ADM will be adjusted separately.
 - A Charter school with an ADM of 150 or greater will be adjusted as separate facility.

Using the proper formula from the school size factor table, calculate the adjusted ADM for each school.

School Size Table

Reference:	School Size:	Formula:
1.	10-19.99	39.60
2.	20-29.99	$39.60 + (1.62 * (ADM - 20))$
3.	30-74.99	$55.80 + (1.49 * (ADM - 30))$
4.	75-149.99	$122.85 + (1.27 * (ADM - 75))$
5.	150-249.99	$218.10 + (1.08 * (ADM - 150))$
6.	250-399.99	$326.10 + (.97 * (ADM - 250))$
7.	400-749.99	$471.60 + (.92 * (ADM - 400))$
8.	Over 750	$793.60 + (.84 * (ADM - 750))$

Correspondence student counts are not adjusted for size.

Hold Harmless [Step 1a]

House Bill 273 established a Hold Harmless [HH] provision for those districts experiencing a reduction in enrollment. To determine eligibility for this provision the district's sum total of the adjustment for school size is compared against the prior fiscal year [FY] to see if a decrease of five percent or greater has occurred. The HH provision is available to eligible districts for up to three years provided the total school size adjustment continues to stay below the base year. The district uses the fiscal year before the decrease as a base fiscal year to offset the decrease, according to the following method:

- ◆ 75% of the school size adjustment difference between the current FY and the base FY.
- ◆ 50% of the school size adjustment difference between the second FY and the base FY.
- ◆ 25% of the school size adjustment difference between the third FY and the base FY.

District Cost Factors [Step 2]

- Cost factors are specific to each school district.
- With the implementation of ISER in HB273, District cost factors will range from 1.000 to 1.948. [FY09 = 50% ISER with 12.5% added each subsequent year for next four years.]
- The department monitors the district cost factors and submits a report to the legislature on January 15 every other fiscal year, beginning in FY01.

The districts school size adjusted ADM is multiplied by the district cost factor.

Special Needs Funding [Step 3]

Vocational education, special education (except intensive special education), gifted/talented education, and bilingual/bicultural education are block funded. A district must file a plan with the department indicating the special needs services that will be provided, Section 14.17.420(2)(b), to qualify for special needs funding.

The districts' previously adjusted ADM is now multiplied by the Special Needs factor of 1.20.

Intensive Services Funding [Step 4]

A school district receives funding for intensive special education students that:

- Are receiving intensive services, and;
- Are enrolled on the last day of the 20 school day count period, and;
- Have an established Individual Education Plan (IEP).
- The districts intensive student count is multiplied by 11. [FY09 is multiplied by nine]

The district's Intensive count is added to previously adjusted ADM.

Correspondence Programs [Step 5]

Funding for correspondence programs is calculated by multiplying the correspondence ADM by 80%.

The district's correspondence count is now added to the previously adjusted ADM to arrive at the Final Adjusted ADM.

Basic Need

Multiply the district Final Adjusted ADM by the Base Student Allocation [BSA] to determine Basic Need. The BSA is \$5,580 for FY10. [FY09 BSA is \$5,480]

PUBLIC SCHOOL FUNDING ELEMENTS

The components of Public School Funding are *State Aid, Required Local Contribution, and Title VIII Impact Aid.*

State Aid Entitlement

Basic Need minus a required local contribution minus 90% eligible Federal Impact Aid plus the amount of funding 'Floor' plus Quality School Grants equal State Aid Entitlement.

Required Local Contribution

The equivalent of a 4-mill tax levy on the Full and True Value of the taxable real and personal property in the district not to exceed 45% of the district's Basic Need for the preceding fiscal year. *However*, beginning in FY02, only 50% of the *increase* in real and personal property over the 1999 Full and True Value is used for the 4 mill equivalent calculation. If the latest Full and True Value doesn't exceed the 1999 Full and True Value, then the latest value is utilized.

Title VIII Impact Aid

Federal Impact Aid provides funds to school districts for children of parents living and/or working on federal property "in-lieu of local tax revenues." 90% of the eligible funds are used in the calculation of state aid.

ADDITIONAL FUNDS ABOVE BASIC NEED

Maximum Local Contribution

If the City or Borough would like to contribute more than Required then the Maximum Local Contribution applies. To calculate this use the Required Local Contribution plus 23% of Basic Need or a 2-mill equivalent of the Full and True Value of the taxable and real property within the district, whichever is *greater*. The additional amount is added to the Required Local Effort to reach the Maximum Local Contribution.

For Example:

Nome's: *23% of Basic Need* = \$2,096,229 OR

.002 of Full & True Value = \$571,848

RESULT:

Required Local Effort: \$ 955,700

Additional Local Contribution: +\$2,096,229 [*23% of Basic Need*]

Maximum Local Contribution: \$3,051,929

Quality School Grants

The districts adjusted ADM multiplied by \$16 generates the amount the school district is eligible to receive.

Example: Nome School District

Column

I. Basic Need Calculation

Projected ADM 676.50 L

Determining School Size Adjustment

[Utilizing Table from page 4]

Nome Elementary School ADM 355

Anvil City Science Academy + 44 [Anvil (Alt.) School is adjusted with Greatest ADM see pg. 3]

399

Nome/Beltz Jr. & Senior High = 255

Nome Youth Facility = 14

$326.10 + (.97 \times (399 - 250)) = 470.63$
$326.10 + (.97 \times (255 - 250)) = 330.95$
14 = 39.60

FY10 School Size adjusted ADM **841.18**

Less FY09 School Size adjusted ADM 965.08

loss in School Size adjustment over PY (123.90)

Hold Harmless Provision:

Determine 5% eligibility

Divide difference by the base FY09 $123.90 / 965.08 = 12.84\%$ [eligible]

75% of difference added back to FY10 School Size 841.18

$123.90 \times 75\% = 92.93$ + 92.93

New Adjusted ADM-School Size 934.11 O

Apply District Cost Factor x 1.402

1,309.62 Q

Apply Special Needs Factor x 1.20

1,571.54 R

Add Intensive Service Counts 55.00 T

$(5 \times 11) = 55.00$

1,626.54 U

Add Correspondence Counts 6.80 V

$(8.5 * .80) = 6.80$

District Adjusted ADM 1,633.34 W

Multiply by \$5,580 base allocation x \$5,580.00

Basic Need: \$ 9,114,037 B

II. Nome's State Aid

Basic Need \$9,114,037 B

Required Local Contribution (955,700) C

Impact Aid (36,967) F

State Aid \$8,121,370 G

III. Quality Schools Grant

District adjusted ADM x \$16 1,633.34

x \$16.00

\$26,133 I

IV. Components of State Aid

State Aid \$8,121,370 G

Quality Schools Grant 26,133 I

Total State Aid Entitlement \$8,147,503 J

Alaska Department of Education & Early Development

January 2009 Updated

FY2010 Projections

Department of Education & Early Development
Foundation

I	School District	L-M		OxP		OxL20	Sx5	R-T	Mx80	L-V				
		K	L	M	N	O	P	Q	R	S	T	U	V	W
		PROJECTED FY10 ADM	PROJECTED FY10 ADM	PROJECTED FY10 ADM	PROJECTED FY10 ADM	Adj for School Size ADM: HH included where elig.	District Cost Factor	Adjusted for Cost Factor	Special Needs Factor 1.20	Special Ed Intsv.	Adjust for SPED Intsv *11.00	Students - Intensive Special Education	District Corresp. 80%	District Adjusted ADM
2	Alaska Gateway	343.00	58.00	401.00	599.58	1.481	887.98	1065.58	5	55	1120.58	46.40	1166.98	
3	Aleutian Region	37.00	0.00	37.00	118.80	1.864	221.44	265.73	0	0	265.73	0.00	265.73	
4	Aleutians East	256.00	0.00	256.00	515.70	1.778	916.91	1100.29	1	11	1111.29	0.00	1111.29	
5	Anchorage	47464.25	896.00	48360.25	52164.21	1.000	52164.21	62597.05	809	8899	71496.05	716.80	72212.85	
6	Annette Island	268.00	0.00	268.00	395.56	1.216	481.00	577.20	1	11	588.20	0.00	588.20	
7	Bering Strait	1653.00	0.00	1653.00	2672.56	1.821	4866.73	5840.08	19	209	6049.08	0.00	6049.08	
8	Bristol Bay	140.00	2.00	142.00	261.98	1.397	365.99	439.19	2	22	461.19	1.60	462.79	
9	Chatham	154.00	3.00	157.00	289.53	1.405	406.79	488.15	3	33	521.15	2.40	523.55	
10	Chugach	70.00	170.00	240.00	144.85	1.420	205.69	246.83	0	0	246.83	136.00	382.83	
11	Copper River	454.25	50.25	504.50	788.28	1.264	996.39	1195.67	4	44	1239.67	40.20	1279.87	
12	Cordova	365.00	0.00	365.00	529.08	1.182	625.37	750.44	8	88	838.44	0.00	838.44	
13	Craig	332.00	394.67	726.67	469.62	1.133	532.08	638.50	7	77	715.50	315.74	1031.24	
14	Delta/Greely	785.00	300.00	1085.00	1080.75	1.191	1287.17	1544.60	11	121	1665.60	240.00	1905.60	
15	Denali	234.00	175.00	409.00	409.32	1.326	542.76	651.31	1	11	662.31	140.00	802.31	
16	Dillingham	508.00	6.00	514.00	659.74	1.312	865.58	1038.70	7	77	1115.70	4.80	1120.50	
17	Fairbanks	14075.00	293.00	14368.00	15938.04	1.059	16878.38	20254.06	303	3333	23587.06	234.40	23821.46	
18	Galena	234.00	3400.00	3634.00	345.34	1.376	475.19	570.23	0	0	570.23	2720.00	3290.23	
19	Haines	261.00	15.00	276.00	437.70	1.128	493.73	592.48	6	66	658.48	12.00	670.48	
20	Hoonah	115.00	0.00	115.00	205.77	1.270	261.33	313.60	4	44	357.60	0.00	357.60	
21	Hydaburg	60.00	0.00	60.00	118.22	1.348	159.36	191.23	0	0	191.23	0.00	191.23	
22	Iditarod Area	193.00	100.00	293.00	394.34	1.705	672.35	806.82	0	0	806.82	80.00	886.82	
23	Juneau	4840.00	81.00	4921.00	5476.37	1.093	5985.67	7182.80	130	1430	8612.80	64.80	8677.60	
24	Kake	95.00	0.00	95.00	160.81	1.296	208.41	250.09	3	33	283.09	0.00	283.09	
25	Kashunamiut	318.00	0.00	318.00	454.69	1.533	697.04	836.45	4	44	880.45	0.00	880.45	
26	Kenai Peninsula	8112.00	935.00	9047.00	10389.02	1.109	11521.42	13825.70	77	847	14672.70	748.00	15420.70	
27	Ketchikan Gateway	2060.00	35.00	2095.00	2706.32	1.106	2993.19	3591.83	20	220	3811.83	28.00	3839.83	
28	Klawock	119.10	0.00	119.10	216.31	1.196	258.71	310.45	3	33	343.45	0.00	343.45	
29	Kodiak Island	2535.00	80.00	2615.00	3120.29	1.216	3794.27	4553.12	23	253	4806.12	64.00	4870.12	
30	Kuspuk	326.00	0.00	326.00	679.97	1.622	1102.91	1323.49	3	33	1356.49	0.00	1356.49	
31	Lake & Peninsula	364.00	0.00	364.00	750.30	1.831	1373.80	1648.56	2	22	1670.56	0.00	1670.56	
32	Lower Kuskokwim	3948.00	0.00	3948.00	5852.79	1.599	9358.61	11230.33	62	682	11912.33	0.00	11912.33	
33	Lower Yukon	2038.80	0.00	2038.80	3093.87	1.703	5268.86	6322.63	13	143	6465.63	0.00	6465.63	
34	Mat-Su	15079.00	1485.00	16564.00	17229.33	1.048	18056.34	21667.61	270	2970	24637.61	1188.00	25825.61	
35	Nenana	187.00	800.00	987.00	317.88	1.313	417.38	500.86	2	22	522.86	640.00	1162.86	
36	Nome	668.00	8.50	676.50	934.11	1.402	1309.62	1571.54	5	55	1626.54	6.80	1633.34	
37	North Slope	1571.00	0.00	1571.00	2191.14	1.684	3689.88	4427.86	10	110	4537.86	0.00	4537.86	
38	Northwest Arctic	1854.00	0.00	1854.00	2705.43	1.720	4653.34	5584.01	21	231	5815.01	0.00	5815.01	
39	Pelican	16.00	0.00	16.00	39.60	1.408	55.76	66.91	0	0	66.91	0.00	66.91	
40	Petersburg	510.00	0.00	510.00	745.61	1.153	859.69	1031.63	10	110	1141.63	0.00	1141.63	
41	Pribilof	106.00	0.00	106.00	176.77	1.589	280.89	337.07	0	0	337.07	0.00	337.07	
42	Saml Marv's	180.00	0.00	180.00	283.80	1.522	431.94	518.33	1	11	529.33	0.00	529.33	
43	Sitka	1268.00	35.00	1303.00	1556.19	1.123	1747.60	2097.12	32	352	2449.12	28.00	2477.12	
44	Skagway	95.00	0.00	95.00	164.12	1.163	190.87	229.04	3	33	262.04	0.00	262.04	
45	Southeast Island	167.00	1.00	168.00	479.25	1.299	622.55	747.06	3	33	780.06	0.80	780.86	
46	Southwest Region	633.50	0.00	633.50	1064.45	1.587	1689.28	2027.14	6	66	2093.14	0.00	2093.14	
47	Tanana	40.00	0.00	40.00	89.70	1.677	150.43	180.52	1	11	191.52	0.00	191.52	
48	Unalaska	410.00	0.00	410.00	555.00	1.368	759.24	911.09	2	22	933.09	0.00	933.09	
49	Valdez	682.00	0.00	682.00	886.29	1.143	1013.03	1215.64	8	88	1303.64	0.00	1303.64	
50	Wrangell	305.00	4.00	309.00	469.43	1.100	516.37	619.64	5	55	674.64	3.20	677.84	
51	Yakutat	101.00	0.00	101.00	188.23	1.275	239.99	287.99	0	0	287.99	0.00	287.99	
52	Yukon Flats	270.80	0.00	270.80	535.63	1.948	1043.41	1252.09	3	33	1285.09	0.00	1285.09	
53	Yukon/Kovukuk	274.00	975.00	1249.00	578.97	1.711	990.62	1188.74	8	88	1276.74	780.00	2056.74	
54	Yupik	450.00	0.00	450.00	766.34	1.628	1247.60	1497.12	2	22	1519.12	0.00	1519.12	
55	St. Edgecumbe	430.00	0.00	430.00	499.20	1.123	560.60	672.72	0	0	672.72	0.00	672.72	
56														
57	TOTALS	118,054.70	10,302.42	128,357.12	143,896.18	0.000	167,395.75	200,874.92	1,925	21,153	222,027.92	8,241.94	230,269.86	

Alaska Department of Education & Early Development

January 2009 Updated
 FY2010 Projections
 Department of Education & Early Development
 Foundation

	A	B	C	D	E	F	G	H	I	J
		55,580 Basic	Required Local	Eligible Federal	Impact AID	Deductible		FY2010	Quality	FY10
1	School District	Need	Effort	Impact AID	Percent	Impact AID	State AID	PROJECTED	Schools	PROJECTED Total
						90.0%		Adjusted Floor	State Entitlement	
2	Alaska Gateway	6,511,748	0	312,928	100.00%	281,635	6,230,113	0	18,672	6,248,785
3	Aleutian Region	1,482,773	0	94,083	100.00%	84,675	1,398,098	0	4,252	1,402,350
4	Aleutians East	6,200,998	450,128	718,486	35.72%	230,979	5,519,891	0	17,781	5,537,672
5	Anchorage	402,947,703	101,145,807	12,567,783	54.69%	6,185,988	295,615,908	0	1,155,406	296,771,314
6	Annette Island	3,282,156	0	1,488,698	100.00%	1,339,828	1,942,328	0	9,411	1,951,739
7	Bering Strait	33,753,866	0	8,818,685	100.00%	7,936,817	25,817,049	0	96,785	25,913,834
8	Bristol Bay	2,582,368	806,424	174,176	75.05%	117,647	1,658,297	0	7,405	1,665,702
9	Chatham	2,921,409	0	336,084	100.00%	302,476	2,618,933	0	8,377	2,627,310
10	Chugach	2,136,191	0	129,604	100.00%	116,644	2,019,547	179,084	6,125	2,204,756
11	Copper River	7,141,675	0	167,392	100.00%	150,653	6,991,022	0	20,478	7,011,500
12	Cordova	4,678,495	755,869	35,117	45.40%	14,349	3,908,277	0	13,415	3,921,692
13	Craig	5,754,319	397,755	577,296	48.64%	252,717	5,103,847	0	16,500	5,120,347
14	Delta/Green	10,633,248	0	301,560	100.00%	271,404	10,361,844	0	30,490	10,392,334
15	Denali	4,476,890	702,934	11,428	40.20%	4,135	3,769,821	0	12,837	3,782,658
16	Dillingham	6,252,390	631,792	1,156,677	50.34%	524,044	5,096,554	0	17,928	5,114,482
17	Fairbanks	132,923,747	27,131,178	10,162,549	60.59%	5,541,740	100,250,829	0	381,143	100,631,972
18	Galena	18,359,483	95,616	84,142	9.84%	7,452	18,256,415	0	52,644	18,309,059
19	Haines	3,741,278	1,081,719	0	77.30%	0	2,659,559	0	10,728	2,670,287
20	Hoonah	1,995,408	139,041	308,360	50.56%	140,316	1,716,051	0	5,722	1,721,773
21	Hydaburg	1,067,063	34,396	321,616	28.69%	83,044	949,623	0	3,060	952,683
22	Iditarod Area	4,948,456	0	476,654	100.00%	428,989	4,519,467	0	14,189	4,533,656
23	Juneau	48,421,008	13,816,916	0	57.07%	0	34,604,092	0	138,842	34,742,934
24	Kake	1,579,642	77,607	253,479	26.52%	60,500	1,441,535	0	4,529	1,446,064
25	Kashunamiut	4,912,911	0	1,753,215	100.00%	1,577,894	3,335,017	0	14,087	3,349,104
26	Kenai Peninsula	86,047,506	23,192,450	0	56.04%	0	62,855,056	0	246,731	63,101,787
27	Ketchikan Gateway	21,426,251	5,259,305	0	57.82%	0	16,166,946	0	61,437	16,228,383
28	Klawock	1,916,451	137,801	554,479	41.66%	207,896	1,570,754	0	5,495	1,576,249
29	Kodiak Island	27,175,270	4,353,652	1,577,158	41.84%	593,895	22,227,723	0	77,922	22,305,645
30	Kuspuk	7,569,214	0	1,552,475	100.00%	1,397,228	6,171,986	0	21,704	6,193,690
31	Lake & Peninsula	9,321,725	279,808	1,398,727	18.09%	227,727	8,814,190	0	26,725	8,840,919
32	Lower Kuskokwim	66,470,801	0	13,802,820	100.00%	12,422,538	54,048,263	0	190,597	54,238,860
33	Lower Yukon	36,078,215	0	8,631,293	100.00%	7,768,164	28,310,051	0	103,450	28,413,501
34	Mat-Su	144,106,904	23,355,306	0	52.18%	0	120,751,598	0	413,210	121,164,808
35	Nenana	6,488,759	95,907	1,152	73.77%	765	6,392,087	0	18,606	6,410,693
36	Nome	9,114,037	955,700	81,920	50.14%	36,967	8,121,370	0	26,133	8,147,503
37	North Slope	25,321,259	11,158,305	4,406,637	41.87%	1,660,553	12,502,401	0	72,606	12,575,007
38	Northwest Arctic	32,447,756	2,105,556	4,542,792	32.79%	1,340,623	29,001,577	0	93,040	29,094,617
39	Pelican	373,358	46,270	0	93.12%	0	327,088	97,647	1,071	425,806
40	Petersburg	6,370,295	1,147,665	0	60.54%	0	5,222,630	0	18,266	5,240,896
41	Pribilof	1,880,851	0	596,489	100.00%	536,840	1,344,011	0	5,393	1,349,404
42	Saint Mary's	2,953,661	34,565	0	48.68%	0	2,919,096	0	8,469	2,927,565
43	Sitka	13,822,330	3,604,320	24,451	64.96%	14,295	10,203,715	0	39,634	10,243,349
44	Skagway	1,462,183	662,121	0	53.32%	0	800,062	0	4,193	804,255
45	Southeast Island	4,357,199	0	15,145	100.00%	13,631	4,343,568	0	12,494	4,356,062
46	Southwest Region	11,679,721	0	3,060,391	100.00%	2,754,352	8,925,369	0	33,490	8,958,859
47	Tanana	1,068,682	27,918	24,342	100.00%	21,908	1,018,836	0	3,064	1,021,920
48	Unalaska	5,206,642	1,674,958	13,160	58.70%	6,952	3,524,732	0	14,929	3,539,661
49	Valdez	7,274,311	3,254,652	3,881	51.05%	4,080	4,015,579	0	20,858	4,036,437
50	Wrangell	3,782,347	624,990	2,081	77.46%	1,451	3,155,906	0	10,845	3,166,751
51	Yakutat	1,606,984	231,990	200,311	45.71%	82,406	1,292,588	0	4,608	1,297,196
52	Yukon Flats	7,170,802	0	705,762	100.00%	635,186	6,535,616	0	20,561	6,556,177
53	Yukon-Koyukuk	11,476,609	0	1,196,353	100.00%	1,076,718	10,399,891	0	32,908	10,432,799
54	Yupik	8,476,690	0	2,417,205	100.00%	2,175,485	6,301,205	0	24,306	6,325,511
55	Mt. Edgecumbe	3,753,778	0	881,853	100.00%	793,668	2,960,110	0	10,764	2,970,874
56									Military/Other	26,027,300
57	TOTALS:	1,284,905,816	229,470,421	\$5,945,889		59,427,254	996,008,141	276,731	3,684,318	1,025,996,497

HB273 & Formula Changes

In addition to the hold harmless provision that was implemented, HB273, enacted in 2008, changed three other components of the formula over a period of five years.

Fiscal Year	District Cost Factor	Intensive Multiplier	Base Student Allocation
FY2009	50% of ISER	x 9	\$5,480
FY2010	62.5% of ISER	x 11	\$5,580
FY2011	75% of ISER	x 13	\$5,680
FY2012	87.5% of ISER		
FY2013	100% ISER		

Area Cost Differential Table FY09 FY10 FY11 FY12 FY13

District	Education Task Force District Cost Factors				
	50% ISER	62.50% ISER	75.0% ISER	87.50% ISER	100% ISER
Alaska Gateway	1.443	1.481	1.519	1.557	1.594
Aleutian Region	1.838	1.864	1.890	1.916	1.939
Aleutians East Borough	1.707	1.778	1.849	1.920	1.991
Anchorage	1.000	1.000	1.000	1.000	1.000
Annette Island	1.175	1.216	1.257	1.298	1.338
Bering Strait	1.762	1.821	1.880	1.939	1.998
Bristol Bay Borough	1.370	1.397	1.424	1.451	1.478
Chatham	1.348	1.405	1.462	1.519	1.576
Chugach	1.395	1.420	1.445	1.470	1.496
Copper River	1.246	1.264	1.282	1.300	1.316
Cordova	1.165	1.182	1.199	1.216	1.234
Craig	1.108	1.133	1.158	1.183	1.206
Delta/Greely	1.174	1.191	1.208	1.225	1.241
Denali Borough	1.323	1.326	1.329	1.332	1.332
Dillingham	1.300	1.312	1.324	1.336	1.346
Fairbanks North Star Borough	1.055	1.059	1.063	1.067	1.070
Galena	1.370	1.376	1.382	1.388	1.391
Haines Borough	1.104	1.128	1.152	1.176	1.200
Hoonah	1.227	1.270	1.313	1.356	1.399
Hvdaburg	1.295	1.348	1.401	1.454	1.504
Iditarod Area	1.658	1.705	1.752	1.799	1.846
Juneau Borough	1.075	1.093	1.111	1.129	1.145
Kake	1.242	1.296	1.350	1.404	1.459
Kashunamiut	1.504	1.533	1.562	1.591	1.619
Kenai Peninsula Borough	1.088	1.109	1.130	1.151	1.171
Ketchikan Gateway Borough	1.085	1.106	1.127	1.148	1.170
Klawock	1.160	1.196	1.232	1.268	1.302
Kodiak Island Borough	1.191	1.216	1.241	1.266	1.289
Kuspuk	1.584	1.622	1.660	1.698	1.734
Lake & Peninsula Borough	1.776	1.831	1.886	1.941	1.994
Lower Kuskokwim	1.577	1.599	1.621	1.643	1.665
Lower Yukon	1.650	1.703	1.756	1.809	1.861
Mat-Su Borough	1.040	1.048	1.056	1.064	1.070
Nenana	1.304	1.313	1.322	1.331	1.338
Nome	1.385	1.402	1.419	1.436	1.450
North Slope Borough	1.648	1.684	1.720	1.756	1.791
Northwest Arctic Borough	1.686	1.720	1.754	1.788	1.823
Pelican	1.384	1.408	1.432	1.456	1.477
Petersburg	1.122	1.153	1.184	1.215	1.244
Pribilof	1.555	1.589	1.623	1.657	1.691
Saint Mary's	1.488	1.522	1.556	1.590	1.624
Sitka Borough	1.098	1.123	1.148	1.173	1.195
Skagway	1.159	1.163	1.167	1.171	1.174
Southeast Island	1.264	1.299	1.334	1.369	1.403
Southwest Region	1.554	1.587	1.620	1.653	1.685
Tanana	1.641	1.677	1.713	1.749	1.786
Unalaska	1.343	1.368	1.393	1.418	1.441
Valdez	1.133	1.143	1.153	1.163	1.170
Wrangell	1.080	1.100	1.120	1.140	1.159
Yakutat	1.229	1.275	1.321	1.367	1.412
Yukon Flats	1.892	1.948	2.004	2.060	2.116
Yukon-Koyukuk	1.069	1.711	1.753	1.795	1.835
Yupit	1.596	1.628	1.660	1.692	1.723
Mt. Edgecumbe High School	1.098	1.125	1.148	1.173	1.195

Taylor Plan History

Mr. Patrick F. Taylor conceived the idea of the Taylor Plan in 1988 when he was asked to speak to 183 underachieving inner-city seventh and eighth-grade students at Livingston Middle School in New Orleans East. These students had been held back in school, many more than once. They were not expected to make it past the eighth grade, let alone enter high school. Most had lost all hope in themselves and were planning to drop out of school.

When Mr. Taylor asked the Livingston students whether they wanted to go to college, every hand in the room went up. Curious about this paradox, Mr. Taylor soon learned that the students' parents had given up on their children. Since the parents could not afford to send their children to college, they were not pushing their children to do well in school. Mr. Taylor challenged these middle school kids (who became known as "Taylor's Kids"): if they maintained a B average in school in a college prep curriculum and stayed out of trouble, he would make sure they could go to college.

Approximately half of these original "Taylor's Kids" graduated from high school, and half of those students entered college. Five of the original Taylor's Kids were selected for *Who's Who Among American High School Students*.

The students' response to his challenge caused Mr. Taylor to examine the status of access to higher education in the late 1980s. He discovered numerous national reports and surveys showing that more than 80% of American parents felt they could not afford to send their children to college. Yet survey after survey showed that if kids were given an opportunity to break the financial barrier, many would strive for a college education.

In 1989, Mr. Taylor gathered data on college performance and costs. He learned that virtually every university in Louisiana had an open admissions policy. As a result, students came to college unprepared and dropped out in alarming numbers. This proved an expensive proposition for both the students and the state taxpayers footing the bill for the higher education system in the state. He also found the ACT was below the national average, and students graduating from high school needed remedial instruction in virtually every basic subject at the college level.

After much hard work, Mr. Taylor convinced the Louisiana Legislature to adopt what the news media named the "Taylor Plan." It guaranteed access to college for low and moderate-income students based on their academic achievements, and not on their ability to pay. The first Taylor Plan was signed into law on July 10, 1989.

The original 1989 Taylor Plan required that students earn a 2.5 GPA in a 17.5 unit college prep curriculum and score of 18 on the ACT. Because the program was implemented initially for low- and moderate-income students, the legislature capped the family income requirement at \$25,000 (two year adjusted gross) for families with one dependent child, increasing it by \$5,000 for each additional child up to a maximum of \$35,000. The Taylor Plan awarded qualified students with tuition and fees at any four-year public college or university of their choice in Louisiana.

When longtime CBS newsman Mike Wallace featured Mr. Taylor with the Taylor's Kids on a *60 Minutes* segment in September 1989, Mr. Taylor's mission took on a national scope, as other states called wondering how to implement a similar program. That same year, Mr. Taylor convinced New Mexico to enact a version of the Taylor Plan program. In 1990, Texas, Florida, and Indiana, voted for state-paid college tuition assistance programs for their children. In 2005, Wyoming became the 22nd state to enact a Taylor Plan.

In Louisiana, the current version of the Taylor Plan is known as "TOPS" (Tuition Opportunity Program for Students). TOPS requires a 2.5 GPA, a 16.5 unit college prep curriculum while in high school and a minimum score of 20 on the ACT. In 1997, at Mr. Taylor's urging, the Louisiana Legislature eliminated family income as a requirement.

To obtain more information on TOPS, students should contact their high school counselor, or the Louisiana Office of Student Financial Assistance at (800) 259-5626, ext. 1012. Students may also visit www.osfa.state.la.us



Patrick F. Taylor

1937-2004

**President, Chairman, CEO, and sole
owner of the Taylor Energy Company
in New Orleans
Creator of the Taylor Plan (TOPS)**

In Louisiana, Texas, and throughout this great nation, the name "Patrick F. Taylor" is synonymous with access to quality education. A successful oilman, inspiring leader, and a prominent citizen in his community, Mr. Taylor wholly committed himself to the ideal that every young person should have the opportunity to achieve a quality college education in the United States.

Mr. Taylor was born in Beaumont, Texas, on June 12, 1937. He received a full scholastic scholarship from the Kinkaid School in Houston and completed school, despite leaving home at age 16. After high school, he left Texas to attend Louisiana State University. Because LSU did not charge tuition, Mr. Taylor was able to receive a college education. During his sophomore year at LSU, Mr. Taylor joined the Marine Corps PLC Officer Training Program. Unfortunately, a heart condition prevented the completion of his senior course, and Mr. Taylor was honorably discharged from the Corps on October 16, 1959.

After graduating from LSU with a degree in Petroleum Engineering, Mr. Taylor worked for Texas oilman John Mecom, Sr. until 1966. He then formed his own consulting and production company. In 1974, he joined with Mr. Mecom and started Circle Bar Drilling Company. That very successful drilling contracting company was sold in 1979, at which time Mr. Taylor formed Taylor Energy Company in New Orleans. Today, Taylor Energy Company is one of the larger independent oil companies in the Gulf of Mexico and remains solely owned. Taylor Energy Company LLC is the only individually owned company ever to explore for and produce oil and natural gas in federal offshore waters in the Gulf of Mexico. Mr. Taylor was the Chairman, President, and CEO of Taylor Energy Company LLC until his death on November 5, 2004. Mr. Taylor died of complications due to bacterial endocarditis.

In March of 1988, Mr. Taylor was asked to speak to 183 underachieving and troubled inner-city 7th and 8th grade students who planned to drop out of school. Remembering the significance of his own college opportunity, Mr. Taylor decided that he would not give a typical "role model" speech. Instead, he promised the kids that he would see to it that they went to college. They would be required to stay in school, stay out of trouble, and complete a college preparatory high

school curriculum with a B average. The response from the students and their parents was overwhelming. Many went on to college, and five of those students were recognized in *Who's Who Among American High School Students*.

During the course of these efforts, Mr. Taylor realized for the first time that an entire generation of America's low-income youth was growing up thinking that college was "for other folks." Mr. Taylor initiated research in Louisiana to determine the reason for this belief. That study confirmed that a full three-quarters of Louisiana families could not afford college for their children. Moreover, this was not limited to Louisiana.

Convinced that all children are entitled to the opportunity to achieve success, Mr. Taylor conceived and prepared legislation for Louisiana to address the issue. The first bill introduced provided for state-paid college tuition for academically qualified students from families with less than a \$25,000 annual income (income cap has since been removed). Applicants had to complete an advanced high school core curriculum with a 2.5 grade point average and receive a minimum score of 18 on the American College Test (raised to 20, effective Fall 1999). After a ferocious battle in the Louisiana Legislature, this bill became ACT 789, and the first "Taylor Plan" was signed into law on July 10, 1989. In Louisiana, a college education for all children was now based on their ability to learn rather than their ability to pay.

In the meantime, the national media coverage of Mr. Taylor's unique offer to the original 183 "Taylor's Kids" had attracted the attention of Mike Wallace, longtime CBS newsman. Mr. Wallace had CBS cover the legislative battle during the summer of 1989, and he personally interviewed the kids and their parents. In September of that year, *60 Minutes* ran a feature on the "Taylor's Kids," the Taylor Plan, and Mr. Taylor. The national attention caused by the *60 Minutes* feature led to a flood of invitations for Mr. Taylor to carry his message around the nation.

What began in Louisiana as the first state-paid, merit-based tuition program has now spread to include 22 states with Taylor Plan programs. Today, thanks to Mr. Taylor, millions of American children have the opportunity to go to college based on their ability to learn, and not their ability to pay.

In 1985, Mr. Taylor founded the Patrick F. Taylor Foundation, a philanthropic organization benefiting education, law enforcement, military, charitable community organizations, and other humanitarian efforts.

Mr. Taylor established an endowment of more than a \$1,000,000 to carry the college opportunity message to students and their families in Louisiana. Each student in grades 7th through 12th who has completed the school year with 2.5 or higher grade point average is rewarded with a year's membership to New Orleans Audubon Aquarium and Zoo, as well as the New Orleans Museum of Art. Since its inception, over 1,000,000 Louisiana students have received Taylor/Audubon/NOMA Students and Scholars Program awards. Mr. Taylor's endowment guarantees that the program will continue in perpetuity.

Mr. Taylor received awards and honors from many organizations, including the United States Marine Corps, Marine Forces Reserve, Marine Corps League, Department of the Navy, Veterans of Foreign Wars, U.S. Olympic Committee, Horatio Alger Association of Distinguished Americans, National Brotherhood of Christians and Jews, NAACP, Urban League, Society of Petroleum Engineers, Caring Institute, Kiwanis International, Rotary International, Volunteers of America, Freedoms Foundation of Valley Forge, and the National Football League. Pope John Paul II bestowed upon him the Medal of Benemerente, the highest award given by the Vatican to a non-Catholic. Numerous local, state, and Federal law-enforcement agencies, including the Federal Bureau of Investigation, the U.S. Customs Service, and the U.S. Secret Service have cited Mr. Taylor's efforts. In addition to his numerous awards and honors, Mr. Taylor received several Honorary Doctorates from colleges and universities. He served on various boards of national charitable foundations, as well as the National Petroleum Council.

Mr. Taylor was recognized as the first and only billionaire from Louisiana by *Forbes* magazine's 400 Richest Americans list (October 2004 issue). As a poor kid from East Texas, he had never chosen to publicly emphasize his wealth, but preferred to be recognized for his contributions to education, law enforcement, the military, and his community.

AWARDS/HONORS

- The 1986 Horatio Alger Award.
- The 1988 35th Annual Weiss Award from the New Orleans Chapter of the National Conference of Christian and Jews.
- The 1988 Young Leadership Council Role Model Honoree.
- The 1989 Outstanding Business Leader Award from Northwood University.
- The 1989 Benemerente Medal from Pope John Paul II, February 26, 1989.
- Received the Distinguished Service Medal (Gold) awarded by the Marine Corps League on April 13, 1989. This is the League's highest honor and was awarded for the first time to a citizen outside the military.
- The 1990 NAACP Louisiana Man of the Year.
- The Freedom Foundation National Service Medal, March 1990.
- Urban League of Greater New Orleans 1990 Whitney M. Young, Jr. Memorial Award.
- Louisiana Federation of Republican Women's 1991 American Hero Award.
- The Department of the Navy's 1993 Meritorious Public Service Award from the Commandant of the Marine Corps.
- Society of Petroleum Engineers' 1993 Public Service Award.
- Louisiana State University Foundation's 1993 Foundation President's Award for Lifetime Support.
- 1993 National Caring Award from the Caring Institute of Washington, D.C.
- 1995 Louisiana Citizen of the Year Award from the Louisiana Association of Student Councils.
- 1998 Volunteers of America (VOA National), Outstanding Community Service Award.
- Mayor's 1998 Medal of Honor, City of New Orleans, October 1998.
- New Orleans Police Department, Commendation Award, January 1999.
- Top 10 Businessmen in New Orleans, WYES-TV 15th Annual "Informed Sources" Show, March 1999.

- Louisiana State University, the College of Engineering Hall of Distinction, April 1999.
- Honored with "Patrick F. Taylor Day" in Louisiana as designated by Governor Foster to honor Mr. Taylor on July 10, 1999, on the Taylor Plan's 10th Anniversary.
- Honored by Proclamation by the New Orleans City Council for the Taylor Plan's 10th Anniversary, August 5, 1999.
- Honored by the New Orleans Hilton, Walk of Fame, for Taylor Plan/TOPS, October 6, 1999.
- Honored by the Mayor's Military Advisory Committee of Greater New Orleans, Outstanding Achievement Award, November 4, 1999.
- Honored by Network '99, Humanitarian of the Century Award, November 26, 1999.
- Honored by the Kiwanis International Foundation, the George F. Hixson Fellowship, January 26, 2000.
- Honored by Rotary Foundation International, the Paul Harris Fellow Award, February 2000.
- Honored by the National Football League Alumni Association, Caring for Kids Award, February 2, 2002.
- Honored by the New Orleans Museum of Art, the Isaac Delgado Award, April 4, 2002.
- Honored by the Kingsley House, the Beverly Warren Award, May 2002.
- Honored by Kappa Delta Pi, Points of Excellence, October 16, 2002.
- Honored by United Daughters of the Confederacy, Jefferson Davis Historical Gold Medal Certificate, January 19, 2003.
- Honored by the Republican Professional Women of St. Tammany, Carol Beck Scholarship Award, May 6, 2003.
- Selected as 1 of 70 outstanding leaders throughout the world to receive the Toastmasters International Communications and Leadership Award, May 17, 2003.
- Honored by the New Orleans Regional Chamber of Commerce, Stephen Ambrose Esprit de Corps Award, May 29, 2003.
- Honored by National Council of Negro Women of Greater New Orleans, Bethune Trailblazer Award, November 15, 2003.

- Honored by the Executive Women International/New Orleans Chapter, Executive of the Year, November 18, 2003.
- Honored by Urban League of Greater New Orleans, Equality Award, December 4, 2003.
- Honored by Memorial Hall Foundation of New Orleans, Frank T. Howard Award, January 24, 2004.
- Honored by the Sons of Confederate Veterans, Horace L. Huntley Award, January 24, 2004.
- Named Part-time Superintendent of the New Orleans Police Department by Chief Eddie Compass, Superintendent NOPD, February 5, 2004.
- Honored by the Child Welfare League of America in Washington D.C., Champion for Children Award, February 25, 2004.
- Honored by Minerals Management Service, New Orleans District Safety Award for Excellence, April 15, 2004.
- Streetcar named in his honor by Regional Transit Authority, May 18, 2004.
- Honored by Big Brothers/Big Sisters, Tribute of Excellence Award, November 6, 2004.
- Posthumously honored by the Louisiana Legislative Black Caucus, Pinkie Carolyn Wilkerson Humanitarian Award, November 27, 2004.
- Posthumously honored by the Louisiana American Italian Sports Hall of Fame, Civic Recognition Award, January 15, 2005.
- Posthumously honored by the City of New Orleans/Martin Luther King Holiday Planning Commission, Quiet Hero Award, January 15, 2005.
- Posthumously honored by the Pelican State Pachyderm Club of Louisiana, 2004 Pachyderm Republican Achievement Award, February 15, 2005.
- Posthumously honored by Minerals Management Service, Corporate Leadership Award, April 26, 2005.

HONORARY DEGREES

- Doctor of Science, University of New Orleans.
- Doctor of Laws, Northwood University.
- Doctor of Humanities, Northwestern State University.

- Doctor of Science & Humane Letters, Louisiana State University.

APPOINTMENTS

- Board of Supervisors of the LSU System, 1983-1986.
- The National Petroleum Council, an advisory committee to the U.S. Secretary of Energy, 1990-1997.
- Executive Professor, Graduate School of Business Administration, Northwood University, 1992.
- Honorary Director, Lajos Markos Art Foundation, 1996-1997.
- Member of the Tobacco Settlement Financing Corporation Board, appointed by Governor Foster, August 21, 2001.
- Member of the Marine Corps Heritage Foundation, 2000-2004.
- Board of Directors, National College Access Network, 2002-2003.

CIVIC, EDUCATIONAL, AND POLITICAL ACTIVITES

- Louisiana Olympic Committee.
- Chairman Republican State Finance, 1986.
- Member of Louisiana State University Board of Supervisors, 1983-1986.
- Chairman LaFete Prelude, 1985.
- Chairman March of Dimes "Team Walk" for New Orleans, 1985-1990.
- Member of Board of Directors of the University of New Orleans Foundation, 1987-1999.
- Member of Board of Directors for March of Dimes, 1987.
- Co-Chairman March of Dimes Gourmet Gala, 1987.
- Finance Chairman of the New Orleans Commission on the Bicentennial of the Constitution.
- Chairman of the Greater New Orleans Convention Fund.
- Member of the Board of Directors of Junior Achievement of Southeastern Louisiana, 1989-1991.
- Founding Member of the World War II Museum.
- Member of Louisiana Maritime Museum.
- Member of the Board of Directors of the U.S. Coast Guard Foundation, 1988-1996.
- Member of the Board of Directors of the Louisiana Association of Business and Industry, 1989-1992.
- Established the Taylor Scholarships for National Merit/National Achievement Finalists at University of New Orleans, March 2, 1988.
- Established "Taylor's Kids" program to provide a college education for 183 under-achieving students at Livingston Middle School in New Orleans, March 16, 1988.
- Created the Taylor Plan to achieve equal opportunity of college education for qualified Louisiana youth statewide. A bill based on the plan was passed by the Louisiana legislature and signed into law on July 10, 1989.
- Featured on the September 24, 1989 and the September 2, 1990 telecasts of *60 Minutes* in a documentary on Mr. Taylor by Mike Wallace.

- The Taylor Plan became law in 20 states, including Louisiana with several others considering such action, 1989 to current date.
- Member of the Board of The National Conference of Christians and Jews, 1989.
- Chairman of the 1989 Greater New Orleans Area Unit Crusade for the American Cancer Society, Louisiana Division, Inc.
- Member of the Dean's Advisory Council of the College of Arts and Sciences at Tulane University, 1990.
- President and Chairman of the Board Project New Orleans, founded with the cooperation of 18 corporate entities, which committed \$2 million to cover living and personal expenses to Taylor Plan students from poverty and low-income families.
- Appeared on February 6, 1991 telecast of the *700 Club* in an interview with Dr. Pat Robertson.
- Member of the National Petroleum Council, an advisory committee to the U.S. Secretary of Energy, 1990-1997.
- Associate Lifetime Member of the Military Order of Foreign Wars, Louisiana Chapter, July 30, 1998.

MILITARY INTERESTS AND ACTIVITIES

- Participated in the Marine Corps PLC Program as a student attending Louisiana State University.
- Attended the U.S. Naval War College Current Strategy Forum in Newport, Rhode Island, in June 1985-1988.
- Participated in Exercise Black Bird, an anti-terrorist training exercise with the U.S.S. Forrester (CV59) in the Atlantic, April 1986 in his offshore race boat, Tiger Tayl.
- Participated in the Launching of the U.S.S. San Juan (SSN 751) in Groton, Connecticut, and in August 1988 in its commissioning in Groton.
- Selected by the United States Secretary of Defense to participate in the 53rd Joint Civilian Orientation Conference on a nationwide tour of U.S. Military activities in May 1988, in recognition of his achievements, support, and as a distinguished American citizen.
- Attended the Defense Orientation Conference Association seminar in Colorado Springs, Colorado, July 15-17, 1989.
- Received the 1993 Meritorious Public Service Award from the Commandant of the Marine Corps on April 17, 1993.
- Member of the Board of Directors of the U.S. Coast Guard Foundation.
- Received an Associate Lifetime Membership to the Louisiana Chapter of the Military Order of Foreign Wars on July 30, 1998.
- Actively supported the United States Marine Corps and Young Marines Program.

Alaska State Legislature

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Juneau, AK 99802
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Toll Free (800) 665-2689
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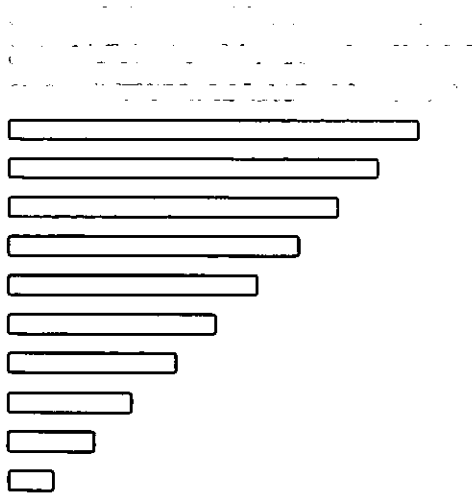
HOUSE EDUCATION COMMITTEE Representative Paul Seaton, Chairman

Memorandum

From: Representative Paul Seaton, Chairman
To: House Education Committee Members
Date: January 26th, 2009
RE: Letter between Ketchikan Gateway Borough and Governor's office regarding Required Local Effort

The attached letter from the Governor's office in response to the Ketchikan Gateway Borough (KGB) letter mentions that the issue raised by the KGB has been referred to the Departments of Law, Commerce, and Education. We have not at this point received a response from the departments on this issue, and won't be taking action on this issue at this time. The inclusion of these materials in your packet is to make the committee aware of the issue. Further discussion of the issue will take place when we receive responses from departments.

Taylor Plan Overview



State of Alaska

January 2009

Patrick F. Taylor Foundation • One Lee Circle • New Orleans, LA 70130
(504) 589-0555

www.TaylorPlan.com

Dr. James Caillier, Executive Director
Bill Schilling, Special Representative

President, Wyoming Business Alliance / Wyoming Heritage Foundation
(307) 262-5990



Taylor Plan Philosophy

- No qualified student turned away
- 2.5 G.P.A.; core college preparatory curriculum; state average on ACT test
- Tuition “earned;” not an entitlement
- Post – secondary tuition / up to four years of college / continuous
- Incentive based / reward concept—better you do, greater the scholarship



Benefits

Better Preparation = Better Success

- Greater parental involvement
- Increased high school graduation rates
- Better preparation for college and post-secondary education
- More high school graduates going to college in the state
- Less remedial education / Increased college completion rates
- A competitive workforce for the future



Origin and History

Taylor's Three Questions in 1988/183 New Orleans inner city kids

1.) "Would you like to go to college?"

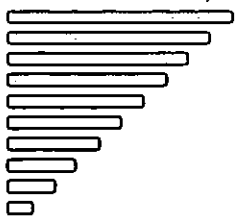
All of the students raised their hands and said "yes".

2.) "Can you go to college?"

Not one of them raised their hands.

3.) He again asked, "How many of you would like to go to college if you could?"

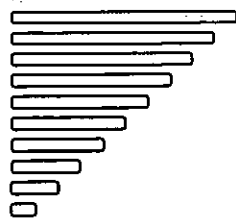
All raised their hands and said "yes".



Origin and History

Patrick Taylor

- Billionaire oilman from New Orleans
 - Founder of Taylor Energy and Taylor Foundation
 - Featured on 60 Minutes twice
 - Died in November 2004
 - Taylor Foundation Commitment Continues
-



“Taylor Plan’s” First Class

- Louisiana “TOPS”—first merit based scholarship program
- Five listed in Who’s Who for High School Graduates
- 100 of 183 went to college
- Completion rate better than nation’s
- Yearly ranch gathering

“Taylor Plan” States

- o 1989 – Louisiana
- o 2005 – Wyoming
- o 22 as listed

Alabama
Arkansas
California
Florida
Georgia
Indiana
Kentucky
Louisiana

Maryland
Massachusetts
Mississippi
Missouri
Nevada
New Mexico
North Carolina

Oklahoma
Rhode Island
South Carolina
Tennessee
Virginia
West Virginia
Wyoming

- o 2007 Presentations

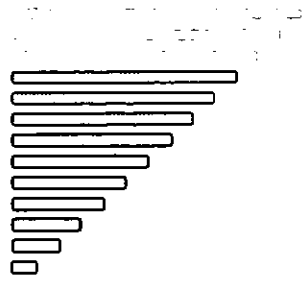
Alaska
Montana
Utah

6/18-19; 9/8-12; and 11/29
3/19; 4/23-24/ 5/11; and 10/23
2/16 and 2/24-25

- o 2008 Presentations

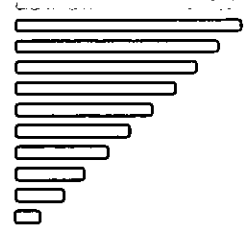
Alaska
Montana

2/8; 6/25
8/15; 9/4



Wyoming Legislative Process

2004	Wyoming Forum "How Are the Children"
2005	Concept Approval / Funding Mechanism
2006	Scholarship Categories / Levels
2006	Constitutional Amendment
2007	Success Curriculum



Wyoming “Hathaway Plan” Model

- 4 Scholarship Categories
 - 3 Tuition Levels
 - Success Curriculum / Graduation Requirements
 - \$400 million endowment / \$15 million yearly interest income
 - University of Wyoming / Community Colleges
 - Administrator: Department of Education
 - Named after former Governor Stan Hathaway
-



Scholarship Categories / Levels

- Honors – 3.5 G.P.A. / 25 Act / 100% Tuition (\$1600 per semester);
 - Performance – 3.0 G.P.A. / 21 ACT / 75% Tuition (\$1200 per semester);
 - Opportunity – 2.5 G.P.A. / 19 ACT / 50% Tuition (\$800 per semester); and
 - Career – 2.5 G.P.A. / 17 ACT or 12 cumulative WORKKEYS score / 50% Tuition (\$800 per semester);
 - Applicable for community colleges and the University of Wyoming for full-time students for four years
 - Career scholarship is for technical degrees
 - Need based scholarship available for unmet need greater than \$2000
-

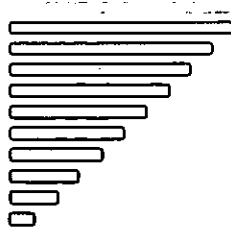


Success Curriculum

- **Honors and Performance**
Four years math, science and language arts; three years social studies; and two years foreign language
- **Opportunity**
Four years math and language arts; four years science and three social sciences; and proficiency for state standards in foreign cultures
- **Career**
Two years math, state standards for foreign cultures proficiency, and state standards required for language, science and social sciences for graduation

Endowment

- 4 Year ramp-up
- 2009 – Fully operative
- 2006 – 1500 Scholarships / \$3 million
- 2009 – 8000 Scholarships / \$15 million



Wyoming's Challenges

- Energy Boom
 - Least diversified state
 - Declining K – 12 population / aging population
 - Number one in K – 12 and higher education funding:
 - Average, not great, educational quality
 - Four year degrees / below national average
 - 28th in high school graduation rate
 - Class 2007 dropouts / \$460 million cost
 - \$10 million yearly in remedial education
-



U.S. Challenges

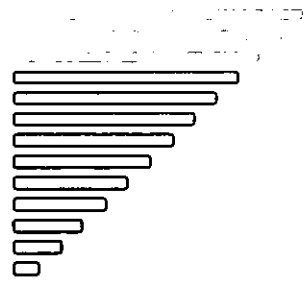
- World is flat / new centers of influence
- Intellectual capital / resource wealth
- Of the 29 OECD countries: reading literacy, 15th; mathematics, 24th; science, 19th; and problem solving, 15th.
- Graduation rates, 18th of 23; top seven / graduation rates of over 90%
- College attainment—2% increase in the U.S. while 11% in OECD countries / three generations
- High School dropouts over a lifetime earn \$260,000 less than graduates.

The class of 2007 drop-outs will cost the nation \$329 billion in lost wages, taxes, and productivity.



Policy Questions

- Target audience / kids or parents / "haves" versus "have nots"
 - Need based or merit based
 - Small schools / curriculum requirements
 - C+ launch pad / reachable for most
 - Supporter and opponent landscape
 - Institutional resistance / acceptance
 - Grassroots support: parents, business and community
 - Affordability and funding mechanism / General Fund or endowment
 - Return on investment
 - State advocate(s)
-



Taylor Foundation Role

- Multi-state involvement nationwide
- Presenting and consulting
- Meeting convener
- Research
- "Taylor Plan" models / variations

Taylor Plan

Louisiana TOPS Education Backgrounder

May 21, 2008

Education is essential for a strong economy and individual advancement. Louisiana's commitment to education and the TOPS program is a testament to the belief that despite horrendous hurricanes and economic setbacks, progress and hope for the future persist.

Louisiana was hit by four major hurricanes between 2003 and 2005. Hurricanes Rita and Katrina in 2005 were devastating. Of the top ten U.S. disasters, Katrina at \$30 billion was three times greater the 9/11/01.

Louisiana's population decreased by 250,000 after the 2005 hurricanes. The state's population in 2005 was 4,507,331; in 2007, 4,293,204, including the return of some 50,000 residents. Louisiana for a number of years has had minimum population growth. Between 1990 and 2005 the population increased by 287,358 a scant 6% in 15 years.

In the 2004-2005 school years, there were 42,450 TOPS (Taylor Plan / Tuition Opportunity Program for Students) students enrolled in Louisiana's two year, four year and technical schools. In the 2007-2008 school year, the number was 41,949, a slight decline from the 2004-2005 mark because of the 2005 hurricanes. For this academic year (2007-2008), the total scholarship expenditure is set for \$116,068,652—the average payment being \$2767. Between 1998 and 2007, the number of TOPS students grew from 23,509 to 41,949—78%.

Baseline Summary

- Despite a population growth of just 4% between 1998 and 2005 (pre-Katrina / Rita), the number of TOPS students increased from 23,509 to 42,450—an increase of 81%.
- Hurricane Katrina and Rita resulted in the displacement of 96,631 K-12 students.
- In 2007 66% of high school graduates completed the Core success curriculum for college (27,230 of 41,370 graduates); in 2003, 56% (25,546 of 45,226).
- The high school graduation rate has increased from 61% in 1991 (48th in the nation and 11% below the national rate of 72%) to 69.4% in 2004 (39th and 5% below the nation). In 2006 it dropped to 64.8%—no doubt a hurricanes causal factor.
- College readiness improvement between 1991 and 2002—from 22% to 35%—was second best in the nation.
- High School graduates eligible for and enrolled with TOPS has improved since Katrina—91% in 2004 (pre-Katrina) – 83% in 2005 (years of Katrina) – 88% year after Katrina.
- ACT average scores for first-time post-secondary freshman increased from 19.4 in 1996 to 20.1 in 2006—above the minimum ACT standard of 19 for college preparedness.

- Persistence of TOPS students is much better than non-TOPS students—4th year for the class that entered 2003 is 77%—well above the national average. It was 42% for non-TOPS students.
- The TOPS program is administered by the Louisiana Office of Student Financial Assistance. According to Richard Ordal, (225) 922-1043, TOPS has 14 employees. Its operational budget of \$1.296 million (\$31 per TOPS student) represents 1% of TOPS' \$119,121 million budget for the current school year. TOPS' has two additional employees for the Go Grant Program and Dual Enrollment Program.

High School Performance

High School enrollment in Louisiana declined by 4% between 1990 and 2000. The percent of minority students for the school year 1999-2000 was 51%, versus a national rate of 38%; percent of children under 18 years in poverty (1999) was 26% versus 19% nationally. College readiness increases for Louisiana high schoolers has surpassed the national rate—35% versus 34%.

Core Curriculum

- 66% of 2007 high school graduates took the more rigorous Core curriculum versus 56% in 2003.
- 64% of Louisiana students scored a 3 or higher on the advanced placement exam versus 61% nationally.

ACT Scores

- **Louisiana** 1991 – 19.4; 1999 – 19.6; 2006 – 20.1; **U.S.** 1991 – 20.6; 1999 – 20.0; 2006 – 21.1.
- 79% of all Louisiana high schoolers took the ACT test in 2007; Montana's rate in 2004 was 56%; the national rate 40%.
- Over the past 5 years Louisiana's state composite has risen .5 points versus nationally .4.
- 71% of Louisiana's ACT test takers in 2001 completed ACT's Core curriculum versus 60% nationally.

Graduation Rate

- Louisiana: 1991 – 61%; 2003/2004 – 69.4%.
U.S.: 1991 – 72%; 2003/2004 – 74.3%.
- For the time frame, Louisiana's improvement of 7.4% was one of the best in the nation.
- All young adults with a high school diploma or GED: 82% Louisiana; 85% U.S.

- **By Sector**

White

Louisiana 1997 – 63%; 2002 – 69%
U.S. 1997 – 76%; 2002 – 78%

African-American Graduation Rates

Louisiana 1997 – 52%; 2002 – 56%
U.S. 1997 – 54%; 2002 – 56%

College Readiness

- Louisiana 1991 – 22%; 2002 – 35 %
U.S. 1991 – 25%; 2002 – 34%
- Louisiana’s improvement of 13%--from 22% to 35%--was the second best in the nation

College Preparation

- 56.5% of high school graduates in 2003 took the Core versus 65.8 in 2007
- The number taking the Core has increased despite devastating hurricanes, loss of student population and minimum state population growth.
- Eligibility for TOPS awards continues to grow – from 14,797 in 2003 to 15,273 in 2005. It declined slightly in 2006 due to Katrina.

College Performance

The number of college students in Louisiana with TOPS Scholarships continues to grow—despite devastating hurricanes, overall population decreases, and increases in Core curriculum rigor. ACT scores have increased from 19.4 to 20.7—to a level above the minimum predictor for college success and yet another positive attribute of the core high school success curriculum. Almost 90% of high school graduates eligible for TOPS stay in Louisiana for their college education.

Enrollment Growth

- Between 1989 and 1999 the percentage of adults earning post-secondary and technical degrees increased by 24% in Louisiana versus 7% in the U.S.
- Between 2004 and 2005, higher education enrollment in Louisiana declined by 19.7% due to Katrina and Rita.
- In 2004 Louisiana had 214, 144 students in higher education; in 2006 195, 380—a decline of 18, 764, or 9%, as a result of the hurricanes.

Admissions Criteria

- 81.9% of the Fall 2004 entering class met 2005 admission criteria.

- Anticipated even better preparation for Fall 2005 according to the Board of Regents.

Student Retention

- Between the 1996-1997 school year and 2001-2002 year, freshman to sophomore year retention increased from 71% to 75%.
- For students who enrolled in post-secondary in 2003, 88% returned for their second year versus 60% for those without TOPS.
- For fourth year students in 2007, 77% were still in college versus 42% for non-TOPS counterparts.

Degrees Awarded

- Between 1994-1995 school year and 2003-2004, the number of degrees and certificates awarded annually increased from 22,904 to 26,449—a 15% increase.
- 59% TOPS students at four year institutions graduate within six years, versus only 25% of non-TOPS students.

Funding

- Between 1983 and 1993 Louisiana ranked 48th in the nation in percentage of post-secondary-funding increases. For the years 1994-2002, the state was second in the nation.

Brain Drain

Louisiana's challenges in terms of keeping college graduates in the state are no different than other historically slow growth and traditional industry (i.e., moderately dependent economy versus diversified economy) states across the country, including Montana. Since the 1980's Louisiana has struggled with mediocre population growth and image problems. That has changed, and continues to change as evidenced by efforts to restructure the economy and higher education endowed chairs (33) and professorships (265) at LSU.

- The 2005 hurricanes decreased jobs in the state to 1997 levels. By the end of 2007 the state was within 3700 jobs of 2005.
- By mid – 2008, with a projected increase of 37,700 jobs (1.9%), the state will set new employment records.
- A unique program through Louisiana State's E.J. Ourso College of Business promotes jobs for Louisiana graduates—www.LouisianaGrads.com
- The oil and gas industry is booming and is hiring college graduates.

- According to Cathy Breaux (Louisiana Economic Development Department (225) 342-5375) TOPS graduates want to stay in Louisiana, but jobs for graduates continue to be a problem.
- Louisiana (43rd place), like Montana (38th) and nine other states, has a moderately dependent economy versus states like Georgia (11th) and Texas (13th) which have moderate diversification.

Report prepared by Bill Schilling, Taylor Foundation Representative, Casper, Wyoming, 307-262-5990.

National Center for Education Statistics

Scot
↓

Table 1. Revenues and percentage distribution of revenues for public elementary and secondary education, by source and state or jurisdiction: Fiscal year 2006

State or jurisdiction	Revenues (in thousands of dollars)				Percentage distribution		
	Total	Local ¹	State	Federal	Local ¹	State	Federal
United States ²	\$520,643,954	\$230,939,051	\$242,151,076	\$47,553,827	44.4	46.5	9.1
Hawaii ³	2,703,718	48,403	2,431,735	223,580	1.8	89.9	8.3
Vermont	1,348,836	92,275	1,154,694	101,868	6.8	85.6	7.6
New Mexico	3,148,752	451,153	2,241,203	456,396	14.3	71.2	14.5
Minnesota	9,191,384	2,052,372	6,543,838	595,175	22.3	71.2	6.5
Alaska	1,712,601	416,227	1,005,181	291,193	24.3	58.7	17.0
North Carolina	11,137,110	2,971,285	6,966,133	1,199,692	26.7	62.5	10.8
West Virginia	2,910,905	821,067	1,739,376	350,462	28.2	59.8	12.0
Mississippi	4,132,345	1,166,890	2,108,727	856,727	28.2	51.0	20.7
Delaware	1,533,399	436,604	969,854	126,940	28.5	63.2	8.3
California	63,785,872	19,048,880	37,847,078	6,889,913	29.9	59.3	10.8
Washington	9,759,939	2,948,407	5,933,610	877,922	30.2	60.8	9.0
Kentucky	5,909,930	1,835,133	3,383,793	691,004	31.1	57.3	11.7
Arkansas	4,282,506	1,364,486	2,432,920	485,100	31.9	56.8	11.3
Alabama	6,346,033	2,040,115	3,547,078	758,840	32.1	55.9	12.0
Michigan	18,978,793	6,158,717	11,259,666	1,560,410	32.5	59.3	8.2
Idaho	1,909,489	629,337	1,073,734	206,418	33.0	56.2	10.8
Oklahoma	4,859,546	1,618,449	2,591,377	649,719	33.3	53.3	13.4
Utah	3,441,688	1,214,036	1,897,355	330,297	35.3	55.1	9.6
Kansas	4,934,817	1,798,263	2,692,219	444,335	36.4	54.6	9.0
Louisiana	6,760,714	2,576,922	2,933,287	1,250,505	38.1	43.4	18.5
Montana	1,372,561	546,073	633,923	192,565	39.8	46.2	14.0
Oregon	5,427,586	2,160,833	2,737,046	529,706	39.8	50.4	9.8
Arizona	8,833,520	3,520,951	4,272,320	1,040,249	39.9	48.4	11.8
Wisconsin	9,726,952	4,053,773	5,086,692	586,486	41.7	52.3	6.0
Indiana	11,211,313	4,935,499	5,504,585	771,230	44.0	49.1	6.9
South Carolina	6,706,259	2,990,559	3,033,281	682,419	44.6	45.2	10.2
Wyoming	1,149,155	525,837	507,043	116,274	45.8	44.1	10.1
Iowa	4,734,934	2,169,503	2,158,230	407,201	45.8	45.6	8.6
Tennessee	7,307,380	3,385,282	3,105,334	816,764	46.3	42.5	11.2
Georgia	16,117,459	7,474,154	7,155,591	1,487,715	46.4	44.4	9.2
Massachusetts	13,850,962	6,571,045	6,507,612	772,305	47.4	47.0	5.6
Maine	2,372,152	1,133,513	1,004,899	233,741	47.8	42.4	9.9
North Dakota	958,109	459,781	347,093	151,235	48.0	36.2	15.8
Ohio	21,106,426	10,285,836	9,217,115	1,603,474	48.7	43.7	7.6
Colorado	7,269,475	3,648,933	3,089,571	530,970	50.2	42.5	7.3
New York	46,776,452	23,533,105	19,859,481	3,383,866	50.3	42.5	7.2
Florida	24,816,807	12,518,858	9,795,679	2,502,270	50.4	39.5	10.1
South Dakota	1,094,021	551,962	361,531	180,528	50.5	33.0	16.5
Rhode Island	2,047,019	1,049,791	840,435	156,794	51.3	41.1	7.7
New Jersey	22,799,624	12,155,282	9,642,530	1,001,813	53.3	42.3	4.4
Virginia	12,922,017	6,942,601	5,112,423	866,993	53.7	39.6	6.7
Texas	39,691,436	21,496,767	13,421,855	4,772,813	54.2	33.8	12.0
Maryland	10,680,716	5,828,189	4,189,323	663,204	54.6	39.2	6.2
New Hampshire	2,363,964	1,307,123	926,256	130,585	55.3	39.2	5.5
Pennsylvania	22,683,987	12,815,649	8,028,829	1,839,508	56.5	35.4	8.1
Connecticut	8,711,814	4,942,541	3,351,644	417,629	56.7	38.5	4.8
Missouri	8,908,447	5,131,324	2,982,806	794,318	57.6	33.5	8.9
Nebraska	2,972,026	1,728,024	946,683	297,318	58.1	31.9	10.0
Illinois	22,344,947	13,858,385	6,619,663	1,866,900	62.0	29.6	8.4
Nevada	3,696,968	2,474,464	958,743	263,761	66.9	25.9	7.1
District of Columbia ³	1,201,091	1,054,392	†	146,698	87.8	†	12.2

Other jurisdictions							
American Samoa	86,082	89	15,856	70,136	0.1	18.4	81.5
Guam	207,709	154,679	†	53,030	74.5	†	25.5
Commonwealth of the Northern Mariana Islands	66,905	322	37,210	29,372	0.5	55.6	43.9
Puerto Rico	2,917,236	133	1,984,178	932,924	#	68.0	32.0
U.S. Virgin Islands	193,291	152,997	†	40,294	79.2	†	20.8

† Not applicable.

Rounds to zero.

¹Local revenues include intermediate revenues.

²U.S. totals include the 50 states and the District of Columbia.

³Both the District of Columbia and Hawaii have only one school district each; therefore, neither is comparable to other states. Local revenues in Hawaii consist almost entirely of student fees and charges for services, such as food services, summer school, and student activities.

NOTE: Detail may not sum to totals because of rounding.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Common Core of Data (CCD), "National Public Education Financial Survey (NPEFS)," fiscal year 2006, Version 1a.

Components of Basic Need (Who Pays?)

- ↳ Required Local Contribution
- ↳ Federal Impact Aid
- ↳ State Aid

SB 174 Full & True Value/Local Effort Calculation

As a result of Senate Bill 174: (enacted in 2001)
Beginning FY2002, half of the increased current year full & true value over 1999 (base year), is added to 1999 base year to determine the full & true value for the purposes of calculating Required Local Effort for education.

(If the full & true value did not increase over the 1999 base year, then the current full & true value stands and is multiplied by .004 mills to reach local effort.)

Calculating Nome's Full & True Value

Nome's 2008 Full Value	285,923,800
Nome's 1999 Full Value	191,926,100
Full Value Increase Difference	93,997,700
Divided in Half	46,998,850
Half of the Increase is Added to 1999 Value	191,926,100 + 46,998,850 =
	238,924,950

Required Local Contribution

Example: Nome City Schools

The Lesser or minimum of 4 mills of the education full & true value, but not to exceed 45% of the school districts prior year basic need.

.004 of Tax Base: (Education Full & True Value)

$$.004 \times \$238,924,950 = \$955,700$$

45% of Prior Year Basic Need:

$$.45 \times \$8,972,788 = \$4,037,755$$

(Shown on Column C, page 9)

- The Alaska Student Loan Corporation (ASLC), created by the legislature in 1988 to provide a source of financing for state-administered education loans, has successfully issued bonds from 1988 through 2007. ASLC's tax-exempt bond issues have been structured using education loans as collateral.
- In 2008, due to the extended disruption in the capital markets, ASLC was unable to issue bonds. One reason for that was contagion from the sub-prime mortgage-backed bond market had spread to student loan-backed bonds—particularly in regards to non-federally guaranteed education loans such as the Alaska Supplemental Education Loans (ASELs). Rating agencies, financial partners and investors have substantially altered their level of scrutiny and qualitative standards for asset-backed bonds, resulting in ASELs being viewed as sub-prime loans.
- In short, ASELs as they exist today are no longer of sufficient quality to be effectively used to back bonds. In order for ASLC to be able to efficiently use ASELs to back bonds in the future, the credit standards applied to borrowers of these loans must be strengthened.
- Failure to make the proposed changes will seriously compromise ASLC's ability to finance its programs and operations in the capital markets. In that event the options will be 1) the State of Alaska will have to directly fund the ASEL program at an annual cost of approximately \$50 million, or 2) ASLC will substantially cease originating ASELs effective in 2009.
- In addition to the proposal to raise the credit standard for the ASEL, because in the increases in the costs of financing the loan program, there is also a need to alter the interest rate on the Alaska Family Education Loan (FEL). That loan rate is currently set in statute at 5%. The proposal is to set the FEL rate at the same rate charged on the ASEL—currently that rate is 7.3% and is capped in statute at 8.25%. Proposal would allow the Corporation to set the rate on these loans using the same program-costs based formula used for the ASEL.
- The timing of a change in the ASEL credit standard is fortunate in that it coincides with the 2008 increase in the federal Stafford loan limits.¹ Stafford loans, also offered by ASLC for Alaska students, are a federal entitlement to any student attending an accredited institution and no credit standard is considered in making these loans (except that the borrower may not be in default on an existing federal education loan). Furthermore, in January 2009 congress introduced a stimulus bill which provides for an additional increase in the Stafford loan limits of \$2,000 per year for an undergraduate program.

The actions described above are proposed at the recommendation of ASLC Executive Officer and Alaska Commission on Postsecondary Education Executive Director Diane Barrans. She is available to respond to questions or concerns and can be contacted at diane.barrans@alaska.gov or 465.2113.

¹ Annual Stafford borrowing limits are for dependent and independent students respectively: 1) \$5,500 and \$9,500 (freshman), 2) \$6,500 and \$10,500 (sophomore), 3) \$7,500 and \$12,500 (junior/senior), and 4) \$20,500 (all graduate).

BILL NO.

**IN THE LEGISLATURE OF THE STATE OF ALASKA
TWENTY-SIXTH LEGISLATURE - FIRST SESSION**

BY

**Introduced:
Referred:**

A BILL

FOR AN ACT ENTITLED

1 **"An Act relating to eligibility for the Alaska Supplemental Education Loan Program;**
2 **relating to the establishment of the interest rate for Alaska Family Education Loan**
3 **Program; and providing for an effective date."**

4 **BE IT ENACTED BY THE LEGISLATURE OF THE STATE OF ALASKA:**

5 *** Section 1. AS 14.43.172(c) is amended to read:**

6 (c) In addition to the provisions of (a) of this section, a borrower is eligible for
7 a loan under AS 14.43.170 - 14.43.175 if the borrower

8 (1) is not delinquent in payment on a loan previously awarded by the
9 commission;

10 (2) at the time of application or loan disbursement, does not have a
11 past due child support obligation established by court order or by the child support
12 services agency under AS 25.27.160 - 25.27.220;

13 (3) has not, within the previous five years, had a loan discharged or
14 written off by the commission for any reason;

1 (4) does not have a status, at the time of application for a loan or
2 disbursement of loan money, that would prevent the borrower from repaying the loan
3 as it becomes due;

4 (5) has not, within the previous five years, defaulted on another loan
5 made to the borrower by a lending entity unless the borrower can show good faith
6 efforts to repay the loan and extraordinary circumstances that led to the default;

7 (6) has [DOES NOT HAVE] a credit history, at the time of application
8 for a loan, that demonstrates an ability and willingness [CHRONIC INABILITY OR
9 UNWILLINGNESS] to pay an extension of credit or loan as it becomes due; and

10 (7) has complied with the military selective service registration
11 requirements imposed under 50 U.S.C. App. 453 (Military Selective Service Act), if
12 those requirements were applicable to the person.

13 * Sec. 2. AS 14.43.740(c) is repealed and reenacted to read:

14 (c) The interest rate on a loan made under AS 14.43.710 - 14.43.750 shall be
15 set by the corporation, but the annual rate may not exceed 8.25 percent.

16 * Sec. 3. The uncodified law of the State of Alaska is amended by adding a new section to
17 read:

18 TRANSITION: REGULATIONS. The legislature finds that the changes made by
19 sec. 1 of this Act constitute an emergency under AS 44.62.250, and that the adoption of
20 emergency regulations under AS 44.62 is necessary for the immediate preservation of the
21 general welfare in order that loans under the Alaska Supplemental Education Loan Program
22 will constitute assets the quality of which is such that they may be used as security for bonds
23 issued by the Alaska Student Loan Corporation to finance the operations of its education loan
24 programs. Therefore, the Alaska Commission on Postsecondary Education may adopt as
25 emergency regulations under AS 44.62 the regulations necessary to implement the changes
26 made by this Act.

27 * Sec. 4. The uncodified law of the State of Alaska is amended by adding a new section to
28 read:

29 TRANSITION: APPLICABILITY. This Act applies to loans made under AS 14.43
30 for the 2009 through 2010 loan year and for subsequent loan years. This Act does not apply to
31 loans made under AS 14.43 before the 2009 through 2010 loan year.

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WORK DRAFT

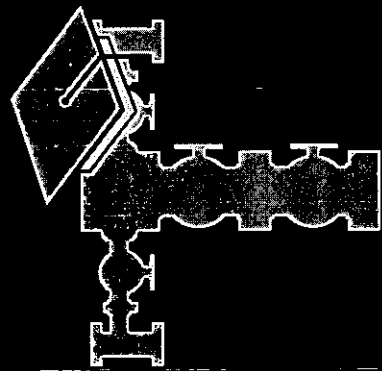
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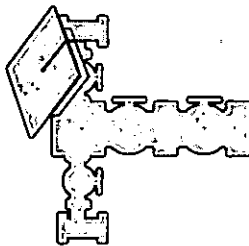
* Sec. 5. This Act takes effect immediately under AS 01.10.070(c).

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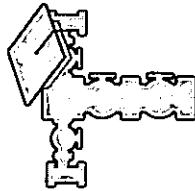
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PATRICK F. TAYLOR FOUNDATION



THE TAYLOR PLAN

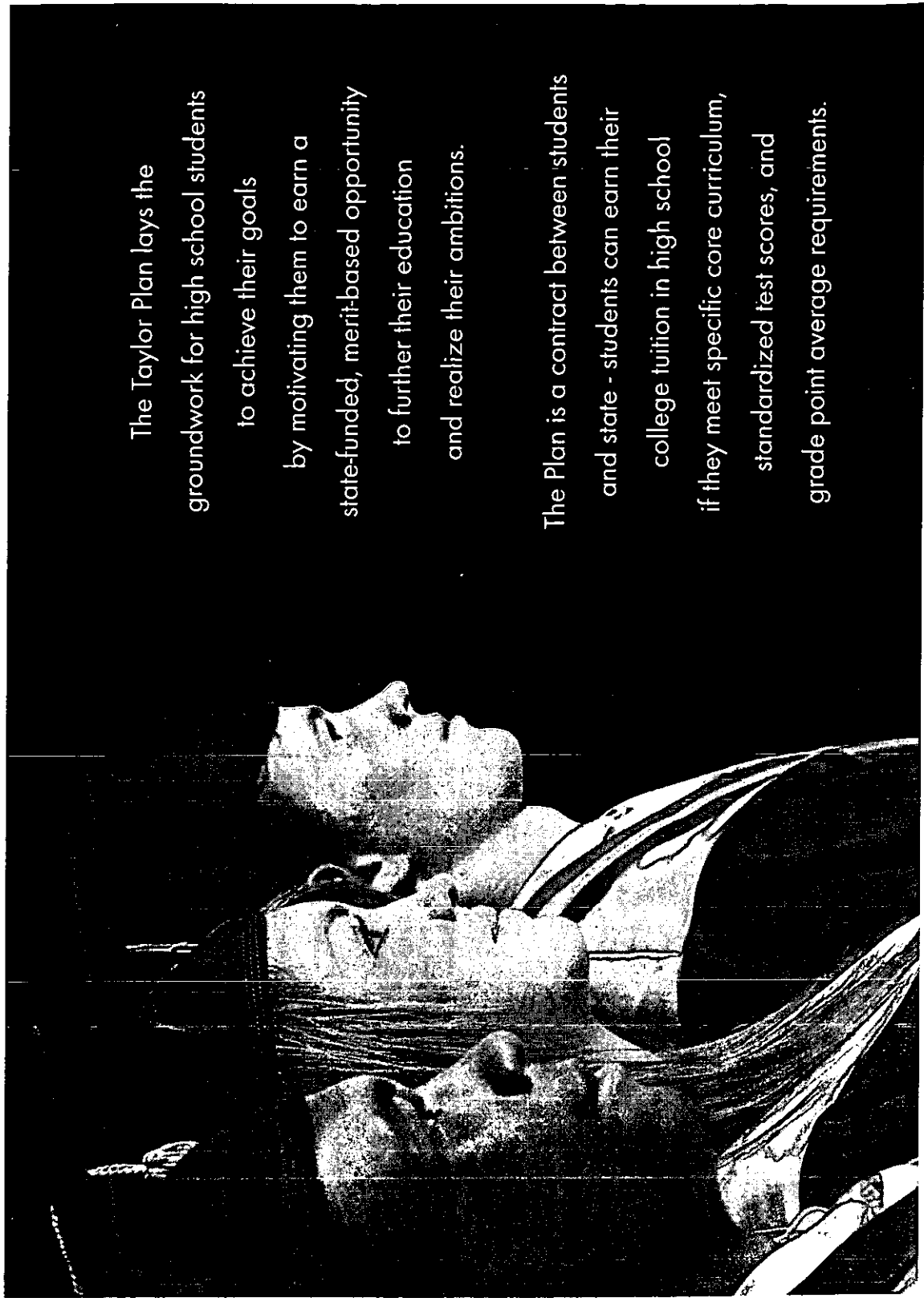


PATRICK F. TAYLOR FOUNDATION

One Lee Circle
New Orleans, Louisiana 70130
504.589.0555 (office)
504.589.0408 (fax)
www.taylorplan.com

The Taylor Plan lays the
groundwork for high school students
to achieve their goals
by motivating them to earn a
state-funded, merit-based opportunity
to further their education
and realize their ambitions.

The Plan is a contract between students
and state - students can earn their
college tuition in high school
if they meet specific core curriculum,
standardized test scores, and
grade point average requirements.



The Taylor Plan

"Students are not dropping out because it's too hard, but because it's too easy."

Patrick F. Taylor

Objective:

The Taylor Plan sets the standards for student achievement in high school, offering students a state-funded, merit-based opportunity to attend college or vocational/technical school. The Plan is a contract between students and state - students can earn up to a four-year, state-paid college tuition if they meet specified criteria.

Criteria:

The Taylor Plan is three-pronged: Students must take a specific core curriculum, make the required standardized test score, and meet grade point average requirements.

1. Curriculum

A college preparatory high school core curriculum, one both rigorous and appropriate, is necessary to fully prepare students for the challenges of college. The goal is to ensure high school graduates are college ready and graduation oriented.

The ideal high school core curriculum will include:

Units	Courses
4	English
4	Mathematics
4	Social Studies
4	Science
2	Foreign Language
1	Fine Arts
.5	Computer Science
19.5	Total

2. Standardized Test Scores

The Taylor Plan requires a student's ACT or SAT composite score to be at or above the state average.

3. Grade Point Average

A student's high school grade point average must demonstrate reasonable academic success. Therefore, the Taylor Plan requires a minimum 2.5 grade point average.

4. Vocational/Technical School

Students interested in pursuing careers requiring vocational or technical training are also able to earn a state-funded, merit-based opportunity to attend vocational/technical school.

College Eligibility:

The main focus of the Taylor Plan is college graduation, not simply enrollment. Therefore, to remain eligible, a student must achieve an appropriate level of academic success in college.

- *Students must maintain full-time status.*
- *At the end of year one, a student must earn a 2.3 minimum cumulative grade point average.*
- *At the end of years two through four, a student must earn a 2.5 minimum cumulative grade point average.*
- *Students must earn a minimum of 24 credit hours per academic year.*
- *The plan encourages students to graduate in four years (eight semesters).*

**"We cannot today celebrate the life of our children
if we are not prepared to both guarantee their opportunity and defend it.
We can do no less."**

Patrick F. Taylor

Patrick F. Taylor Foundation Beneficiaries

The following is a list of some of the organizations that have received contributions from the Patrick F. Taylor Foundation

- Academy of the Sacred Heart, New Orleans
- Adopt-A-Family School Uniform Campaign
- Advocates for Science and Math
- Agenda for Children
- American Cancer Society
- American Heart Association
- American Red Cross
- Archbishop's Community Appeal
- Archdiocese of New Orleans
- Arts Council of New Orleans
- Audubon Institute
- Big Brothers Big Sisters
- Boys & Girls Club of Southeast Louisiana
- Boy Scouts of America
- Bridge House
- Children's Hospital
- Children's Museum
- CLOUT Ministerial Alliance
- Coast Guard Foundation
- Collings Foundation
- Congressional Medal of Honor Foundation
- Covenant House
- Crohn's and Colitis Foundation
- Dallas Ecological Foundation Youth Fund
- Dress for Success
- E.A.A. Air Academy
- Easter Seals
- Easton Playground Boosters
- Efforts of Grace, Inc.
- Fifth Ward Elementary School
- Friends of City Park
- Friends of Jackson Barracks
- Greater New Orleans Council of the Navy League of the United States
- Greater New Orleans Foundation
- Greater New Orleans Suzuki Forum
- Horatio Alger Association
- Immaculate Conception Parish Jesuit Church
- Jefferson Dollars for Scholars
- Junior Achievement
- Ladies Leukemia League
- Longue Vue House
- Louisiana Association of Museums
- Louisiana Cancer Research Consortium in New Orleans
- Louisiana College
- Louisiana Endowment for the Humanities
- Louisiana Engineering Foundation
- Louisiana Historical Association
- Louisiana Philharmonic Orchestra
- Louisiana State University Foundation
- Make-A-Wish Foundation
- March of Dimes
- Marine Support Group
- MAX School
- Metropolitan Crime Commission
- Miracles and Milestones
- NAACP
- NOCCA Institute
- National Council of Jewish Women
- National Museum of the Marine Corps
- Naval Air Museum
- Naval Air Show
- New Orleans Ballet Association
- New Orleans Hispanic Heritage Foundation
- New Orleans Museum of Art
- New Orleans Police Foundation
- Offshore Rig Museum
- Orleans Dollars for Scholars
- Ozanam Inn
- Parkway Partners
- Project New Orleans Foundation
- Special Forces Association
- Special Olympics
- St. Augustine High School
- St. Joan of Arc School
- St. Michael's Special School
- St. Paul's School
- Teach for America
- The National World War II Museum
- The Nature Conservancy
- Tiger Athletic Foundation
- Touro Infirmary Foundation
- United Negro College Fund
- United Way for the Greater New Orleans Area
- University of New Orleans Foundation
- Urban League
- Ursuline Academy
- Volunteers of America
- Women Marines Association
- WRBH Reading Radio
- Xavier University
- YMCA
- Young Leadership Council

Vice Admiral Diego E. Hernandez, (U.S.N. Retired)

His many distinguished military assignments include serving as Commander of the U.S. Naval Forces Caribbean and Deputy Commander in Chief U.S. Space Command. He joined the Board in 1997.

Donald P. Hodel, J.D.

He served under President Ronald Reagan as Secretary of the Interior and Secretary of Energy. His honors include the Presidential Citizens Medal. He joined the Board in 1997. After a two year leave of absence, he rejoined the Board in 2002.

Marvin L. "Buddy" Jacobs

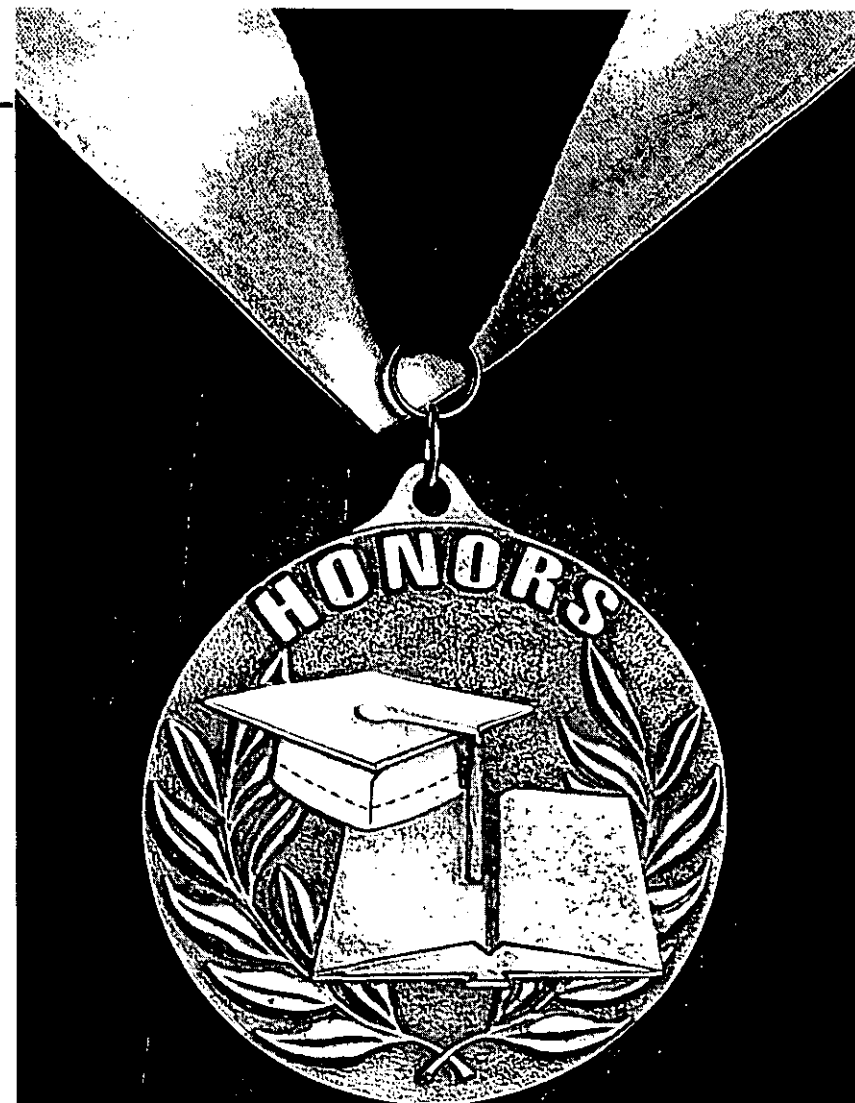
A prominent commercial real estate developer, he has been General Manager or Managing Partner of several companies. He joined the Board in 1985.

Carroll W. Suggs

Former Chairman of the Board and Chief Executive Officer of Petroleum Helicopters, Inc., she also serves on many corporate and charitable boards. She joined the Board in 1999.

Dr. James H. Wharton

He served as Chancellor of Louisiana State University and Agriculture & Mechanical College from 1981 to 1989. He remains a highly regarded professor and is Chancellor Emeritus of Louisiana State University. He continues a long tradition of volunteer service to the state and the university. He joined the Board in 2003.



Patrick F. Taylor Foundation Board of Trustees

Phyllis M. Taylor, LL.B.

Chairman and President

Mrs. Taylor has served as Chairman and Chief Executive Officer of Taylor Energy Company LLC since the death of her husband in 2004. Always involved in her husband's ventures, Mrs. Taylor was Executive Vice President and Board Member to Taylor Energy Company since its founding in 1979.

A graduate of Tulane University School of Law, Mrs. Taylor's law career began as a clerk for the Supreme Court of Louisiana and the Orleans Parish Civil District Court. Her move into the oil and gas industry began in 1972 when she accepted the position as in-house counsel for Texas oilman John W. Mecom, Sr. Always a partner in her husband's ventures, Mrs. Taylor became Vice President and Board Member to Taylor Energy Company in 1979. She held those positions until 2004.

Dedicated to philanthropy, Mrs. Taylor has been an active board member to numerous non-profit organizations. At the present, she serves on the Board of the Family Recovery Corps, the Greater New Orleans Foundation, the Women's Leadership Initiative of Greater New Orleans United Way, the Catholic Cultural Heritage Center, the Marine Corps Heritage Foundation, the New Orleans Business Council, the New Orleans Museum of Art, and the Congressional Medal of Honor Foundation. She is also a lifetime member of the Board of the New Orleans Ballet Association.

She has been awarded the Beverly Warner Award, the Dr. Robert McClean Award, the Governor's Arts Award, the Mayor's Arts Award, the Northwood Institute Distinguished Woman Award, the TOPS Award for the Institution of Human Understanding, and New Orleanian of the Year. She was a Top 50 Women of the Year recipient by New Orleans City Business, an honored guest of the U.S. Marine Corps Sunset Parade, a Young Leadership Council Role Model Honoree, a Contemporary Arts Center Sweet Arts Honoree, a Volunteer Activist for St. Elizabeth's Home, and the 1989 Philanthropist of the Year from the National Society of Fund Raising Executives.

Morrison C. Bethea, M.D.

Staff physician at Ochsner Hospital and Clinic and Clinical Professor of Surgery at Tulane School of Medicine and Health, Dr. Bethea is a leader in the field of cardiovascular disease, a consultant for Medical Affairs at Freeport-McMoRan Copper & Gold, Inc., a member of the Advisory Board of Directors to McMoRan Exploration Company, and co-author of *The New York Times* bestseller *Sugar Busters!* He joined the Board in 1994.

General Walter E. Boomer (U.S.M.C. Retired)

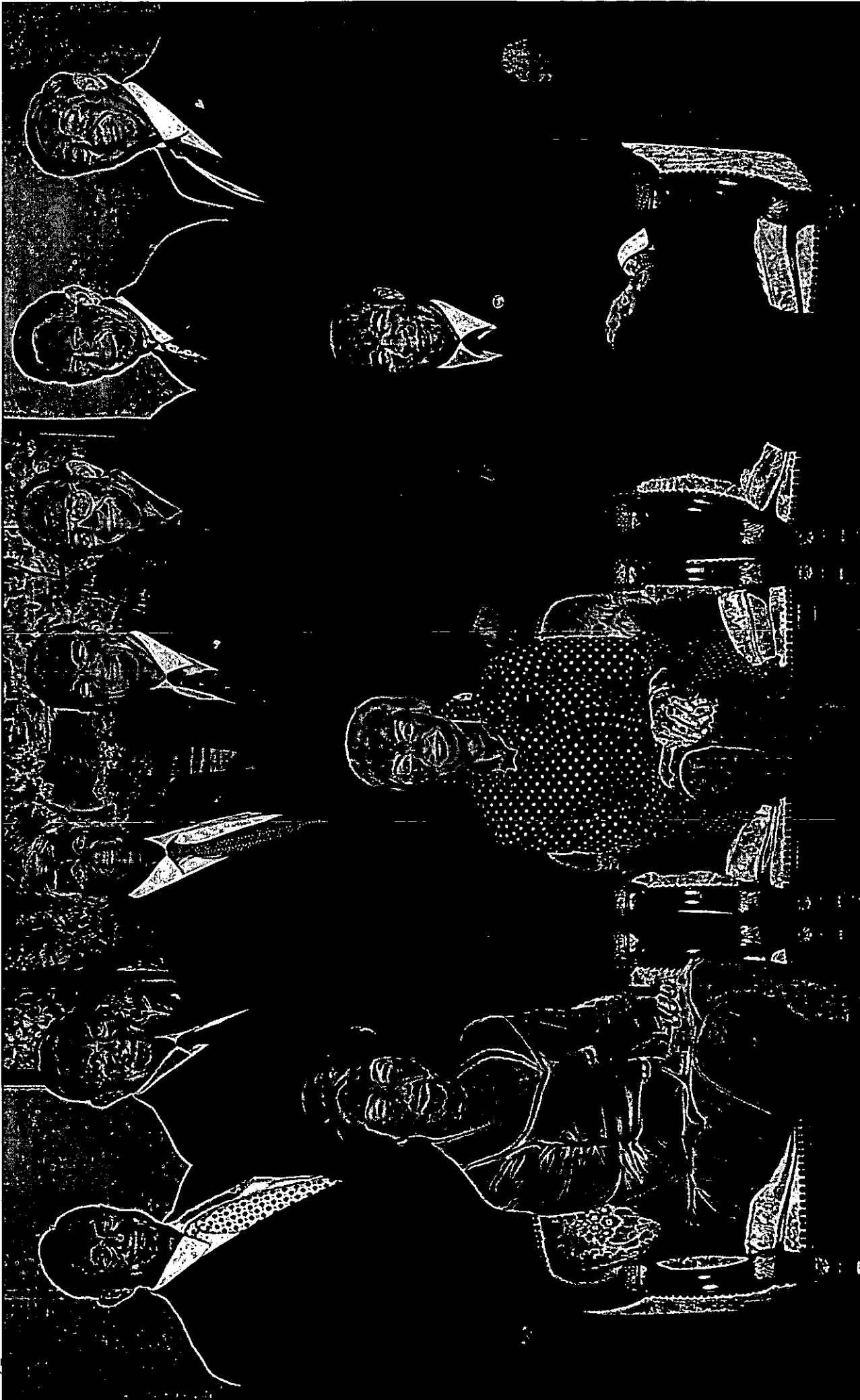
His distinguished military career spanned 34 years, until his retirement in 1994. He commanded all Marines in Operations Desert Shield and Desert Storm. General Boomer served as Chairman of the Board of Directors and CEO of Rogers Corporation from April 2002 until his retirement in 2004. He joined the Board in 1997.

Dr. James A. Caillier

Executive Director of the Patrick F. Taylor Foundation, Dr. Caillier is President Emeritus of the Louisiana University System. He joined the Board in 1997.

Former U.S. Ambassador Thomas C. Ferguson, J.D.

He served the Reagan and Bush Administrations as Ambassador to Brunei and Chief Operating Officer of the Immigration and Naturalization Services. He has been a Board Member since 1997.



Patrick F. Taylor Foundation Board of Trustees

(Back, left to right) Thomas C. Ferguson, Diego E. Hernandez, Morrison C. Bethea, Donald P. Hodel, James H. Wharton, Walter E. Boomer, Marvin L. Jacobs - (Front, left to right) Carroll W. Suggs, Phyllis M. Taylor, James A. Caillier

Patrick F. Taylor Foundation and the Armed Forces

National Museum of the Marine Corps at Quantico, Virginia

During his sophomore year at Louisiana State University, Patrick F. Taylor joined the Marine Corps PLC Officer Training Program. Unfortunately, a heart condition prevented his continued service, and he was honorably discharged in 1959. But Taylor's loyalty remained with the Marines. Throughout his life, he acted on the conviction that as citizens, we are bound to honor the men and women dedicated to protecting America's freedom.

In memory of Mr. Taylor's commitment to the Marines, the Foundation has funded a Patrick F. Taylor Observation Point at the National Museum of the Marine Corps in Quantico, Virginia. The Point serves as a reminder to future generations that as citizens, we, too, should honor the men and women of the U.S. armed forces.



Mrs. Taylor meeting with New Orleans Police Superintendent Warren Riley at a patriotic concert held in New Orleans after Hurricane Katrina.

Patrick F. Taylor Foundation and Law Enforcement

Patrick F. Taylor Foundation and Law Enforcement Appreciation Day

Since 1989, Mr. and Mrs. Taylor have hosted an annual celebration for Louisiana and Mississippi law enforcement officers at their ranch in Foxworth, Mississippi. The day is intended to thank officers for their loyal service and to provide an opportunity for them to come together in celebration of work well done. In addition to a congratulatory meal, the 1,500-plus officers are given an opportunity to test new weaponry and hear presentations about law enforcement advancements.

Patrick F. Taylor Foundation and Louisiana State Trooper Awards

During the late 1980s, Mr. Taylor, through the Foundation, pledged to honor state troopers who demonstrated exemplary service or performed extraordinary acts of bravery by awarding them a U.S. savings bond.

Patrick F. Taylor Foundation and the New Orleans Police Department

In 1987, when Mr. Taylor learned the New Orleans City Council could no longer afford to fund the New Orleans Police Department Awards, he began to purchase the officers' medals through the Foundation. To further honor the officers, U.S. savings bonds were also given. The Foundation continues the program today.

Pat Taylor Mobile Kitchen

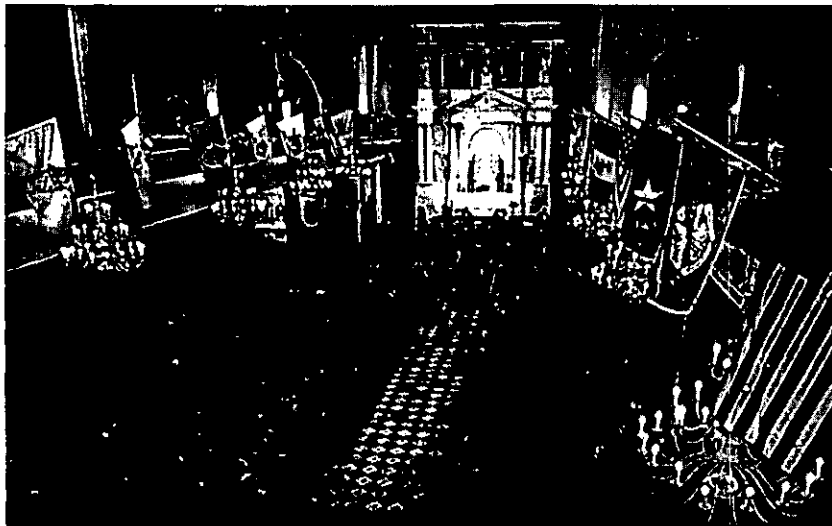
In the days and weeks that followed Hurricane Katrina, Mississippi troopers and other first responders struggled to protect and serve, often without the benefits of electricity, vehicles, communications, and other essential needs, including food. Now, to make certain Mississippi has the means to provide meals for the men and women serving during crisis, the Patrick F. Taylor Foundation has donated funds to the Mississippi Law Enforcement and Firefighter Katrina Relief Fund to create the Pat Taylor Mobile Kitchen. The Pat Taylor Mobile Kitchen and its ancillary equipment create a contained Special Emergency Response Ground Operations Unit for the Mississippi Department of Public Safety that will feed between 800 and 1,000 first responders at least two hot meals a day during a time of crisis.

The kitchen will be used in Mississippi and in other states in times of natural disaster and other catastrophic events.

Patrick F. Taylor Foundation and Hurricane Katrina Recovery Efforts

"New Orleans is more than a city; she is our home. It is up to us, her citizen-children, to restore her beauty and recreate her character. We must also recognize the tremendous opportunity before us to rebuild a city where equality of opportunity exists for all."

Phyllis M. Taylor



Post-Katrina patriotic concert held for New Orleans citizens in St. Louis Cathedral.

Following Hurricane Katrina, the Patrick F. Taylor Foundation and Taylor Energy Company LLC temporarily relocated to Lafayette, Louisiana. Although grateful for the hospitality extended by the Lafayette community, the Foundation was anxious to return to New Orleans and contribute to the city's rebuilding efforts. In the words of Mrs. Taylor, "We have a debt to pay." A debt she takes very seriously.

In January, Mrs. Taylor, her Company, and the Foundation returned to the city. In addition to making financial contributions to non-profit organizations engaged in rebuilding efforts, Mrs. Taylor encouraged New Orleans, a city rich in culture, to hope again. The Foundation sponsored a patriotic concert for citizens in St. Louis Cathedral, re-landscaped historic Lee Circle, and helped a charter school meet its payroll.

Under her leadership, the Patrick F. Taylor Foundation also ensured educational programs extant before the hurricane were available afterward. At a press conference held post-Katrina, New Orleans students came forward to express gratitude to the Patrick F. Taylor Foundation for ensuring the Taylor Scholars Awards Programs continued.

In the words of one student, "For years, [we] have utilized our Taylor Scholars Awards, taking for granted the opportunity to experience some of the most significant attractions our city possesses. It seemed on August 29th these indispensable gifts would be lost. . . . However, in only eight months [the Audubon Zoo, the Aquarium, and the New Orleans Museum of Art] are reopened, and the Taylor Scholars Awards live on. The award for the 2006-2007 year is more consequential than ever."

The students thanked Mrs. Taylor for the opportunity to witness firsthand the rebuilding of New Orleans' cultural centers.

Patrick F. Taylor Foundation and the City of New Orleans

Patrick and Phyllis Taylor have always held deep affection for the City of New Orleans and have long made the city their home.

During his life, Mr. Taylor made significant contributions to New Orleans. Following his death in 2004, Mrs. Taylor furthered their commitment to New Orleans, continuing programs begun by her husband and incorporating new initiatives of her own. *Listed below are some of the Foundation's major projects.*

Patrick F. Taylor Foundation and the Riverfront Streetcar Project

In 1988, the City of New Orleans began the Riverfront Streetcar Project. The project aimed at reinstating streetcars along the Riverfront in time for the Republican National Convention which New Orleans was set to host later that year. At that time, the city also hoped to bring streetcars back to historic Canal Street.

As a committed New Orleanian, Patrick Taylor took particular interest in the project. But as months passed, the utility poles ordered to complete the project failed to arrive. Taylor put the project back on track with a donation valued at \$1.2 million dollars. He provided poles made out of oil well casing. These "Taylor Poles" could support almost 600,000 pounds, perfect for the busy streetcars. The Riverfront streetcars ran in time for the convention, and the Canal streetcars followed. A streetcar was named after Mr. Taylor in gratitude for his donation.

Patrick F. Taylor Foundation and the Greater New Orleans Foundation

The Patrick F. Taylor Foundation, in addition to donating to the Greater New Orleans Foundation (GNOF) itself, places many of its personal endowments in the care of the GNOF. The GNOF is a community foundation whose funding comes from gifts from citizens. In return, the GNOF invests in deserving nonprofit organizations, thereby enhancing the quality of life of all citizens, both now and in the future, by building endowments. Because of that special community relationship, the Taylors have always supported the GNOF with their personal funds. In addition, Mrs. Phyllis Taylor serves on the Board of Directors.

Patrick F. Taylor Foundation and the Louisiana Endowment for the Humanities

Although this New Orleans organization sustained damage during Hurricane Katrina, the Louisiana Humanities Center will offer a Patrick F. Taylor Educational Center on its first floor. The Center encourages excellence in the humanities by offering teacher institutes, literacy courses, and other programs aimed at bringing the richness of the humanities to the State of Louisiana.

Patrick F. Taylor Foundation and the Sybil P. Gayman Endowment

In 2001, the Foundation established the Sybil P. Gayman Endowment in honor of Patrick F. Taylor's late mother. The endowment benefits WRBH Reading Radio 88.3 FM, a station for the blind. Mrs. Gayman, who died at age 91, suffered for 20 years with macular degeneration and eventually lost her vision. The Foundation honors Mrs. Gayman by helping others who suffer from blindness to continue to remain aware of current news and enjoy the arts through high-quality radio programming.

Patrick F. Taylor Foundation and the United Way for the Greater New Orleans Area's "Success By 6" Program

Research indicates the more enriched a child's environment, the greater the odds of future academic success. Therefore, the United Way, funded in part by the Patrick F. Taylor Foundation, has begun the "Success by 6" program. The program works to improve New Orleans childcare centers by moving instructors toward accreditation by the National Association for the Education of Young Children.

Patrick F. Taylor Foundation and Louisiana State University

Patrick F. Taylor always felt grateful to his alma mater, Louisiana State University and Agriculture & Mechanical College, for allowing him the opportunity to earn a degree in petroleum engineering. Consequently, Taylor made significant contributions to LSU and was a member of the LSU Board of Supervisors.

The Patrick F. Taylor Foundation recognizes the contributions of the flagship university to the state of Louisiana. The Foundation applauds Louisiana State University for excellence in teaching, research, and service.

The Foundation provides scholarships for LSU students, endowments for LSU professors, and funding for LSU research.

Patrick F. Taylor Endowments at Louisiana State University

The Foundation understands the importance of good teachers. Therefore, the following endowments for LSU professors have been established:

Patrick F. Taylor LSU Endowment Chair for the Environmental Impact of Hazardous Waste

In 1989, the Foundation established an endowment for the LSU Chair for the Environmental Impact of Hazardous Waste. The Foundation supports the university's plan to thrust LSU's Environmental and Coastal Programs into the national spotlight.

Phyllis M. Taylor Professorships in French at LSU

In 2001, the Foundation provided funds to the LSU Department of French Studies to endow 10 Phyllis M. Taylor Professorships in French. The State, through the Board of Regents Support Fund, provided a matching grant to bring the total endowment to \$1 million (present value \$1,134,000). The endowment provides funds to bring top faculty members to the LSU French Department and results in high-quality programming for students.

Patrick F. Taylor Scholarships at Louisiana State University

The Foundation applauds students striving for academic success. Upon the recommendation of each college's scholarship advisory board, the Foundation funds the following LSU student scholarships:

- ***Patrick F. Taylor Scholarship in Chemistry at LSU***
- ***Patrick F. Taylor Scholarship in Engineering at LSU***
- ***Patrick F. Taylor Scholarship in Geology & Geophysics at LSU***

Patrick F. Taylor believed any kid with drive
could "become somebody."

Students across the nation feel they are Taylor's greatest
legacy. The oilman from Texas understood
we cannot just ask students to work hard in school -
we must give them a reason why.



Patrick F. Taylor Foundation Student Scholarships

Patrick F. Taylor Scholarship for New Mexico's Taylor's Kids

In 1994, Mr. Taylor conceived and implemented a college scholarship program for students at Hondo Elementary in Hondo, New Mexico. Thirty-five 3rd and 4th graders from the class of 1993-1994 were selected for the program. Students who maintained a B cumulative grade point average at the end of each academic year throughout high school became eligible in this college scholarship program. Upon high school graduation, qualifying students received funds to pay for tuition and other related educational expenses.

Patrick F. Taylor Scholarship at Hondo High School

In 2006, the Patrick F. Taylor Foundation established a new scholarship program for graduating seniors from Hondo High School. In continuation of Mr. Taylor's vision, the scholarships award college tuition to students who have earned a 2.5 grade point average or better, a minimum ACT composite score of 20, and completed an advanced core curriculum.

Patrick F. Taylor Scholarship at Cabrini High School

Since 1988, two sophomores at Cabrini High School in New Orleans who have earned a 2.5 grade point average or better are awarded a \$1,500 need-based scholarship. The scholarship continues through the students' senior years as long as they maintain their eligibility.

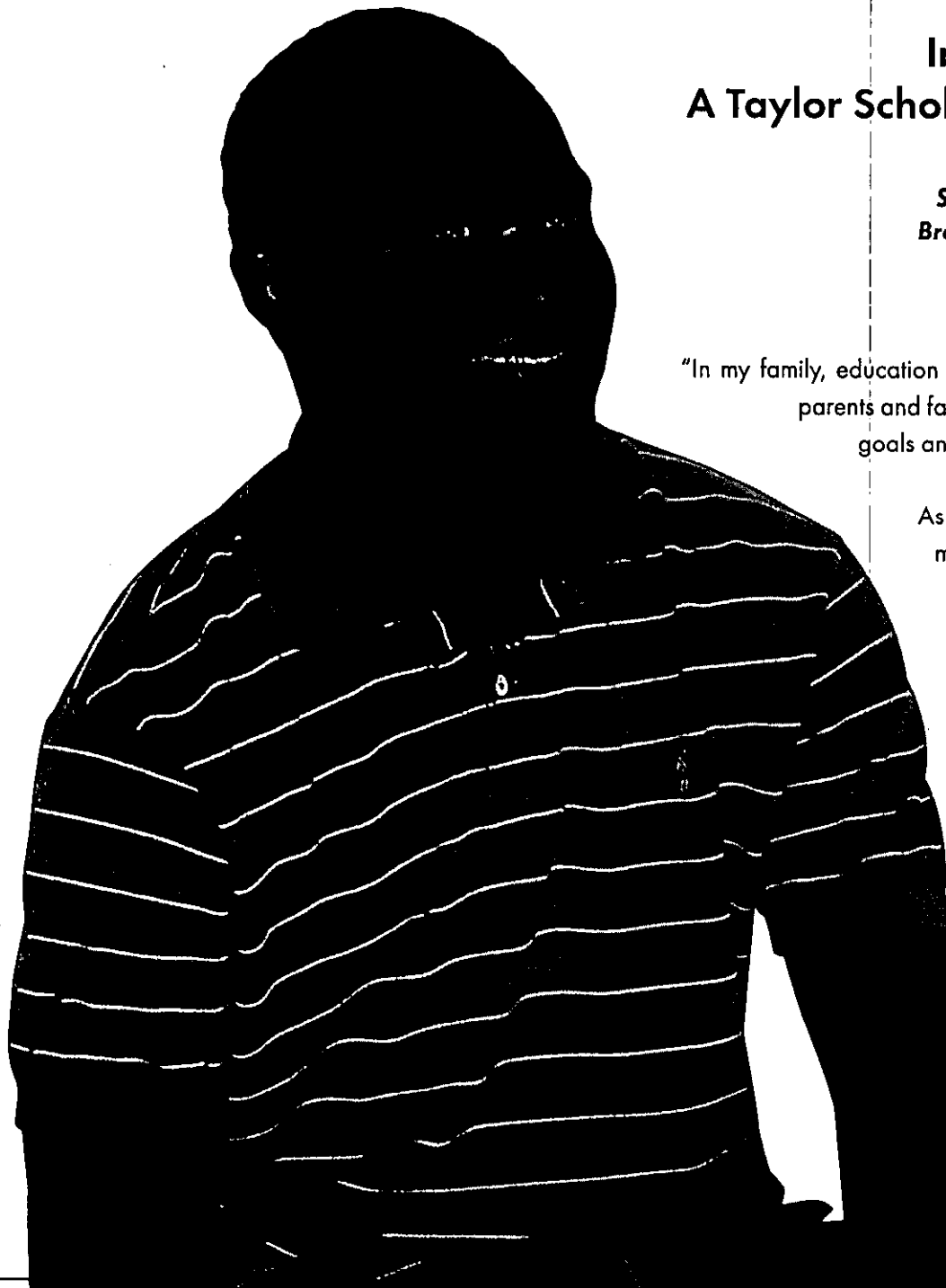
Patrick F. Taylor Scholarship at Cuero High School

In 1999, Lacey and Bridget Griffin, daughters of Taylor Energy Company employee Charles Russell, were tragically killed in an automobile accident. In honor of the girls, the Patrick F. Taylor Foundation established the Lacey and Bridget Griffin Scholarship in 2000.

The girls were honor students at Cuero High and Cuero Junior High Schools in Cuero, Texas. The Lacey and Bridget Griffin Scholarship is awarded annually to a graduating senior from Cuero High School who has earned a 2.5 grade point average or better, a minimum composite score of 20 on the ACT, and completed an advanced core curriculum. It is a one-time award given to the recipient upon high school graduation.

Individual Scholarships and Grants

The Patrick F. Taylor Foundation provides individual scholarships and grants to deserving students upon the recommendation of the Patrick F. Taylor Foundation Education Committee and approval by the Patrick F. Taylor Foundation Board of Trustees. All requests are submitted in writing and reviewed based on merit and need.



In His Own Words: A Taylor Scholar Recipient – Stephen Chaisson

*Stephen Chaisson is a 2006 graduate of
Brother Martin High School in New Orleans.*

"In my family, education has always been paramount. But I realize that my parents and family were not the only ones who helped me develop goals and standards for success.

As a recent high school student and now graduate, I made the decision to study for exams, get involved in extracurricular activities, and attend college. The Taylor Scholars Awards motivated me throughout my high school career through immediate rewards, such as free admission to the Audubon Zoo, Aquarium of the Americas, and the New Orleans Museum of Art. But also, the long-term goal of qualifying for TOPS (Louisiana's Tuition Opportunity Program for Students) encouraged me to work diligently in my studies.

I thank Mr. Patrick Taylor for kindling my desire and rewarding my drive for success."

Patrick F. Taylor Scholars Awards Programs

The Foundation is committed to providing students with a comprehensive educational experience. Therefore, the Taylor Scholars Awards Programs were created to offer "early scholars," Louisiana middle and high school students, enriched educational opportunities.

In addition, these programs act as tangible reminders to students—continued academic achievement will result in a state-paid college education.

- Both programs are fully funded and endowed by the Patrick F. Taylor Foundation to continue in perpetuity.
- All public, private, and parochial school students in Louisiana are eligible for participation in the programs.

Taylor/Audubon Students and Scholars Program

Created in 1996, the Taylor/Audubon Students and Scholars Program provides Louisiana students in grades seven through twelve with a grade point average of 2.5 or higher with a one year membership to the Audubon Aquarium of the Americas in New Orleans.

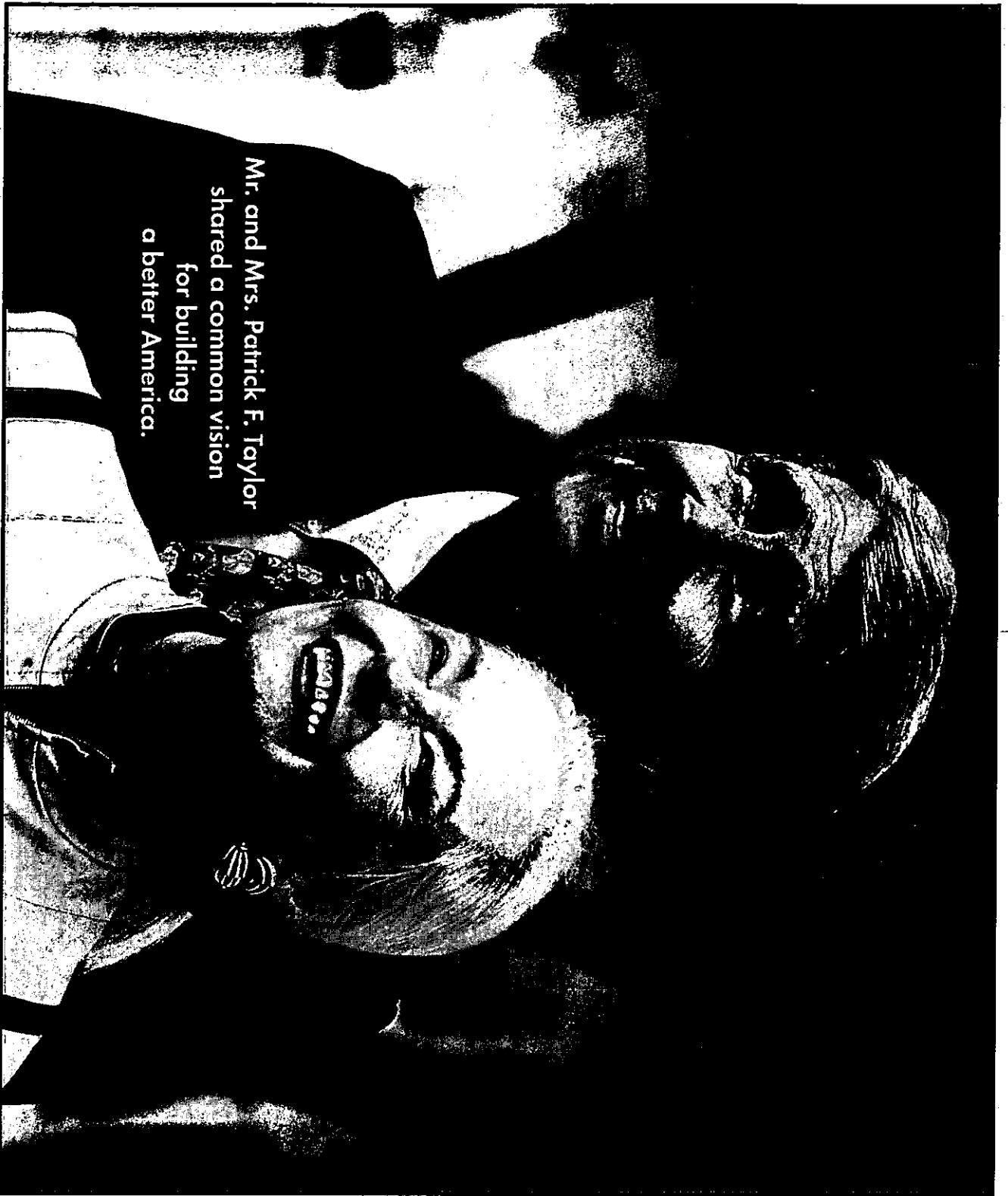
Students who earn a grade point average of 3.0 or higher also qualify for a one year membership to the New Orleans Audubon Zoo.

Taylor/New Orleans Museum of Modern Art Scholars Program

Created in 1997, the Taylor/New Orleans Museum of Arts (NOMA) Scholars Program provides Louisiana students in grades seven through twelve who earn a grade point average of 2.5 or higher with a one year membership to the New Orleans Museum of Art.

"This program continues to grow and touch the lives of many more young people. The educational opportunities that they will receive from their visits to the New Orleans Museum of Art and the Audubon facilities will expand their horizons and encourage them to continue their education."

Patrick F. Taylor



Mr. and Mrs. Patrick F. Taylor
shared a common vision
for building
a better America.

Patrick F. Taylor Foundation

Mr. and Mrs. Patrick F. Taylor started the Patrick F. Taylor Foundation in 1985 as a gesture of thanks to the nation that had given them so much.

The Patrick F. Taylor Foundation strives to build a better America.

Although best known for its work in education through promotion of the Taylor Plan, the Foundation also supports law enforcement, the military, and other humanitarian efforts.

*"There is no better way to raise the expectations of our families,
to motivate our kids, and to enthuse our teachers
than to offer hope in the form of a future."*

Patrick F. Taylor

In Her Own Words: A Taylor Plan Success Story – Suzanne Le Breton

Suzanne Le Breton is Assistant Managing News Editor for the St. Tammany News, a paper in Covington, Louisiana. The following excerpt from her article "The Gift of a Stranger" appeared in The News Banner on December 26, 2001.

"It's funny how a complete stranger can impact someone else's life without even knowing it.

One particular stranger had a great impact on my life—an impact that I took for granted until just recently. I recently reported on a speaker the Rotary Club had at its meeting. This speaker meant more than a story to me.

The speaker was Pat Taylor. If it weren't for Mr. Taylor, I probably would not be writing this column right now. I probably would not have my husband or have had my baby.

In March 1988, Patrick Taylor told 183 underachieving 7th and 8th grade students at Livingston Middle School in New Orleans East that if they maintained a B average and stayed out of trouble, he would see to it they attended college.

In March of 1988, I was in 5th grade, and I promise you, how I was going to pay for my college was the last thing on my mind. But thankfully, how Louisiana kids were going to pay for their college was the first thing on Mr. Taylor's mind.

In 1989, he convinced the Louisiana Legislature to pass a bill adopting the 'Taylor Plan.' ... I could not have afforded college without it. Oh, I could have applied for loans, but for fear of going into debt, I probably wouldn't have. My parents have three kids, and they wanted the best for us. These days the best involves getting a college education. I could not have gotten this job without my education, and I would not have met my husband if I had not gone to college.

As I sat there listening to Mr. Taylor speak, all of these things flashed through my mind. And all I can say is thank you for helping the many faceless children in Louisiana, and I promise to use the education that Mr. Taylor fought so hard for me to have."



The Taylor Plan's Record of Success

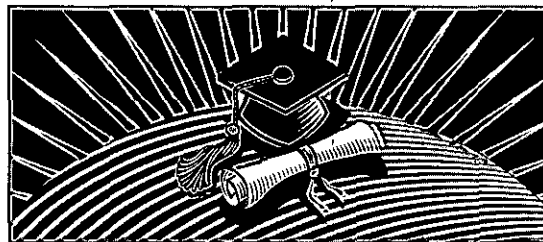
The first Taylor Plan was initiated in Louisiana in 1989. The Louisiana Taylor Plan, known in the state as TOPS (Tuition Opportunity Program for Students), has a proven track record of success.

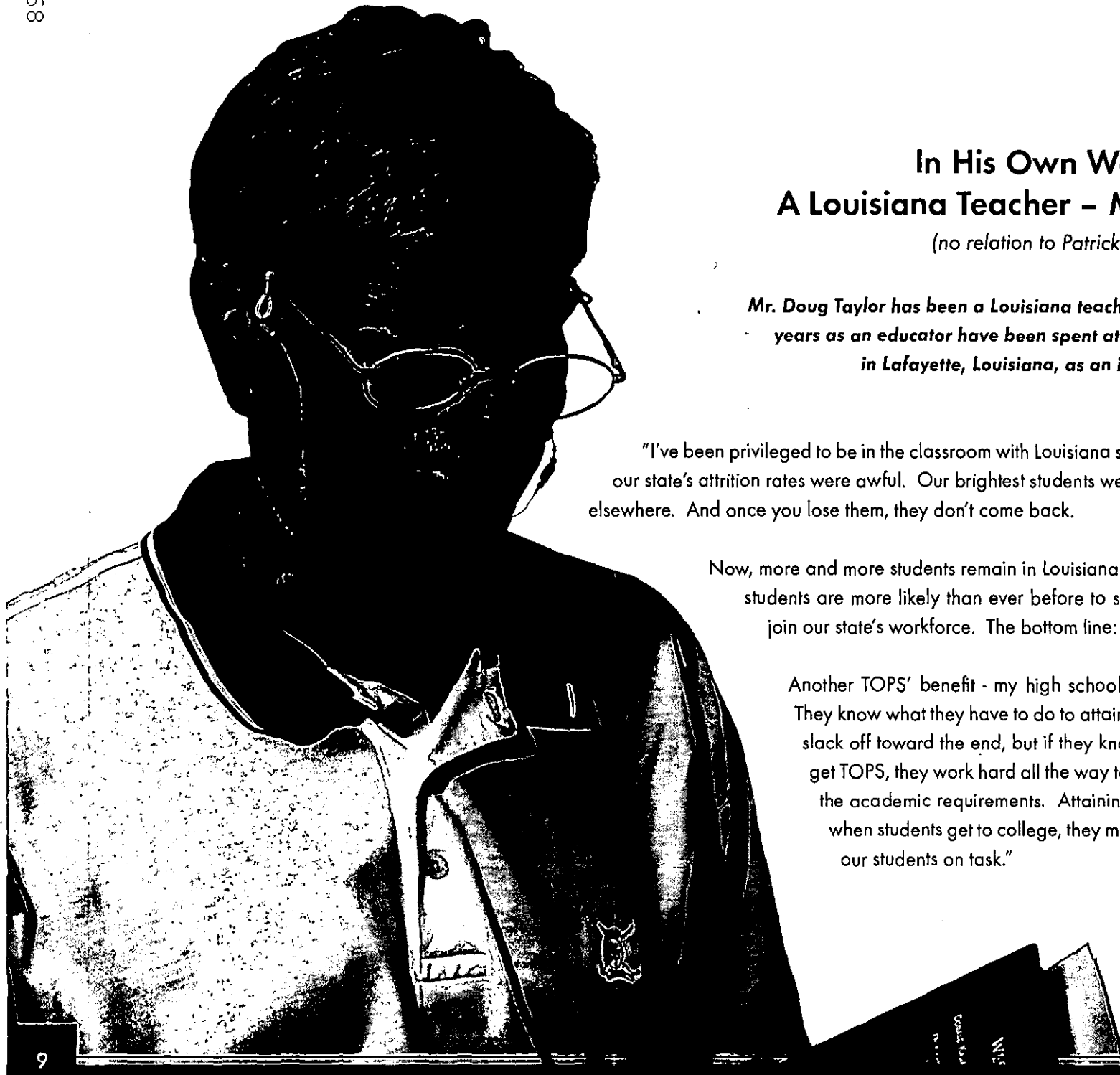
Research conducted by the Louisiana Board of Regents indicates:

- Students who take the TOPS core curriculum in high school score significantly better on standardized tests.
- The number of first-time freshmen with TOPS enrolling in public postsecondary institutions has increased.
- The number of high school graduates leaving Louisiana for postsecondary education has decreased.
- A large number of students with higher standardized test scores are remaining in Louisiana to attend college.
- Students receiving a TOPS award persist in college at a higher rate than non-TOPS students.
- More students with TOPS graduate from college in a shorter period of time than non-TOPS students.

Additionally,

- College entrance requirements have increased across the state.
- Louisiana's flagship school, Louisiana State University and Agriculture & Mechanical College, no longer offers remedial courses, saving the state thousands of taxpayer dollars.
- When the Taylor Plan was initiated in 1989, the average ACT score of entering LSU freshmen was a 19. Today, LSU freshmen average a 24.
- LSU has gone from open enrollment to requiring a 3.0 high school grade point average and an ACT score of 22.





In His Own Words: A Louisiana Teacher – Mr. Doug Taylor

(no relation to Patrick F. Taylor)

Mr. Doug Taylor has been a Louisiana teacher for over 25 years. Most of his years as an educator have been spent at St. Thomas More High School in Lafayette, Louisiana, as an instructor of history.

"I've been privileged to be in the classroom with Louisiana students for over 25 years. Before TOPS, our state's attrition rates were awful. Our brightest students were leaving to pursue college educations elsewhere. And once you lose them, they don't come back.

Now, more and more students remain in Louisiana for college. Our smartest, most diligent students are more likely than ever before to stick around after university training and join our state's workforce. The bottom line: TOPS keeps students at home.

Another TOPS' benefit - my high school seniors are more motivated than ever. They know what they have to do to attain the award. Seniors have a tendency to slack off toward the end, but if they know they have to keep their grades up to get TOPS, they work hard all the way to graduation. Parents, too, are aware of the academic requirements. Attaining TOPS is a household goal. And then, when students get to college, they must continue to achieve. TOPS is keeping our students on task."



ing to
Mrs. Patrick F. Taylor
speaks with the original
Taylor's Kids in 1988.

The Taylor Plan

"Students are not dropping out because it's too hard, but because it's too easy."

Patrick F. Taylor

Objective:

The Taylor Plan sets the standards for student achievement in high school, offering students a state-funded, merit-based opportunity to attend college or vocational/technical school. The Plan is a contract between students and state - students can earn up to a four-year, state-paid college tuition if they meet specified criteria.

Criteria:

The Taylor Plan is three-pronged: Students must take a specific core curriculum, make the required standardized test score, and meet grade point average requirements.

1. Curriculum

A college preparatory high school core curriculum, one both rigorous and appropriate, is necessary to fully prepare students for the challenges of college. The goal is to ensure high school graduates are college ready and graduation oriented.

The ideal high school core curriculum will include:

Units	Courses
4	<i>English</i>
4	<i>Mathematics</i>
4	<i>Social Studies</i>
4	<i>Science</i>
2	<i>Foreign Language</i>
1	<i>Fine Arts</i>
.5	<i>Computer Science</i>
19.5	<i>Total</i>

2. Standardized Test Scores

The Taylor Plan requires a student's ACT or SAT composite score to be at or above the state average.

3. Grade Point Average

A student's high school grade point average must demonstrate reasonable academic success. Therefore, the Taylor Plan requires a minimum 2.5 grade point average.

4. Vocational/Technical School

Students interested in pursuing careers requiring vocational or technical training are also able to earn a state-funded, merit-based opportunity to attend vocational/technical school.

College Eligibility:

The main focus of the Taylor Plan is college graduation, not simply enrollment. Therefore, to remain eligible, a student must achieve an appropriate level of academic success in college.

- *Students must maintain full-time status.*
- *At the end of year one, a student must earn a 2.3 minimum cumulative grade point average.*
- *At the end of years two through four, a student must earn a 2.5 minimum cumulative grade point average.*
- *Students must earn a minimum of 24 credit hours per academic year.*
- *The plan encourages students to graduate in four years (eight semesters).*

The Taylor Plan Is Born

March 16, 1988, should have been an ordinary day for Patrick Taylor. In addition to performing the regular tasks associated with running a major oil and gas company, he was scheduled to address a group of students from inner city New Orleans. Although the invitation to speak at Livingston Middle School was certainly an honor, Patrick F. Taylor, a man generous to the community, had delivered many "role model" speeches before. But call it fate, providence, or even luck, March 16th would alter the course of Patrick Taylor's life and the lives of students across the nation.

It started with a question: How could Patrick Taylor motivate his audience, a group of 183 underprivileged, underachieving 7th and 8th graders? He knew he had to do more than flash a Rolex and talk about his own impoverished background and current oil field success. He had to make the kids a deal. Pat Taylor was good at making deals.

He decided "to offer them the only choice that I felt they could not refuse, the only choice that works—the choice of whether or not they could go to college." After all, these were not just any 7th and 8th graders. These were largely repeat 7th and 8th graders; these were largely 15- and 16-years-old 7th and 8th graders; these were largely kids who had given up on education because they believed education had given up on them.

Taylor was convinced America's low-income youth were growing up thinking that college was "for other folks." After researching further, he discovered that three-quarters of Louisiana families could not afford a college education for their children. He also knew those statistics were not unique to the state. And so, Patrick Taylor, once just a penniless student himself, decided to act.

It started with an offer to the original 183 "Taylor's Kids." He promised to pay their way through college if they would take college preparatory courses, maintain a B average, and stay out of trouble. It evolved into a statewide legislative campaign to ensure all Louisiana students had access to a free college education.

The "Taylor Plan," always merit based, proposed state-paid tuition at any Louisiana public university for students who earned a sufficient ACT score and a 2.5 grade point average in specified core courses. Convinced the scholarship should be based on merit alone, Taylor pushed successfully for the income requirement to be removed.

Although the Louisiana legislative battle was fierce, Act 789 (Tuition Assistance Program), was signed into law on July 10, 1989. No one fought harder or felt prouder than Patrick F. Taylor. His new "role model" message: You can go to college. It's not just a promise. It's the law.

The original Taylor Plan was known as TAP (Tuition Assistance Program) in Louisiana. It was a merit-based tuition program for students whose annual family income did not exceed \$25,000 (with provisions for additional children). In 1997, all academic award programs were combined under TOPS (Tuition Opportunity Program for Students), and the income cap was removed. Today, every student in Louisiana has the opportunity to earn college tuition while in high school, regardless of family income.

State-paid, merit-based aid is now well accepted and supported in the United States as a means of challenging students to work harder and meet higher standards. By qualifying for the Taylor Plan, students are prepared for college, graduate in larger numbers and in a shorter period of time.

Taylor's revolutionary approach caught the attention of *60 Minutes* correspondent Mike Wallace. Wallace featured Taylor and his "Kids" twice, in 1989 and 1990, prompting other states to find out what was happening down South. Patrick Taylor was only too happy to bring his ideas elsewhere. By the time of his death in 2004, more than 40,000 Louisiana students were attending college on TOPS, and more than 20 states had adopted versions of the Taylor Plan.



YOU CAN GO TO COLLEGE.

It's not just a promise. It's the law.

Mr. Patrick F. Taylor speaking on
the passage of the Taylor Plan in Louisiana,
the first merit-based college tuition plan in the nation.

The Patrick F. Taylor Story

"You will understand me better if you look upon me not as a rich man, but as a poor boy."

Patrick F. Taylor

In 1955, a poor young man from Texas was given an incredible opportunity—the chance to attend Louisiana State University tuition free. That young man, Patrick F. Taylor, graduated three-and-a-half years later with a degree in petroleum engineering, an eye for oil, and a mission to ensure all young people have an opportunity for a college education.

Although his life was in many ways the American Dream come true, Patrick Taylor did not believe in the self-made man. Keenly aware of the important role others had played in his own success, Taylor felt instead that individual achievement was the product of personal drive blessed by good fortune. He sought to be a bit of that good fortune for others.

True, Patrick Taylor was a modern-day pioneer in the petroleum industry. The company he started in 1979, Taylor Energy Company, remains the only independently owned oil company ever to explore for and produce oil and natural gas in federal waters, but his real passion was always with America's children.

Burdened by the knowledge that many young people believed the system had forgotten them, Patrick Taylor sought opportunities to make a difference in the lives of America's kids. That mission received national attention when he promised to send 183 underprivileged, underachieving 7th and 8th graders, affectionately dubbed "Taylor's Kids," to college if they engaged in rigorous study, maintained a B average, and stayed out of trouble. A man of integrity, he was true to his word.

But Patrick Taylor never thought small. What began as a promise to 183 inner city New Orleans students became a statewide legislative campaign to ensure all Louisiana young people had the opportunity to attend college. And after the first "Taylor Plan" became law in Louisiana in 1989, Mr. Taylor took his Plan to other states. By the time of his death in 2004, the children of more than 20 states thanked oilman Patrick Taylor for guaranteeing their opportunity to a college education.

The Patrick F. Taylor Foundation honors the legacy of its founder, a true American hero, who sought equality of opportunity for all.

Mission

The mission of the Patrick F. Taylor Foundation
is to promote the common good and well-being of all people of our nation,
primarily by promoting universal and unlimited educational opportunities
based solely on each individual's demonstrated ability and willingness to learn.



Building a Better America



At the Patrick F. Taylor Foundation, we celebrate the promise of America, a nation still rich in courage, valor, and grit. We are a land of dreamers whose vision of the future is ripe with opportunity. And as always, in the dreams of our children, we find the most beauty.

Patrick F. Taylor, an oilman who once had dreams of his own, believed in America's youth. He understood that bright futures stand on the sturdy legs of education. And so he worked to guarantee that the opportunity to go to college be based on a child's ability to learn, not the ability to pay.

His vision, known as the Taylor Plan, became law in Louisiana in 1989. By the time of his death in 2004, 20 additional states had adopted merit-based college tuition plans.

We at the Foundation are proud of my late husband's legacy, but we recognize that his work is far from finished. Barriers still remain between our children and the attainment of their goals. It is our duty to raze these walls and to create equality of opportunity for all.

It begins with a pledge to our children: If you will study, if you will take challenging courses, if you will succeed, then you will have access to college and a meaningful future.

We begin with our children, but we do not end there. The Patrick F. Taylor Foundation works with America's leaders to ensure America's law reflects America's promise. The communities we call home must be resilient, vibrant, and strong. To harvest prosperity we must plant opportunity, integrity, diligence, justice, and soul.

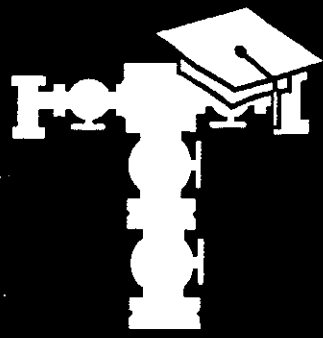
The Foundation's attention, therefore, reaches beyond the classroom to centers of art and history, law enforcement, and the armed forces. We work to ensure that America grows better, safer, and stronger with each passing hour.

Our duty is clear, our resolve is strong, and our path is lit by the hope that together, we will make a difference.

Mrs. Phyllis M. Taylor
Chairman and President

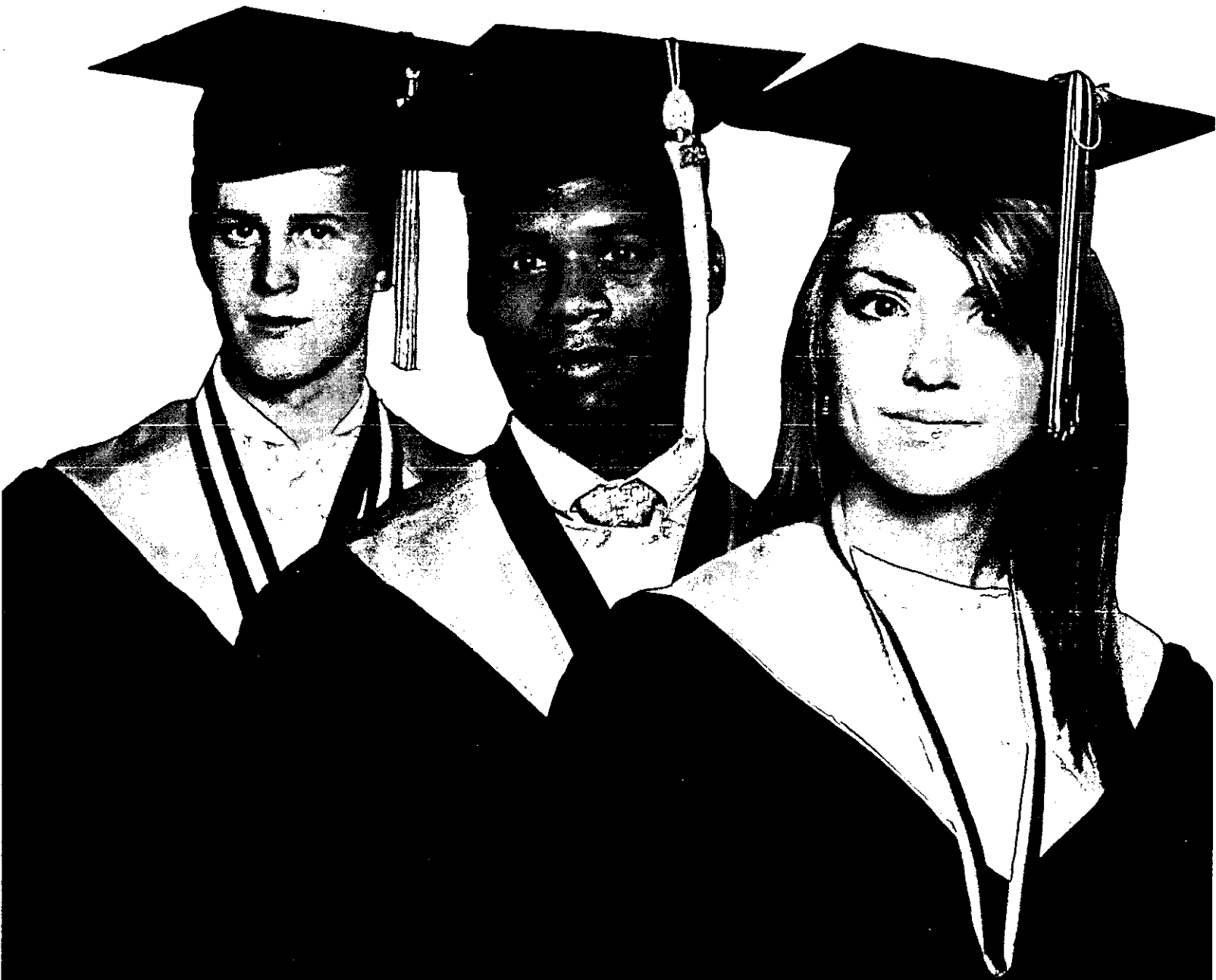
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PATRICK F. TAYLOR FOUNDATION

THINK "TOPS"



PATRICK F. TAYLOR FOUNDATION

TOPS FACTS

In 1989, the original Louisiana Taylor Plan became law as a result of Mr. Patrick F. Taylor's educational initiatives. Governor Roemer signed ACT 789 into law creating the first state-funded, merit-based college tuition program in the country called the Louisiana College Tuition Plan (LCTP). Students were required to earn 17.5 units in the core curriculum, score a minimum 18 composite score on the ACT, and earn a 2.5 grade point average. In 1992, the program was renamed the Tuition Assistance Plan (TAP) by ACT 887 and ACT 718. Both programs had an income cap.

In 1997, Governor Foster signed into law ACT 1375 and ACT 287 changing TAP to the Tuition Opportunity Program for Students (TOPS). The income cap was removed, the program was broadened and the core curriculum was adjusted to 16.5 units. With this law all Louisiana students became eligible for awards based on their academic performance.

In 2001, Governor Foster signed ACT 1202 which provides the Governor, Legislature, and public with an annual evaluation of the TOPS Program. In addition, the data collected provides indicators on how effective individual high schools are preparing their graduates for college or entry into workforce training.

WHAT IS TOPS?

Louisiana's Tuition Opportunity Program for Students (TOPS) is a comprehensive program of state scholarships and one of the most innovative and progressive student assistance programs in the nation.

CRITERIA FOR ELIGIBILITY:

- Students must take a specific core curriculum (17.5 units)
- Make the required standardized test score (20 ACT or 940 SAT)
- Meet grade point average requirements (2.5 minimum GPA in core curriculum)
- Students enrolled in technical and community college are also eligible under different criteria
- TOPS recipients must meet certain established requirements to maintain award

BEFORE TOPS:

- Open admissions to all public universities (LSU in 1988)
- Over 50% entering freshmen required remedial courses
- Low college graduation rate and excess time to graduate

PURPOSE OF TOPS:

- To provide financial incentives as a reward for good academic performance
- To promote academic success by requiring completion of a rigorous high school core curriculum
- To keep Louisiana's best and brightest in the state to pursue postsecondary educational opportunities

HIGH SCHOOL PERFORMANCE:

According to the 2007 TOPS Reporting System to the House Education Committee by the Board of Regents

Eligible for TOPS

HS Graduating Year	Graduates	With TOPS Core	Eligible for TOPS	% Enrolled with TOPS
2003	45,226	25,546	14,797	83%
2004	44,569	26,111	14,961	91%
2005	43,012	26,951	15,273	83%
2006	40,981	26,487	15,115	88%
2007	41,370	27,230		

- Of the 44,569 high school graduates in the 2004 graduating class, 26,111 graduates (58.6%) completed the TOPS core curriculum
- 14,961 of the graduates (33.6%) were eligible to receive a TOPS award.
- 13.2% of the entering college class left Louisiana in 1996. Only 9% left in 2002
- The number of first time freshmen with TOPS enrolling in public postsecondary education continues to increase

ACT AVERAGE			
2003 Graduates	19.6	19.8	2004 Graduates
Less than core	16.2	16.5	Less than core
With core	21.1	21.7	With core
Met TOPS requirements	23.8	23.8	Met TOPS requirements

Note: Not including TOPS Tech core/requirements

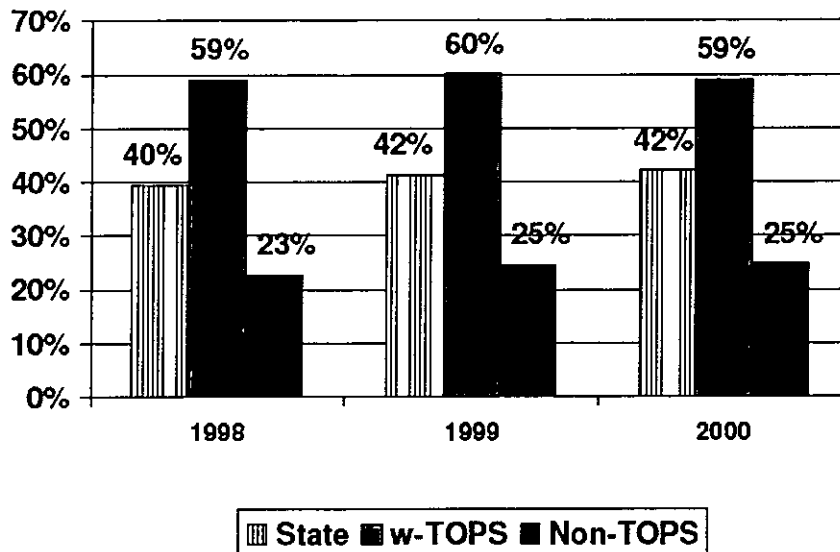
- TOPS students score significantly higher than non-TOPS students on the ACT
- ACT composite score increases are the result of increased number of students completing the core and increased numbers meeting the TOPS requirements
- A larger number of students with higher ACT scores are remaining in Louisiana to attend college

TOPS RECIPIENTS VS. NON-TOPS STUDENTS:

According to the 2007 TOPS Reporting System to the House Education Committee by the Board of Regents

- 59% of TOPS students at four-year institutions graduate within six years
- Non-TOPS students graduate at a 25% rate within six years

Graduating: 6-year Rate Baccalaureate Degrees



*TOPS Opportunity, Performance, or Honors Award
Not including TOPS Tech*

*Source: LOSFA, Regents
Public 4-year Universities*

- Students who enrolled with TOPS in 2003 remained in school for the second year at a rate of 88%
- Students who enrolled without TOPS in 2003 remained in school for the second year at a rate of 66%
- 77% of those enrolled in 2003 TOPS students were still in college by the fourth year, as opposed to only 42% of their non-TOPS counterparts.
- Students receiving a TOPS award persist in college at a higher rate than non-TOPS students
- Students receiving TOPS graduate from college at a higher rate and in a shorter period of time than non-TOPS students

COST OF TOPS:

Statistics are from TOPS Payment Summary on www.osfa.state.la.us

TOPS EXPENDITURES BY YEAR

Academic Year	Number of Students	General Fund	Tobacco Fund	Total Expenditures
1989-1990	528	\$782,280	-0-	\$782,280
1990-1991	1,152	\$1,966,232	-0-	\$1,966,232
1991-1992	1,459	\$2,486,393	-0-	\$2,486,393
1992-1993	1,809	\$3,472,436	-0-	\$3,472,436
1993-1994	1,889	\$3,892,929	-0-	\$3,892,929
1994-1995	2,114	\$4,379,408	-0-	\$4,379,408
1995-1996	2,312	\$4,667,019	-0-	\$4,667,019
1996-1997	2,728	\$5,693,320	-0-	\$5,693,320
1997-1998	2,996	\$6,395,328	-0-	\$6,395,328
*1998-1999	23,509	\$54,031,499	-0-	\$54,031,499
1999-2000	29,120	\$67,441,004	-0-	\$67,441,004
2000-2001	35,726	\$90,021,795	\$222,786	\$90,244,581
2001-2002	40,856	\$102,228,429	\$1,779,677	\$104,008,107
2002-2003	40,114	\$90,920,887	\$13,684,158	\$104,605,045
2003-2004	41,042	\$98,594,051	\$11,897,686	\$110,491,738
2004-2005	42,451	\$102,882,735	\$14,149,050	\$117,031,785
2005-2006	42,468	\$101,642,413	\$15,136,282	\$116,778,695
2006-2007	43,534	\$103,302,239	\$17,146,878	\$120,449,117
TOTAL	**355,807	\$844,800,397	\$74,016,517	\$918,816,916

* TAP changed to TOPS. Income cap was removed enabling all eligible students to receive TOPS

** Duplicated count

Total number of students who have received TOPS since its inception: **148,500**

(5,623 are students whose scholarships converted to TOPS scholarships at the inception of TOPS)

Please note that the Tobacco Fund continues to grow causing a decrease in the state General Fund Contributions. Also note that the number of TOPS students is increasing slowly, almost to a level number.

AFFORDABILITY:

According to *Measuring Up 2006: The State Report Card on Higher Education* a study conducted by The National Center for Public Policy and Higher Education.

The affordability category measures whether students and families can afford to pay for higher education, given income levels, financial aid, and the types of colleges and universities in the state.

- Louisiana received an F in affordability

A CLOSER LOOK AT FAMILY ABILITY TO PAY	Average family income	Community colleges		Public 4-year colleges/universities		Private 4-year colleges/universities	
		Net college cost*	Percent of income needed to pay net college cost	Net college cost*	Percent of income needed to pay net college cost	Net college cost*	Percent of income needed to pay net college cost
Income groups used to calculate 2006 family ability to pay							
20% of the population with the lowest income	\$9,668	\$4,474	46%	\$5,191	54%	\$22,168	229%
20% of the population with lower-middle income	\$24,000	\$5,202	22%	\$6,190	26%	\$22,060	92%
20% of the population with middle income	\$38,967	\$5,845	15%	\$7,363	19%	\$21,772	56%
20% of the population with upper-middle income	\$60,460	\$6,005	10%	\$7,399	12%	\$21,520	36%
20% of the population with the highest income	\$104,300	\$6,040	6%	\$7,418	7%	\$22,008	21%
40% of the population with the lowest income	\$16,834	\$4,838	29%	\$5,691	34%	\$22,114	131%

*Net college cost equals tuition, room, and board, minus financial aid.

- TOPS reduces the unmet financial need
- TOPS has contributed significantly to increasing the number of college graduates per year which provides much greater productivity per unit cost for the tax payers of the state
- If Louisiana's goal is to increase the number of college graduates, we need better prepared students and to keep tuition at an affordable cost

*Please note that in 2006 the **Go Grant** was approved to address the unmet needs of post secondary students. However, the **Go Grant** needs to be revisited; it has no academic requirements, it is too broad, and lacks accountability.*

PAR RECOMMENDS:

LOUISIANA CONTINUES FULLY FUNDING TOPS TO KEEP PACE WITH TUITION INCREASES

According to the May 2007 Report by Public Affairs Research Council of Louisiana, Inc.

PAR states: "TOPS was designed as a program to fully cover the cost of tuition and some fees for each eligible student regardless of the expense. At its inception, TOPS was designed to grow with increased student enrollment and increases in tuition and required fees. However, as it has evolved, not all required fees have been covered. Nearly all new fees that have received legislative approval in recent years have been exempted from TOPS. Continuing this practice would limit growth in TOPS funding, but also would seem to dilute the original intent of the program."

TOPS SUMMARY:

According to the 2007 TOPS Reporting System to the House Education Committee by the Board of Regents

TOPS is challenging students to work harder in high school and making them better prepared for college. Parents are paying greater attention to school work and grades. Universities are now in a position to establish fixed admission requirements; therefore, reducing the need for remedial courses.

- Students who take the core curriculum score significantly better on the ACT.
 - More students in the recent graduating class took the core and more have been determined eligible for TOPS.
 - TOPS has contributed significantly to the reduction in remedial courses.
 - The majority of students receive an Opportunity Award and enroll in a public four-year university.
 - The number of first time freshmen with TOPS enrolling in public postsecondary education has increased.
 - 91% of the entering college class stays in Louisiana to pursue their college education.
-
- A larger number of students with higher ACT scores are remaining in Louisiana to attend college.
 - More students with TOPS graduate from college in a shorter period of time than non-TOPS students ultimately saving the cost of tuition and state support.
 - TOPS eligible students are attending universities with higher admission standards in greater numbers than institutions with lower admission standards. *(see appendix)*

Consideration of the increased access to college, the reduction in remedial enrollment, the reduced time to graduate and the increased number of graduates strongly indicates the TOPS Program is a major success story, one in which Louisiana leads the nation:

Appendix

TOPS Payment Summary by Award Level for Academic Year 2006-07 as of 12/13/07

School	Opportunity		Performance		Honors		Tech		National Guard		Total		Percentage by School	
	#	\$	#	\$	#	\$	#	\$	#	\$	#	\$	#	\$
Nicholls	1,299	2,945,031	377	1,063,283	167	534,845	0	0	150	1,843	4,543,308	4.23%	3.77%	
Grambling	180	432,134	17	51,510	1	3,430	0	0	150	198	487,224	0.45%	0.40%	
La. Tech	1,999	5,355,232	740	2,398,260	526	1,916,178	0	0	1,600	3,265	9,671,270	7.50%	8.03%	
LSU-BR	7,488	23,349,660	2,804	10,052,136	2,917	11,640,849	0	0	5,100	13,209	45,047,745	30.34%	37.40%	
LSU-A	252	484,278	57	146,067	24	68,731	0	0	0	333	699,076	0.76%	0.58%	
LSU-E	355	451,581	78	147,218	29	61,171	34	40,425	0	496	700,394	1.14%	0.58%	
LSU-S	496	1,157,853	162	464,929	62	210,094	0	0	0	720	1,832,876	1.65%	1.52%	
LSUMC-NO	96	257,636	60	197,560	35	119,798	0	0	0	191	574,994	0.44%	0.48%	
LSUMC-S	6	17,864	6	23,592	7	21,118	0	0	0	19	62,574	0.04%	0.05%	
UNO	1,522	4,078,703	352	1,142,346	175	634,173	0	0	450	2,049	5,855,672	4.71%	4.86%	
McNeese	1,541	3,490,321	436	1,220,448	190	615,477	0	0	900	2,167	5,327,146	4.98%	4.42%	
ULM	1,378	3,147,916	510	1,432,737	262	879,656	0	0	150	2,150	5,460,459	4.94%	4.53%	
NW	1,229	2,910,536	399	1,144,864	158	510,675	0	0	1,350	1,786	4,567,426	4.10%	3.79%	
SE	2,983	6,854,678	662	1,901,690	230	771,833	0	0	2,100	3,875	9,530,300	8.90%	7.91%	
Southern-BR	538	1,317,403	90	266,640	15	45,193	0	0	300	643	1,629,536	1.48%	1.35%	
Southern-NO	8	13,619	0	0	1	3,006	0	0	0	7	16,625	0.02%	0.01%	
Southern-S	30	42,957	0	0	0	0	4	5,944	0	34	48,901	0.08%	0.04%	
ULL	3,613	8,043,943	1,069	2,893,122	497	1,575,792	0	0	1,200	5,179	12,514,057	11.90%	10.39%	
Delgado	290	403,935	29	51,005	1	2,189	130	165,531	0	450	622,660	1.03%	0.52%	
South La. C C	53	66,822	9	12,033	0	857	0	0	0	62	79,712	0.14%	0.07%	
BR Community C.	339	416,252	13	24,102	0	1,127	53	63,976	300	405	505,757	0.93%	0.42%	
Bossier Parish CC	180	225,108	25	44,134	3	5,834	108	132,798	600	316	408,474	0.73%	0.34%	
Delta CC	11	15,620	2	1,962	0	0	19	26,554	0	32	44,136	0.07%	0.04%	
Nunez CC	19	20,616	0	0	0	0	9	12,528	0	28	33,144	0.06%	0.03%	
River Parishes CC	51	68,072	5	8,368	1	1,246	0	0	0	57	77,686	0.13%	0.06%	
L E Fletcher CC	43	48,310	3	3,987	0	0	68	64,027	0	114	116,324	0.26%	0.10%	
Sowella Tech CC	38	53,696	5	10,857	0	0	68	78,293	0	111	142,846	0.25%	0.12%	
LTC-Acadian Campus	4	2,507	0	0	0	0	1	586	0	5	3,093	0.01%	0.00%	
LTC-Alexandria	2	1,172	0	0	0	0	2	879	0	4	2,051	0.01%	0.00%	
LTC-Ascension	4	2,344	3	3,451	0	0	11	7,564	0	18	13,359	0.04%	0.01%	
LTC-Avoynes	2	1,009	0	0	0	0	4	1,244	0	6	2,253	0.01%	0.00%	
LTC-Baton Rouge	4	4,074	0	0	0	0	10	5,464	0	14	9,538	0.03%	0.01%	
LTC-Bastrop	2	828	0	0	0	0	1	552	0	3	1,380	0.01%	0.00%	
LTC- Sidney Collier	0	0	0	0	0	0	0	0	0	0	0	0.00%	0.00%	
LTC-Charles B. Coreil	4	2,156	0	0	0	0	1	562	0	5	2,718	0.01%	0.00%	
LTC-Delta -Ouachita	2	966	0	0	0	0	3	943	0	5	1,909	0.01%	0.00%	
LTC-Evangeline	0	0	0	0	0	0	3	828	0	3	828	0.01%	0.00%	
LTC-Florida Parishes	1	1,145	0	0	0	0	1	235	0	2	1,380	0.00%	0.00%	
LTC-Folkes	0	0	0	0	0	0	0	0	0	0	0	0.00%	0.00%	
LTC-Gulf Area	5	2,815	0	916	0	0	6	2,018	0	11	5,749	0.03%	0.00%	
LTC-Hammond	6	2,930	0	0	0	0	12	5,567	0	18	8,497	0.04%	0.01%	
LTC-Jefferson Campus	1	586	0	0	0	0	0	0	0	1	586	0.00%	0.00%	
LTC-Jumonville	0	0	0	0	0	0	0	0	0	0	0	0.00%	0.00%	
LTC-Lafayette	9	4,627	1	476	1	693	31	12,901	0	42	18,697	0.10%	0.02%	
LTC-Lafourche	4	1,944	1	1,397	0	0	11	5,566	0	16	8,907	0.04%	0.01%	
LTC-Lamar Salter	1	582	0	0	0	0	8	3,372	0	9	3,934	0.02%	0.00%	
LTC-Huey P Long	0	0	0	0	0	0	6	2,695	0	6	2,695	0.01%	0.00%	
LTC-Mansfield	0	0	0	0	0	0	3	1,076	0	3	1,076	0.01%	0.00%	
LTC-Morgan Smith	4	1,771	0	0	0	0	4	1,725	0	8	3,496	0.02%	0.00%	
LTC-Natchitoches	0	0	1	276	0	0	1	276	0	2	552	0.00%	0.00%	
LTC-North Central	3	1,124	0	0	0	0	2	843	0	5	1,967	0.01%	0.00%	
LTC-Northeast	3	1,380	0	0	0	0	0	0	0	3	1,380	0.01%	0.00%	
LTC-Northwest	4	3,223	1	293	0	0	9	4,516	0	14	8,032	0.03%	0.01%	
LTC-Oakdale	2	1,492	1	1,294	0	0	11	6,015	0	14	8,801	0.03%	0.01%	
LTC-River Parishes	11	5,106	0	0	0	0	20	8,901	0	31	14,007	0.07%	0.01%	
LTC-Ruston	5	2,248	0	0	0	0	3	1,405	0	8	3,653	0.02%	0.00%	
LTC-Sabine Valley	0	0	0	0	0	0	2	879	0	2	879	0.00%	0.00%	
LTC-Shelby Jackson	1	408	0	0	0	0	1	281	0	2	689	0.00%	0.00%	
LTC-Shreveport-Bossier	0	0	1	986	0	0	0	0	0	1	986	0.00%	0.00%	
LTC-Slidel	0	0	0	0	0	0	0	0	0	0	0	0.00%	0.00%	
LTC-Sullivan	6	3,223	1	1,479	0	0	10	5,193	0	17	9,895	0.04%	0.01%	
LTC-Tallulah	1	586	0	0	0	0	1	293	0	2	879	0.00%	0.00%	
LTC-Techs	11	5,478	2	2,318	1	1,362	22	10,948	300	36	20,406	0.08%	0.02%	
LTC-T H Harris	11	5,418	1	982	0	0	19	10,790	0	31	17,170	0.07%	0.01%	
LTC-West Jefferson	0	0	0	0	0	0	0	0	0	0	0	0.00%	0.00%	
LTC-West Side	0	0	0	0	0	0	0	0	0	0	0	0.00%	0.00%	
LTC-Young Memorial	2	751	0	0	0	0	10	4,878	0	12	5,629	0.03%	0.00%	
Centenary	154	385,410	96	279,807	161	551,551	0	0	411	1,218,768	0.94%	1.01%		
Dillard	102	264,471	20	61,160	3	10,374	0	0	125	336,005	0.29%	0.28%		
La College	247	604,695	78	232,408	110	367,993	0	0	436	1,205,096	1.00%	1.00%		
Loyola	368	918,339	187	534,021	168	556,538	0	0	723	2,008,898	1.66%	1.67%		
NO Bapt. Seminary	4	13,280	4	10,682	0	0	0	0	8	23,942	0.02%	0.02%		
Our Lady Holy Cross	122	306,999	26	74,921	9	34,580	0	0	157	416,500	0.36%	0.35%		
St. Joseph Seminary	9	23,922	6	16,819	7	25,935	0	0	22	66,676	0.05%	0.06%		
Tulane	201	496,248	100	283,214	382	1,257,589	0	0	683	2,037,051	1.57%	1.69%		
Xavier	368	917,004	188	559,811	49	164,107	0	0	605	1,640,922	1.39%	1.36%		
Rochester Institute	0	0	2	6,116	0	0	0	0	2	6,116	0.00%	0.01%		
Our Lady Of Lake	214	537,878	42	133,023	8	32,851	0	0	264	703,752	0.61%	0.58%		
Total	27,939	70,199,872	8,673	26,908,679	6,200	22,626,845	722	699,071	49	14,650	43,534	120,449,117	100.00%	100.00%

Average Award Amount \$2,513 \$3,103 \$3,649 \$968 \$300 \$2,767

Expenditures by School Type:

	Opportunity		Performance		Honors		Tech		Total				
	#	\$	#	\$	#	\$	#	\$	#	#	%	\$	%
State Schools	25,011	64,351,342	7,819	24,546,401	5,296	19,612,019	38	46,369	38,164	38,164	87.66%	108,569,581	90.14%
Community Colleges and LTCs	1,139	1,380,304	104	170,296	7	13,308	684	652,702	1,934	1,934	4.44%	2,217,810	1.84%
Private Schools	1,789	4,468,226	750	2,191,982	897	3,001,518	0	0	3,436	3,436	7.89%	9,661,726	8.02%
Total	27,939	70,199,872	8,673	26,908,679	6,200	22,626,845	722	699,071	43,534	43,534	100.00%	\$ 120,449,117	100.00%

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SOURCES:

Higher Education Tuition and Fees: Louisiana's Options for Keeping Pace,
Publication 313, May 2007, Public Affairs Research Council of Louisiana, Inc.

Measuring Up 2006: The State Report Card on Higher Education Louisiana,
2006, The National Center for Public Policy and Higher Education.

TOPS Payment Summary, December 13, 2007,
<http://www.osfa.state.la.us/ACYR0607.pdf>

TOPS Reporting System: Report to the House Education Committee,
November 16, 2004, Board of Regents.

- Minimum 17 on the ACT.
- Minimum 2.25 postsecondary cumulative grade point average.

Award:

- Full tuition at any participating Wyoming community college for four semesters.
- \$800 per semester if full-time status (12 hours) is maintained*.
- An additional four semesters to be awarded if a student earns a certificate with a 2.25 cumulative grade point average, provided that student also meets other eligibility requirements and the limit of six years or the equivalent of eight full-time semester hours is not exceeded.
- The additional Career Hathaway Scholarship may also be used to pursue either a second certificate or a degree at a participating Wyoming community college.

2. The Hathaway OPPORTUNITY Scholarship**Requirements:**

- Minimum 2.5 cumulative grade point average in high school.
- Minimum 19 on the ACT.
- Minimum 2.25 postsecondary cumulative grade point average.

Award:

- Full tuition at participating Wyoming postsecondary institutions for the equivalent of eight semesters and within the limit of six academic years.
- \$800 per semester if full-time status (12 hours) is maintained*.

3. The Hathaway PERFORMANCE Scholarship**Requirements:**

- Minimum 3.0 cumulative grade point average in high school.
 - Minimum 21 on the ACT.
 - Minimum 2.5 postsecondary cumulative grade point average.
-

- Minimum 2.5 postsecondary cumulative grade point average.

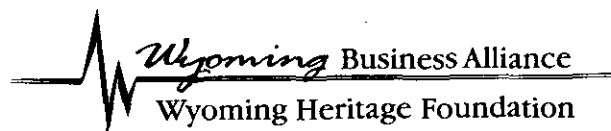
Award:

- Full tuition at participating Wyoming postsecondary institutions for the equivalent of eight semesters and within the limit of six academic years.
- \$1600 per semester if full-time status is maintained*.

5. The Hathaway NEED-BASED Scholarship

- The Hathaway Need-Based Scholarship is intended to supplement the Hathaway Merit Scholarships for qualifying students to provide additional aid for unmet needs.
- First, a student must meet eligibility requirements for one of the Hathaway Merit Scholarships. Next, the student must qualify for financial aid on the FAFSA form.
- Calculations of unmet need for the Hathaway Need-Based Scholarship:
 1. Determine postsecondary cost of attendance.
 2. Subtract estimated family contribution as determined by the FAFSA analysis.
 3. Subtract Hathaway Merit Scholarship Award amount.
 4. Subtract all grants/scholarships received by student.
 5. Subtract \$2,000 (Hathaway Scholarship Program requirement for financial commitment of the student).
- If a student's annual unmet need is greater than \$2,000, the student will receive additional money, not to exceed \$750 per semester.

*Remedial coursework hours do not apply toward the minimum 12 semester hours needed to retain the award.



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