LOS ANGELES COMMUNITY COLLEGE DISTRICT
BOARD OF TRUSTEES
LEGISLATIVE & PUBLIC AFFAIRS COMMITTEE MEETING

Educational Services Center
Board Room – First Floor
770 Wilshire Boulevard
Los Angeles, CA 90017
Wednesday, April 18, 2018
3:00 p.m. – 4:15 p.m.

Committee Members
Mike Fong, Chair
Andra Hoffman, Vice Chair
Gabriel Buelna, Member
Scott J. Svonkin, Board Alternate
Maria Luisa Veloz, Staff Liaison
Marvin Martinez, College President Liaison

Agenda
(Items may be taken out of order)

I. ROLL CALL

II. PUBLIC SPEAKERS*

III. NEW BUSINESS

A. Federal Update Report
   -Leslie Pollner, Holland & Knight LLP

B. State Legislative Update Report
   1. Higher Education Policy Update
      - Dale Shimasaki, Strategic Education Services
   2. Community College CEO New Funding Formula Final Report
      - Lizette Navarete, Vice President Community College League of California
   3. State Budget Update Report
      - Patrick McCullum, The McCullum Group
   4. Legislative Priorities for Legislative Caucuses and Key 2018 Bills
      - Dale Shimasaki, Strategic Education Services

IV. OLD BUSINESS

V. DISCUSSION

VI. ADJOURNMENT
*Members of the public are allotted three minutes time to address the agenda issues.

If requested, the agenda shall be made available in appropriate alternate formats to persons with a disability, as required by Section 202 of the American with Disabilities Act of 1990 (42 U.S.C. Section 12132), and the rules and regulations adopted in implementation thereof. The agenda shall include information regarding how, for whom, and when a request for disability-related modification or accommodation, including auxiliary aids or services may be made by a person with a disability who requires a modification or accommodation in order to participate in the public meeting. To make such a request, please contact the Executive Secretary to the Board of Trustees at 213/891-2044 no later than 12 p.m. (noon) on the Tuesday prior to the Committee meeting.
Memorandum

Date: April 12, 2018

To: LACCD Legislative & Public Affairs Committee

From: Holland & Knight LLP

Re: Federal Policy Update

This memo provides a brief overview of key issues impacting the Los Angeles Community College District, including:

- FY 2018 Omnibus
- Census Update
- DACA Update
- Public Benefit Regulation
- Higher Education Legislation

**Congress Passes Massive Omnibus Package; President Trump Signs into Law**

On March 23, Congress passed a $1.3 trillion FY 2018 omnibus spending bill, narrowly avoiding another government shutdown. The measure boosts funding for defense and domestic programs, and is consistent with the two-year budget caps deal reached earlier in February, which allowed for a $80 billion increase in defense spending, and a $63 billion increase for nondefense programs.

The bill will fund the government through September, and garnered bipartisan support – it passed 256-17 in the House and 65-32 in the Senate. House Speaker Paul Ryan (R-WI) emphasized that the bill includes much of the President’s priorities, including beginning construction of a wall along the U.S.-Mexico border, programs to combat opioids, investment in infrastructure, and funding for school safety. Several Democratic priorities were also acknowledged in the $63 billion increase in domestic spending, such as funding for critical housing programs and infrastructure grant programs. However, the package does not include a resolution on DACA, despite last minute negotiations, which were ultimately unsuccessful and led many Democrats to oppose the bill. Both Senators Feinstein and Harris voted against the measure.

Below is an overview of education and workforce funding included in the FY 18 package.

**Department of Education**

The U.S. Department of Education received a $3.9 billion increase in the FY 18 Omnibus funding bill. The department will be funded at $70.9 billion in fiscal 2018 — a 6 percent increase over fiscal 2017.
Congressional leaders made a deal to increase spending in the bill on “college affordability” by $2 billion this year and in fiscal year 2019. Those increases were scattered across a range of programs, including Pell Grants, Federal Work-Study, Supplemental Educational Opportunity Grants and others. The funding package specifically:

- Increases the maximum Pell Grant award by $175 allowing for a $6,095 maximum award;
- Provides a $140 million increase for Federal Work-Study, bringing the total to $1.1 billion;
- Gives a $840 million for Supplemental Education Opportunity Grants (SEOG), a $108 million increase;
- Provides $1.01 billion for TRIO Programs, an increase of $60 million;
- Gear-up received a $10 million increase for a total of $305 million;
- HBCU’s and other Minority-serving institution received a combined $106 million increase for grant programs.
- Minority-Serving Institutions: The Title III and Title V programs receive across-the-board increases of 14.3 percent, which represents more than $82 million in new funding.

In Elementary and Secondary Education the deal includes $1.1 billion — a $700 million boost — for the Student Support and Academic Enrichment grants, which can be used for school counseling and mental health services, technology investments and STEM education. This funding level reflects the authorized amount in the 2015 Every Students Succeeds Act, the legislation that reauthorized the Elementary and Secondary Education Act.

Funding for other key Elementary and Secondary Education programs include:

- A $300 million increase for Title I Grants to school districts for a total of $15.8 billion;
- $275 million increase for IDEA/Special Education State grants for a total of $13.1 billion;
- $75 million increase for Career and Technical Education State Grants for a total of $1.2 billion;
- $86 million increase for Impact Aid for a total of $1.4 billion including a 4.5 billion increase for federal properties;
- After-school programs would get a $20 million increase, for total funding of $1.2 billion;
- $2.1 billion in grants for teachers’ professional development and class-size reduction efforts;
$25 million for school climate grants to combat school violence.

**Department of Labor**
The bill provides $12.2 billion to fund Department of Labor programs. The FY18 omnibus bill provides $12.2 billion for the Department of Labor (DOL), a $129 million increase from the FY17 level. This includes:

- $145 million for Apprenticeship programs, an increase of $50 million from the FY 17 level of $95 million;
- $1.7 billion for Job Corps, a $14.5 million increase above FY17;
- $89.5 billion for Youth Build, a $5 million increase over FY 17.
- Increased state workforce formula grants under Title I of the Workforce Innovation and Opportunity Act (WIOA) by a combined $80 million, including a $30 million increase to the WIOA Adult program (from $816 million to $846 million); a $30 million increase to WIOA Youth programs (from $873 million to $903 million); and a $20 million increase to the WIOA Dislocated Worker state grants (from $1.02 billion to $1.04 billion).

**National Science Foundation**
NSF receives $7.77 billion, $295 million above the FY 2017 level and $1.1 billion above the president’s request to foster innovation and research in advanced manufacturing; STEM education; and cybersecurity.

**Department of Health and Human Services**
The Department of Health and Human Services through the Administration for Children and Families received funding for the following early education programs:

- Preschool Development Grants was level funded at $250 million;
- Head Start received $9.9 billion in funding.

HHS also received an additional $306 million for the Substance Abuse and Mental Health Services Agency (SAMSHA) for a total of $1.5 billion for mental health services and programs. A significant amount of funds will be allocated to address juvenile mental health issues.

**Department of Justice**
Following the school shooting tragedy in Parkland, Florida last month, Congress provided a significant amount of funding for school safety programs through the Departments of Justice, Education and Health and Human Services. Specifically Justice received funding for:

- $75 million for the Safe Schools grant, a program that has not received funding since 2009;
• $94 million for youth mentoring;
• $20 million to reduce gang and gun violence;
• $4 million for youth gang prevention.

National Endowment for the Arts/National Endowment for the Humanities
The National Endowment for the Arts and the National Endowment for the Humanities each received a $3 million increase, while the president’s budget had called for both to be eliminated.

Republicans Look to Rollback Omnibus Spending

President Trump and House Majority Leader Kevin McCarthy reportedly are in talks to rollback spending increases in the recently-passed Omnibus bill by using an obscure provision in the budget law. During the recent Congressional spring recess Republicans received a lot of pushback in their districts about the $1.3 trillion omnibus bill, which significantly increased the federal budget deficit (in addition to the massive tax package that Congress recently passed).

Democrats, who supported the omnibus in exchange for increased funding of priority domestic programs, are annoyed. “It would completely poison the well to the idea that there can be responsible bipartisan compromise,” said Matthew Dennis, a spokesman for Rep. Nita Lowey (N.Y.), the senior Democrat on the House Appropriations Committee. The Republicans, Dennis added, are trying “to renege on elements that were critical to passage of the omnibus.”

Ninety conservatives House Republicans voted against the omnibus last month to protest the large spending increases for domestic program. “They’re upset. They’re saying, ‘What are you guys doing up there?’ ” Rep. Dave Brat (R-Va.), a member of the far-right House Freedom Caucus, said of his constituents. “If the Republicans stand for anything, it’s fiscal responsibility.”

To appease House the conservatives, Trump and McCarthy are reportedly in talks to utilize the Congressional Budget and Impound Control Act, which allows the administration to propose a revocation of certain funds. Congress would then have 45 days to either consider the proposed rescissions or ignore them.

It should be noted that even if the House passes a measure to rescind portions of the omnibus, it would be difficult—if not impossible—for the measure to pass the Senate.

Census 2020

Late last month, the U.S. Commerce Department announced that it will include a question about citizenship to the 2020 census questionnaire. In an eight-page memo Commerce Secretary Wilbur Ross said the Justice Department has requested that the census ask who is a citizen in order to help determine possible violations of the Voting Rights Act. The Department also pointed out that previous Census surveys before 1950 consistently asked citizenship questions.
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The Census count is used to redraw congressional districts and determine federal formula funding. It also forms the basis of countless government and academic studies that drive public policy decisions and legislation in DC. Observers are deeply concerned that the citizenship will have a “chilling” effect on responses—and will lead to a major undercount, particularly in urban areas with significant immigrant populations. Arguing that the citizenship question is unconstitutional, California AG Xavier Becerra announced that California would sue the Trump Administration to prevent the question from being included. New York has also filed a multi-state lawsuit.

The House Oversight Committee has announced it will hold a hearing on May 8th on Census 2020 and plans to focus specifically on the citizenship question.

It should be noted that the FY 18 Omnibus included more than $2.8 billion for Census in fiscal year 2018, with over $2.5 billion going to "periodic programs,” which includes the decennial census. The boost represents more than a $1.3 billion increase over enacted fiscal year 2017 levels -- and more than $1 billion over the administration's adjusted fiscal year 2018 budget request.

DACA Remains Fluid

The effort to find a DACA fix remains fluid and uncertain. On April 1st, Easter Sunday, President Trump tweeted that the DACA deal is dead. Specifically, the President’s tweet read, “Border Patrol Agents are not allowed to properly do their job at the Border because of ridiculous liberal (Democrat) laws like Catch & Release. Getting more dangerous. “Caravans” coming. Republicans must go to Nuclear Option to pass tough laws NOW. NO MORE DACA DEAL!”

The President’s declaration caught advocates by surprise as Trump had continued to support a DACA deal, though with concessions such as border wall funding. Two weeks earlier, President Trump threatened to veto the recently-passed FY 2018 Omnibus because it did not include a DACA solution and border wall funding.

Meanwhile, DACA remains in the courts where the 9th Circuit in California is expected to rule this summer. The Supreme court could accept the case as early as October, pushing the final ruling into 2019.

Further complicating matters, on Sunday, April 8th, GOP Senator Lindsey Graham of South Carolina said he expects Congress and the White House to reach an immigration deal by spring or early summer. “There’s a deal to take care of them and get the border wall we desperately need, plus interior enforcement to make us safer,” the South Carolina Republican said on ABC’s “This Week.” “That deal can be done, and I'll make a prediction on this show that there’ll be another effort to marry up border security and DACA.” Graham, who has been the lead GOP negotiator on DACA in the Senate, emphasized the critical need to reach a DACA deal because the courts may rule that President Trump has the authority to end DACA. “It may fail, but I
believe we owe it to the American people to try again,” the senator said. “And I think the president is open-minded to trying again.”

**Trump Administration Working on Proposal to Penalize Immigrants Using Public Benefits**

The U.S. Department of Homeland Security plans to propose regulations that change longstanding policy about the meaning and application of the “public charge” provisions of immigration law. Under the current definition, a public charge is a person who is primarily dependent on the government for subsistence. A person deemed likely to become a public charge can be denied admission to the U.S. or the ability to become a lawful permanent resident (LPR). According to leaked drafts, the new proposal would greatly expand the benefits that could be considered in determining whether a person is likely to become a public charge. Immigrants’ use of programs related to their health and wellbeing — or that of their family members, including U.S. citizen children — could be weighed in deciding whether to grant lawful permanent residence (a green card). The proposed rule would apply similar criteria to discretionary decisions for people seeking to extend or change their temporary nonimmigrant status in the U.S.

Current rules only apply to immigrants who receive cash payments from the federal Temporary Assistance for Needy Families (TANF) program. DHS’s proposed rule would broaden the definition of benefits to include the earned income tax credit, Section 8, ACA health insurance subsidies, food stamps and other non-cash benefits. Exempt would be K-12 education, Head Start and benefits derived from service in the U.S. military.

This proposal has immigration and anti-poverty advocates concerned for immigrant families, who may forgo accessing federal work support benefits out of fear of jeopardizing their U.S. residency. The proposal further require immigrants to post cash bonds if they are more likely to one day need or accept benefits. The minimum amount of the bond would be $10,000.

The proposal, not yet finalized, will be published in the Federal Register and the public will be invited to comment. Action is expected in the next few weeks.

**Senator Schatz Introduces College for All Act Legislation Provides Incentives to States to Provide Debt-free College; Includes Provision to Make DACA Students Pell Eligible**

U.S. Senator Brian Schatz (D-Hawaii) has introduced S. 2597, the Debt-Free College Act. The bill restores a path to affordable college by providing states incentives through matching grants to increase investments in public higher education and provide students with debt-free college.

The bill has 32 additional co-sponsors, including California Senator Kamala Harris. A companion bill was introduced in the House co-sponsored by Rep. Judy Chu.

The Debt-Free College Act establishes a state-federal partnership that provides a dollar-for-dollar federal match to state higher education appropriations in exchange for a commitment to help students pay for the full cost of attendance without having to take on debt.
“College has become a dream that is weighed down with a giant price tag that an individual could only imagine taking on,” said Senator Harris. “Those who take that challenge face mountains of debt and are trapped in a devastating cycle of loans that will follow them for decades. We must take action and address this crisis before it’s too late, and this bill puts us on a path to doing so.”

Under the Partnership, states would receive a one-to-one federal match to their higher education appropriations in exchange for a commitment to help students pay for the full costs of attendance without having to take on debt. States that participate in the Partnership would commit to maintaining funding for public 2- and 4-year colleges and providing need-based grants to cover students’ cost of attendance that their families cannot afford, with the goal of advancing debt-free college for all in-state students within 5 years of joining the partnership.

Additionally, the bill enables the Partnership to:

- Allows participating states to allocate a portion of their federal grant (up to 10 percent) toward building capacity and improving educational quality, such as increasing class offerings, investing in student support services, and repairing campus infrastructure, all of which would benefit long-underfunded community colleges in particular;
- The Partnership prioritizes working-class students by requiring states to first cover any unmet need for Pell Grant recipients. Remaining funds can then be used to reduce or eliminate debt for other eligible students, as well as build capacity and increase educational quality;
- The Partnership also extends federal Pell grant eligibility to Deferred Action for Childhood Arrivals (DACA)-eligible students, or Dreamers, so that they can afford to attend college;
- Ends the inequitable practice of asking about drug-related convictions on the free application for federal student aid (FAFSA), a practice that has caused confusion and potentially kept many students of color from receiving Pell Grants or other aid to which they were eligible;
- Includes a grant program to reduce or eliminate the need to borrow for college for students enrolled in public and private non-profit Minority Serving Institutions (MSIs), including Historically Black Colleges and Universities, Tribal Colleges and Universities and Hispanic Serving Institutions that serve at least 35 percent low-income students (defined by eligibility to receive Pell Grants)

The bill is co-sponsored by U.S. Senators Kirsten Gillibrand (D-N.Y.), Cory Booker (D-N.J.), Kamala Harris (D-Calif.), Jeff Merkley (D-Ore.), Elizabeth Warren (D-Mass.), Sherrod Brown (D-Ohio), Richard Blumenthal (D-Conn.), Tammy Baldwin (D-Wis.), and Dick Durbin (D-Ill.) and by U.S. Representatives Judy Chu (D-Calif.), Yvette Clarke (D-N.Y.), Joe Crowley (D-N.Y.), Rosa DeLauro (D-Conn.), Mark DeSaulnier (D-Calif.), Keith Ellison (D-Minn.), Jimmy Gomez (D-Calif.), Raul Grijalva (D-Ariz.), Eleanor Holmes Norton (D-District of Columbia), Jared Huffman (D-Calif.), Sheila Jackson Lee (D-Texas), Ro Khanna (D-Calif.), Barbara Lee (D-Calif.), Carolyn Maloney (D-N.Y.), Gwen Moore (D-Wis), Grace Napolitano (D-Calif.), Rick Nolan (D-Minn.), Frank Pallone (D-N.J.), Mark Pocan (D-Wis.), Jamie Raskin (D-Md.), Mark Takano (D-Calif.), Bonnie Watson Coleman (D-N.J.), and Peter Welch (D-Vt.).
Office of the Chancellor

April 18, 2018

To: Legislative and Public Affairs Committee Members

From: Maria Luisa Veloz
Administrative Officer to the Chancellor

Subject: April 18 State Legislative and Public Affairs Update

We enter the fourth month of the 2018 session where the legislature is focused on policy committee hearings addressing legislative bill proposals. The Brown Administration is focused on defending its January budget proposals in budget hearings and is working on its May Revision to the budget. Specifically, their major initiatives in the community colleges include the online community college proposal and the new funding formula for community colleges. The legislature is reviewing these major initiatives and disposition of both issues is expected to occur during deliberations of the budget.

The budget remains solidly in the black for the current fiscal year. The Department of Finance’s March Finance Bulletin indicates revenues are $2.581 billion above their forecast when the budget was adopted in June 2017.

Upcoming deadlines for this session:

April 27: Last day for policy committees to hear and report to fiscal committees fiscal bills introduced in their house.

May 11: Last day for policy committees to hear and report to the floor non-fiscal bills introduced in their house

June 15: Budget bill must be passed by midnight.

Budget Update – 2018-2019 Board of Governors System Budget Request
Prepared by: MGI

The administration’s budget proposal this year includes some of the most dramatic proposed changes that community colleges have seen in years. The major components of the proposal include:

1. Development of a new community college funding formula
2. Creation of a completely online 115th community college
3. Implementation of AB 19 (Santiago) of 2017
Funding Formula

CEO Group Recommendations
Under the administration’s proposal, new community college funding would be allocated based roughly on 50% enrollment, 25% equity factor and 25% completion factor. After the release of the trailer bill language, the Department of Finance released initial funding simulations. The result was significant shifting of funding of certain districts to other districts. At the request of the State Chancellor, a group of CEOs met to develop principles to guide the development of a new funding formula. The principles they developed are:

1. Increase community college base funding prior to implementation of a new funding formula
2. Integrate the enrollment and academic progress of economically disadvantaged populations
3. Provide two years of program transition funding
4. Adequately define equity metrics
5. Enhance funding predictability with three-year average for base funding and assigning Summer FTE to the fiscal year in which instruction was held
6. Progressively phase out transition funding to full implementation in 2025
7. Recognize regional and local factors
8. Establish a funding formula oversight council to conduct annual analyses and make recommendations for adjustment

Categorical Programs
The Chancellor’s Office is also looking at categorical consolidation. The most likely categorical programs to be put under one umbrella are the Student Success and Support Program, Student Equity and the Basic Skills Initiative. There are discussions of including other categorical programs, but those programs either have a lot of support in the Legislature or their construct would make them difficult to integrate. There is some discussion about including the performance funding out of the categorical program as opposed to the base where a district’s fixed costs come from.

Where is the Legislature?
At the Subcommittee level, members are skeptical of the plan and a number of members and staff are outright opposed to including anything in a formula that creates a performance-based funding model. Both Chairs of the Assembly Budget Subcommittee #2 and the Senate Budget Subcommittee #1 would reject the Governor’s proposal were they to vote now. Additionally, Assemblyman Medina, Chair of the Assembly Higher Education Committee and a member of the Budget Subcommittee on Education has introduced AB 2767 which would have the LAO conduct a report on changing the funding formula.

Legislative staff are aware that the current trailer bill language does not work and that it needs significant changes before it can be implemented. They are looking at the two-year transition funding as a way to get to a formula that works. There is a sense that we need a new formula for community colleges, but what that ultimately looks like is the critical question.

Other Issues
The large district coalition has been in meetings and has developed some principles that Legislators are examining. The other issues are including some amount of growth Two other issues are emerging from the budget discussions. One, is the movement of noncredit CDCP course funding from positive attendance to census date. The other is an examination of the current growth formula. The Legislature could consider equalizing noncredit through the census
date as the current apportionment model provides noncredit courses with less funding than credit courses. Additionally, the current growth model will likely be examined should the Legislature choose to provide two years of transition funding while a new funding formula is finalized. MGI clients have indicated that through the transition, there ought to be some growth allocated so that districts that are growing can fund all the students that they serve. This is particularly important because of the transition funding that will leave less growth “on the table.”

Online Education
In January the administration released a proposal to create an entirely online 115th California Community College. The college would be run by the Board of Governors initially and would focus on those in the workforce that have “some education.” The college would not go through the current Online Education Initiative but would stand alone.

Where is the Legislature?
If the vote were taken today in the Subcommittees, the online college would not move out of the Subcommittee level. Assemblyman McCarty, Senator Portantino and staff have indicated that the proposal still needs work in order to get their support. That said, it appears that this is the Governor’s top issue for community colleges and one of his top issues in the budget overall.

The Governor is “working” this issue and the State Chancellor’s Office is very supportive. There is strong opposition from faculty groups on the proposal. The Building Trades are also opposed to parts of the online college proposal. This is an issue that could move to the “Big Three” budget negotiations where groups like CTA and CFT will have to stay strong if there is going to be a counter proposal that is not a 115th college. If the ultimate goal is to go through the current infrastructure rather than create a new college, then there could be an opportunity to offer greater online offerings for local districts.

Student Financial Aid
Century Foundation Report
The Century Foundation recently released a report commissioned by the Student Aid Commission. The report goal was to provide recommendations to CSAC for delivering a streamlined and more equitable financial aid model. The report recommends eventually moving to a grant program that provides for total cost of attendance, rather than the current grant structure.

Staff developed a roadmap that they will present to the Commission. The roadmap will lay out a plan for implementation of the report over three steps, starting in the current year and moving through 2019-20. The plan lays out the following proposals:

1. Phase One: 2018-19 Budget
   a. Increase the Cal Grant Access Award
   b. Increase CSAC outreach and early information
   c. Create an Innovation Fund for financial aid

2. Phase Two: 2018 or 2019 Legislative Year
   a. Cal Grant Consolidation

3. Phase Three: 2019-20 Legislative Session and Budget Years
   a. Substantial overhaul of the financial aid system to move to an Expected Family Contribution (EFC)
This could be a year where phase one has the opportunity to be implemented with the additional funding that the LAO is projecting will be available at the May Revise. They are projecting that most of this funding will be outside of Proposition 98 because the Maintenance Factor has been mostly paid off.

Financial Aid Consolidation
The Administration has proposed consolidating two community college financial aid programs that largely serve the same population. One provides economic incentive to students that take at least 12 units and the other would focus on students taking 15 units. Under the Administration proposal students would earn additional financial aid if they are a Cal Grant recipient and take 12 to 15 units. The amount of financial aid would increase based on each additional unit a student takes over 12 units.

The LAO has recommended rejecting this proposal and instead consolidating community college financial aid (including Cal Grant B and C) and creating one grant program. They suggest the possibility that this could be funded inside Proposition 98. We would not want to see Cal Grants funded from Proposition 98 dollars.

Implementation of AB 19
The Administration's budget proposal includes $46 million to fund the implementation of AB 19 (Santiago), the Community College Promise Program. It is estimated that this should provide sufficient funding to implement a College Promise Program, including AB 540 students, throughout the state. In order to have access to the funding, community college districts must implement a number of financial aid and student centered best practices. Those include:

1. Partnering with one or more local educational agencies to create an Early Commitment to College Program;
2. Partnering with one or more local educational agencies to support and improve high school student preparation for college and reduce postsecondary remediation through practices that may include, but shall not be limited to, small learning communities, concurrent enrollment;
3. Utilizing evidence-based assessment and placement practices at the community college that include multiple measures of student performance;
4. Participating in the California Community College Guided Pathways Grant Program;
5. Leverage the Board of Governors fee, ensuring students complete the Free Application for Federal Student Aid, Cal Grant application, or Dream Act application, and participate in a federal loan program.

The measure provides for the State Chancellor's Office to develop the allocation model. They have indicated that they are developing a proposal that will allow all districts to waive fees for first-time, full-time students. If there is remaining funding, the Chancellor’s Office will develop a methodology for allocating that funding based on FTES and the number of students that are PELL eligible.

Where is the Legislature?
Both of the subcommittees are supportive of this proposal and the Assembly Budget Subcommittee #2 on Education has already heard the issue. The Assembly Budget Subcommittee, Chaired by Assemblyman McCarty passed a similar proposal last year and Mr. McCarty was a joint author on AB 19.
May Revise
The Administration will release an updated budget proposal in mid-May. Initial estimates are that the May Revise could present significant additional revenues. Initial estimates are that it could be as much as $3 billion in additional funding. Even though there is projected to be additional revenues, projections indicate that not much of that funding will be available for Proposition 98. As mentioned above, this could create an opportunity to grow Cal Grants with non-Proposition 98 resources. There could be a small amount of Proposition 98 revenues available which could be put toward a number of areas, including an increase in the base grant or to fund liabilities. Faculty would like some additional funding to go towards increasing full-time faculty.

Recommendation:

1. Continue to work with Legislature and administration to support the two-year transition funding and work to develop a funding formula that supports LACCD’s strategic goals for student success.
2. Work with the Legislature to develop an online plan that gives districts the opportunity to offer enhanced online opportunities.
3. Support full implementation of AB 19 (Santiago), the College Promise Program.
4. Support direction of Student Aid Commission report and roadmap to implementation of streamlined grant program.

LEGISLATIVE UPDATE – Prepared by: SES

AB 2306 [Santiago] – Student Financial Aid: Cal Grant Program
LACCD Position: Sponsored by LACCD
Status: Do pass and re-refer to Assembly Committee on Appropriations.

Summary:
This measure would increase the Cal Grant eligibility requirement for a community college student, or former student who transfers to a four-year institution. The bill will allow students who are eligible to receive the Cal Grant award for the amount of six years of attendance instead of only four years.

Position:
• District position is support. (Sponsored)

Update:
• The measure passed the Assembly Committee on Higher Education on a 9-2 vote.

Support and Opposition:
Alliance for Children's Rights
California Student Aid Commission
Community College League of California
Faculty Association of California Community Colleges
Foothill-De Anza Community College District
Kern Community College District
Los Rios Community College District
North Orange Community College District
Peralta Community College District
San Diego Community College District
San Francisco Community College District
San Jose-Evergreen Community College District
South Orange County Community College District
Yuba Community College District

**Opposition:** No opposition recorded.

**Recommendation:** Strongly Support

**AB 2575 [Santiago] AS AMENDED IN ASSEMBLY APRIL 05, 2018 – High School and Community College Dual Enrollment: College and Career Access Pathways Partnerships: Private Schools**

**Status:** Re-referred to Assembly Committee on Higher Education.

**Summary:**
This measure would authorize the governing body of a community college district to enter into a College and Career Access Pathways (CCAP) partnership, or dual enrollment, with the governing body of a private school. This would also authorize partnerships with parochial schools as well.

**Position:**
- The District position is support. (Sponsored)

**Update:**
- This measure is to be heard in the Assembly Committee on Higher Education on April 17, 2018 at 1:30PM.
- NOTE: There is similar legislation that will also be heard on the same date. AB 2891 [Holden] would authorize the governing body of a charter school to enter into a CCAP partnership agreement with the governing board of a community college district.

**Support:** Community College League of California

**Opposition:** None Reported

**Recommendation:** Strongly Support

**AB 3101 [Carrillo] – Community Colleges**

**LACCD Position:** Sponsored by LACCD

**Status:** Re-referred to Assembly Committee on Higher Education.

**Summary:**
This measure requires the Board of Governors of the California Community Colleges to revise CCCApply application process by no later than July 31, 2019 so only data that is required by the federal government, or that is otherwise necessary as determined by the Board, is collected during the process.

**Position:**
- District position is support. (Sponsored)

**Update:**
- This measure is to be heard in the Assembly Committee on Higher Education on April 17, 2018 at 1:30PM.
Support: City College of San Francisco  
Community College League of California  
Contra Costa College  
North Orange County  
Southwestern College  
San Diego Community College District  
West Hills College Coalinga  
Irvine Valley College  
College of the Canyons

Opposition: None Reported

Recommendation: Strongly Support

SB 1406 [Hill] - Public postsecondary education: community college districts: baccalaureate degree pilot program  
LACCD Position: Support  
Status: Amended in Senate Education Committee and re-referred to Senate Appropriations Committee.

Summary:  
The Board of Governors, in consultation with the California State University (CSU) and the University of California (UC) may establish baccalaureate degree pilot programs, at up to 15 community college districts, with one baccalaureate degree program each. This measure:

- Extends the sunset date for the Board of Governors to establish baccalaureate degree pilot programs by two years to July 1, 2023.
- Requires that a student participating in a baccalaureate pilot degree program to begin the program no later than the 2022-23 academic year.
- Repeals an existing requirement that would require student participating in the baccalaureate pilot degree program to complete their degree by the end of the 2022-23 academic year.

Position:  
- District position is support.

Update:  
- This bill passed the Senate committee on Education on a 6-0 vote.

Support:  
California Community College Chancellor’s Office  
Community College League of California  
Feather River College  
Foothill-De Anza Community College District  
Grossmont-Cuyamaca Community College District  
Kern Community College District  
Los Rios Community College District  
MiraCosta Community College District  
North Orange Community College District  
Peralta Community College District  
San Diego Community College District  
San Diego Mesa College
San Francisco Community College District
South Orange County Community College District
Southwestern Community College District
Yuba Community College District

Opposition No opposition recorded.

Recommendation: Support

**AB 1935 [Irwin] – Community college: Tutoring**
LACCD Position: N/A
Status: Re-referred to Assembly Committee on Appropriations.

Summary:
This measure would provide that supervised tutoring for basic skills for degree-applicable, and transfer-level courses, are eligible for state apportionment funding. The Board of Governors would be responsible for adopting the regulation by no later than July 31, 2019.

Position:
• No position.

Update:
• This bill passed the Assembly Committee on Higher Education on a 13-0 vote.
• NOTE: SB 1009 [Wilk] is similar legislation that would also authorize state apportionment funding for tutoring students.

Support:
AVID Center
California Federation of Teachers
Chief Student Services Officers Association
Community College League of California
Foothill-De Anza Community College District
Kern Community College District
Los Rios Community College District
North Orange Community College District
Peralta Community College District
San Diego Community College District
San Francisco Community College District
South Orange County Community College District
The Campaign for College Opportunity
Youth Policy Institute
Yuba Community College District

Opposition: No opposition is recorded.

Recommendation: Watch.
SB 1009 [Wilk] – Community Colleges: Tutoring
LACCD Position: N/A
Status: Amended in Senate Education Committee, re-referred to Senate Appropriations Committee.

Summary:
This measure would provide that supervised tutoring for courses, and classes, in all subject areas regardless of being transfer-credit or not would be eligible for state apportionment funding. The measure would apply:
- Whether the student has been referred by a faculty member to tutoring
- Self-initiated tutoring.

Position:
- No position.

Update:
- This bill passed the Senate Education Committee on a 5-0 vote.
- NOTE: AB 1935 [Irwin] is similar legislation that would also authorize state apportionment funding for tutoring students.

Support and Opposition:
Coast Colleges
College of the Canyons
Foothill-De Anza Community College District
Kern Community College District
Los Rios Community College District
Peralta Community College District
San Diego Community College District
San Francisco Community College District
South Orange County Community College District
West Hills Community College District
Yuba Community College District

No opposition recorded.

Recommendation: Watch.

AB 1037 [Limon] - Postsecondary Education: Student Financial Aid: Cal Grant B Service Incentive Grant Program.
LACCD Position: N/A
Status: Referred to Senate Committee on Education.

Summary:
This measure would establish the Cal Grant B Service Incentive Grant Program under the administration of the California Student Aid Commission. The Cal Grant B Service Incentive Program would be made available beginning the 2018–19 academic year. In order for student to be eligible, they would need to:
- Be a recipient of a Cal Grant B award.
- Be enrolled as a student at a campus of the University of California, the California State University, or the California Community Colleges, or at an independent institution of higher education.
• Perform a minimum of 300 hours of community service or volunteer work each academic year that the grant is provided.

Position
• No position.

Update:
• This bill passed the Assembly Floor on a vote of 52-23.

Support:
California Charter Schools Association
California Immigrant Policy Center
California Student Aid Commission (Sponsor)
The Education Trust-West

Opposition: No opposition recorded.

Recommendation: Watch.

AB 1858 [Calderon] - Student Financial Aid: Financial Aid Shopping Sheet
LACCD Position: N/A
Status: Referred to Assembly Appropriations suspense file.

Summary:
This measure would add a provision to the Donahoe Higher Education Act requiring each campus, in a postsecondary institution, to use the U.S. Department of Education’s Financial Aid Shopping Sheet. The Financial Aid Shopping Sheet would be used to inform potential students of the financial aid award packages from the California Student Aid Commission.

Position:
• No position.

Update:
• This bill passed the Assembly Higher Education Committee on a 13-0 vote.

Support:
The Institute for College Access & Success

Opposition: No opposition recorded.

Recommendation: Watch.

AB 2477 [Rubio] – Student Support Services: Dream Resource Liaisons
LACCD Position: N/A (DACA Task Force Recommends Support)
Status: From Assembly Higher Education Committee, re-refer to Assembly Appropriations Committee.

Summary:
This measure would require the California Community Colleges, the California State University, and the University of California to designate a Dream Resource Liaison on each of their campuses to assist students with financial aid and academic planning.
Position:
  • No position.

Update:
  • AB 2477 passed the Assembly Committee on Higher Education on a 11-1 vote (R – Kiley, voting no).
  • NOTE: This is similar legislation to AB 1622 [Low] in 2017 which was held in the Assembly Appropriations Committee.

Support:
Alianza
American Academy of Pediatrics, California
California Immigrant Policy Center
California Student Aid Commission
Central American Resource Center
University of California

Opposition: No opposition recorded.

Recommendation: Support.

SB 1471 [Hernandez] – Cal Grant Program: Competitive Cal Grant A and B Awards
LACCD Position: N/A
Status: Scheduled to be heard in Senate Appropriations on April 16, 2018.

Summary:
This measure would increase the number of Competitive Cal Grant awards authorized from 27,500 to 30,000.

Position:
  • No position.

Update:
  • This bill passed the Senate Education Committee on a 6-0 vote. The bill is scheduled to be heard in the Senate Appropriations Committee on April 16, 2018 at 10am.

Support and Opposition:
Bay Area Council
California Competes
California EDGE Coalition
California State Conference of the NAACP
California Student Aid Commission
Community College League of California
EARN
Foothill-De Anza Community College Districts
John Burton Advocates for Youth
Kern Community College Districts
Los Angeles Area Chamber of Commerce
Los Rios Community College Districts
MALDEF
North Orange County Community College District
Peralta Community College Districts
Public Advocates
San Diego Community College Districts
San Francisco Community College Districts
South Orange County
Southern California College Access Network
Student Senate for California Community Colleges
The Campaign for College Opportunity
The Education Trust-West
The Institute for College Access and Success
uAspire
Young Invincibles
Yuba Community College Districts

**Opposition:** No opposition recorded.

**Recommendation:** N/A
Assembly Bill No. 19

CHAPTER 735

An act to add Article 3 (commencing with Section 76396) to Chapter 2 of Part 47 of Division 7 of Title 3 of the Education Code, relating to postsecondary education.

[Approved by Governor October 13, 2017. Filed with Secretary of State October 13, 2017.]

LEGISLATIVE COUNSEL'S DIGEST

AB 19, Santiago. Community colleges: California College Promise.
Existing law establishes the California Community Colleges, under the administration of the Board of Governors of the California Community Colleges, as one of the segments of public postsecondary education in this state. Existing law authorizes the establishment of community college districts under the administration of community college governing boards, and authorizes these districts to provide instruction at community college campuses throughout the state. Existing law requires community college district governing boards to charge students an enrollment fee of $46 per unit per semester. Existing law requires the board of governors to waive this fee for students meeting prescribed requirements.

This bill would establish the California College Promise, to be administered by the Chancellor of the California Community Colleges, which shall distribute funding, upon appropriation by the Legislature, to each community college meeting prescribed requirements to be used to, among other things, accomplish specified policy goals and waive fees for one academic year for first-time students who are enrolled in 12 or more semester units or the equivalent at the college and complete and submit either a Free Application for Federal Student Aid or a California Dream Act application.

The people of the State of California do enact as follows:

SECTION 1. Article 3 (commencing with Section 76396) is added to Chapter 2 of Part 47 of Division 7 of Title 3 of the Education Code, to read:

Article 3. California College Promise

76396. (a) The California College Promise is hereby established, to be administered by the Chancellor of the California Community Colleges.
(b) (1) Upon appropriation by the Legislature, the chancellor shall distribute funding to community college districts to fund colleges that satisfy the requirements of this article.

(2) (A) The chancellor shall establish a funding formula that advances the goals outlined in Section 76396.1.

       (B) It is the intent of the Legislature that sufficient funding be allocated to each community college to waive all student fees pursuant to subdivision (b) of Section 76396.3.

       (C) The funding formula established pursuant to subparagraph (A) shall, for funding appropriated for this article in excess of the funding determined pursuant to subparagraph (B), include, but not be limited to, both of the following factors:

       (i) Number of full-time equivalent students at a community college.

       (ii) Number of students at a community college who satisfy the requirements to receive federal Pell Grants and the requirements in Section 68130.5.

(c) For purposes of this article, "chancellor" means the Chancellor of the California Community Colleges.

76396.1. It is the intent of the Legislature that the California College Promise support the California Community Colleges in accomplishing all of the following goals:

(a) Increasing the number and percentage of high school students who are prepared for and attend college directly from high school and increasing the percentage of high school graduates who are placed directly into transfer-level mathematics and English courses at a community college.

(b) Increasing the percentage of students who earn associate degrees or career technical education certificates that prepare them for in-demand jobs and increasing the percentage of students who report being employed in their field of study.

(c) Increasing the percentage of students who successfully transfer from a community college to the California State University or the University of California and increasing the percentage of students who graduate from college with a baccalaureate degree.

(d) Reducing and eliminating regional achievement gaps and achievement gaps for students from groups that are underrepresented at the California Community Colleges, including, but not limited to, underrepresented students, low-income students, students who are current or former foster youth, students with disabilities, formerly incarcerated students, undocumented students, students meeting the requirements of Assembly Bill 540 of the 2001–2002 Regular Session of the Legislature, and students who are veterans.

76396.2. The requirements for participation in the California College Promise shall advance the goals outlined in Section 76396.1 and shall include all of the following:

(a) Partnering with one or more local educational agencies to establish an Early Commitment to College Program that is consistent with the intent of Article 6.3 (commencing with Section 54710) of Chapter 9 of Part 29 of
Division 4 of Title 2 to provide K–12 students and families assistance that includes, but is not limited to, learning about college opportunities, visiting campuses, taking and completing college preparatory courses, and applying for college and financial aid.

(b) Partnering with one or more local educational agencies to support and improve high school student preparation for college and reduce postsecondary remediation through practices that may include, but shall not be limited to, small learning communities, concurrent enrollment, and other evidence-based practices.

(c) Utilizing evidence-based assessment and placement practices at the community college that include multiple measures of student performance, which shall include, among other measures, overall grade point averages, including grades in high school courses, and using evidence-based practices to improve outcomes for underprepared students.

(d) Participating in the California Community College Guided Pathways Grant Program established pursuant to Part 54.81 (commencing with Section 88920) in order to clarify the academic path for students, help students enter a pathway, help students stay on an academic path, and ensure students are learning.

(e) Maximizing student access to need-based financial aid by leveraging the Board of Governors fee waiver established under Section 76300, commonly known as the California Promise Grant, ensuring students complete the Free Application for Federal Student Aid, Cal Grant application, or Dream Act application, and participating in a federal loan program authorized under Title IV of the federal Higher Education Act of 1965, as amended (20 U.S.C. Sec. 1070 et seq.). On or before January 1, 2018, a community college that does not participate in the federal loan program shall be provisionally eligible to participate in the California College Promise for one calendar year. The community college shall comply with the federal loan participation requirements in order to participate in the California College Promise on or after January 1, 2019.

76396.3. (a) A community college that has been certified by the chancellor as meeting the requirements established under Section 76396.2 shall receive funding pursuant to Section 76396.

(b) The community college may use funding appropriated pursuant to this article to waive some or all of the fees for first-time community college students who are enrolled at the college full time, and complete and submit either a Free Application for Federal Student Aid or a California Dream Act application. A fee waiver that a student receives pursuant to this subdivision shall only be for one academic year and fees shall only be waived for the summer term and each semester or quarter of that year in which the student maintains full-time status. A fee waiver provided pursuant to this subdivision shall not be available to a student who is charged a tuition fee pursuant to Section 76140.

(c) For purposes of this section, the following terms have the following meanings:

(1) “Full time” means 12 or more semester units or the equivalent.
(2) "One academic year" means the total of the summer term that immediately precedes the first semester or quarter of the fall term, and the two consecutive semesters or three quarters that immediately follow that summer term. Each semester or quarter is approximately the same length.

(d) It is the intent of the Legislature that funding provided to support the California College Promise be used by the community college to advance the goals outlined in Section 76396.1.

76396.4. The board of governors may adopt regulations implementing this section.
Expanding Opportunity, Reducing Debt
Reforming California Student Aid
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Summary

Under a contract with the California Student Aid Commission, The Century Foundation (TCF) has been tasked with “identifying options for improving affordability at California colleges and universities,” and suggesting ways to streamline and consolidate existing programs “to reduce current students’ cost of attendance, thus reducing or eliminating the need to rely on student loan debt.”

The project team interviewed more than fifty stakeholders, including representatives from college access organizations, K-12 education, all of the higher education segments, several state agencies including the legislature, and others. Our recommendations focus on two major reforms: (1) consolidating the Cal Grant, while taking phased steps to improve overall affordability for low-income and middle-income students so that students have an option to take on little or no debt, and (2) scaling CSAC’s role in providing early, clear information to the public about student aid.

First, we recommend that California shift from a tuition-centric aid system to one that takes into consideration each student’s full college expenses when determining award
levels. As part of that shift, we recommend updating the measurement of “need” and the related expected family contributions to be both more consistent across institutions and more realistic, particularly for low- and middle-income families, given the cost of living in California.

In order to accomplish this, the legislature would need to combine the major CSAC programs into one Cal Grant entitlement that would be available without regard to students’ age, time out of high school, high school GPA, or other factors that have severely complicated administration of, and communication about, Cal Grants. In addition, and over a reasonable time frame, the legislature would increase investment to better account for the total cost of attendance and to minimize both the debt and the in-school earnings Californians need to complete college. The legislature would implement the new aid system in three steps:

1. **Consolidate the Cal Grant and connect award level to the Expected Family Contribution (EFC).** In Step 1, the legislature would broaden Cal Grant eligibility by combining all versions of the grant and eliminating current restrictions based on age, time out of high school, and GPA. A student’s amount of aid would take into consideration all college expenses rather than just tuition and fees. Institutional aid would supplement the Cal Grant at the University of California (UC) and the California State University (CSU) system and at many private colleges. We project Step 1 would begin to reduce students’ need for excessive work or loans at CSU campuses and community colleges. To ensure that students continue to have quality choices, students could use a Cal Grant at any private college that can meet quality assurance standards.

2. **Using updated EFC and cost of attendance methodology, set the Cal Grant award level to meet affordability targets.** In Step 2, CSAC would address the mismatch between the high cost of living in California and the federal EFC assumptions that low- and middle-income families face. Additional grant aid would make it possible for more students to focus on their education rather than on work, or risk their future by taking on problematic forms of debt.

3. **Expand the Cal Grant to reduce or eliminate the need for loans.** In Step 3, the state would continue to use reformed estimated cost of attendance and financial need calculations and provide adequate funding to reduce or eliminate students’ need for loans or excessive work. Depending on a students’ ability or desire to work, Step 3 would provide most students with a pathway to a debt-free degree.

Even as the legislature partners with CSAC to develop these steps toward greater affordability, we propose that they also launch a Fund for Innovation in College Affordability, so that CSAC can pilot and study approaches to addressing students’ specific challenges and identify areas to gain efficiencies that reduce the cost of attendance. For example, CSAC could explore initiatives such as providing transportation vouchers, offering free meals on campus (at least in the initial weeks) for new students at community colleges, pre-purchasing textbooks for key courses, expanding work-study opportunities, arranging for child care, or funding emergency aid program to cover unforeseen student needs. CSAC would expand any successful financial aid interventions in Step 3.

Second, we recommend that CSAC pursue a parallel reform track toward a modernized, technology-savvy approach to information and advising. We propose an upgrade to CSAC’s web presence, building online capabilities and a partnership with the state Franchise Tax Board to allow students to easily obtain personalized estimates of their aid eligibility and to compare aid award letters, and an increased role in advising and college savings initiatives. CSAC might, for example, work with administrators of Scholarshare, the California college savings plan, to develop communication strategies to encourage participation. This role will require a significant focus on public communications and outreach, building on CSAC’s existing outreach programs, to bring a sophisticated approach to reaching millions of students and families across the state.

Attachment 1.1
Three Steps to Expanding Opportunity and Reducing Student Debt

<table>
<thead>
<tr>
<th>STATUS QUO</th>
<th>STEP 1</th>
<th>STEP 2</th>
<th>STEP 3</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Reconfigure the Cal Grant</td>
<td>Implement Revised Measures of Expenses and Need</td>
<td>Expand the Cal Grant to Meet Need</td>
</tr>
<tr>
<td>Aid programs are very complicated to explain and administer</td>
<td>Broaden and strengthen the Cal Grant</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aid amounts are linked to tuition even though expenses go far beyond</td>
<td>Link aid to unmet need instead of tuition, providing enough funding to meet an initial affordability target</td>
<td>Increase funding to meet revised affordability targets</td>
<td>Provide funding to reduce or eliminate need for loans</td>
</tr>
<tr>
<td>The measure of family ability-to-pay (EFC) is frequently unrealistic</td>
<td>Develop revised measure to account for high cost of living in California</td>
<td>Reduce EFCs to account for higher cost of living</td>
<td></td>
</tr>
<tr>
<td>Aid available to community college students very limited</td>
<td>Expand Cal Grant availability</td>
<td>Adjust funding to account for revised EFC and cost measures</td>
<td>Provide funding to reduce or eliminate need for loans</td>
</tr>
<tr>
<td>Estimates of non-tuition expense can be unreliable and inconsistent, and can create counterproductive incentives</td>
<td>Study non-tuition expenses and incentives, develop methodology for estimates</td>
<td>Implement new standardized cost-of-attendance methodology across sectors</td>
<td></td>
</tr>
<tr>
<td>Perspectives regarding the role of loans vary widely among colleges and aid professionals</td>
<td>Examine the role of work and loans, and develop revised affordability targets</td>
<td>Implement revised affordability targets as part of aid estimates and award letters</td>
<td>Refine approach regarding the role of loans</td>
</tr>
</tbody>
</table>
## Nine Additional Steps to Remove Barriers to Access and Affordability

<table>
<thead>
<tr>
<th>STATUS QUO</th>
<th>RECOMMENDATION</th>
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</thead>
<tbody>
<tr>
<td>Adults who are considering returning to school have little access to reliable information about aid</td>
<td>Provide adults with access to reliable, comparative expense-and-aid information; Include certificate options in college price comparisons, and in advising</td>
</tr>
<tr>
<td>The reach of aid is frequently inadequate and/or too late to address barriers or influence plans and choices</td>
<td>Test and evaluate innovative approaches to aid. Implement large-scale pilots of outreach, advising, textbook provision, free meals for the first month of school, assistance accessing public assistance, and other efforts to address specific needs; Use lessons from pilots to inform design of aid</td>
</tr>
<tr>
<td>Aid programs strongly emphasize BA over other options</td>
<td>Allow Cal Grant for programs as short as four months (consistent with Pell Grants)</td>
</tr>
<tr>
<td>Fixed grant amount is awkward fit for widely divergent value of private college options</td>
<td>Expand Cal Grant availability, and implement value measures</td>
</tr>
<tr>
<td>Aid programs are very complicated to explain and administer</td>
<td>Broaden and strengthen the Cal Grant</td>
</tr>
<tr>
<td>Colleges’ estimates of price and aid can be difficult to access and even harder to compare</td>
<td>Provide families with early, reliable, comparative expense-and-aid information</td>
</tr>
<tr>
<td>Colleges’ award letters are often difficult to decipher and compare</td>
<td>Identify or develop a web-based award comparison tool; Link schools’ awards to comparison tool</td>
</tr>
<tr>
<td>Too few counselors available to provide reliable financial aid advising</td>
<td>Upgrade website to make personalized information about aid prominent; expand CSAC financial aid advising capacity</td>
</tr>
<tr>
<td>Some families that could save for college, don’t</td>
<td>Reach out to families when children are young to encourage them to plan for college</td>
</tr>
</tbody>
</table>
Broaden and Strengthen the Cal Grant

Frequently, and especially at public institutions, students’ greatest needs are not related to tuition, but instead are generated by other expenses, such as books, food, housing, and transportation. The bulk of CSAC aid, however, is linked simply to tuition prices, without taking into consideration the full set of expenses students face in order to commit themselves to their studies. At the same time, the current Cal Grant includes a patchwork of grant types (A, B, C, and both entitlement and competitive grants) with a variety of eligibility requirements that create complexities for students, CSAC, and schools. The resulting aid system is too difficult to understand, and in some cases, creates cliff effects for students and families, or fails to reach students who have significant need.

We recommend consolidating the current grant types to one Cal Grant, while at the same time shifting from the current tuition-centered approach to one that focuses on the unmet needs that students face, including tuition and other expenses. To adequately address those needs, the federal methodology that is used to determine both a student’s or family’s ability-to-pay and the expenses they will face will need to be refined to better align the expectations of low-income and middle-class family contributions with the high cost of living in California.

At UC and CSU, simplifying the Cal Grant is made easier and less costly by the fact that those two systems supplement the Cal Grant with considerable amounts of institutional aid. At the UC in particular, delinking the Cal Grant from tuition and moving to meet need will require a rearrangement of aid between the Cal Grant and institutional aid, but not significantly more resources. At the CSU, meeting need over time will require some additional state investment. The needs of community college students are substantial and will also require additional investment. Over time, the legislature should increase the Cal Grant enough so that, combined with Pell and institutional aid, students at UCs, CSUs, and community colleges would have a viable pathway to attaining a degree with no or little debt.

Closing eligibility gaps and connecting the Cal Grant to need requires a new approach at private colleges as well. We recommend setting the Cal Grant for private, nonprofit colleges at the maximum set for a UC Cal Grant, but taking steps to ensure that the state is not overpaying, given what students are getting.

Step 1: Reconfigure the Cal Grant

In Step 1 of our recommended plan, the legislature would replace the age, GPA, time-out-of-school, income, and asset requirements with a simple consideration of Expected Family Contribution (EFC), as determined through the FAFSA. Including age and GPA requirements makes little sense from a policy perspective - it leaves out thousands of adult students with need and adds dual, often inequitable academic requirements on top of school admission standards. We project that, if the legislature removed these unnecessary eligibility requirements, hundreds of thousands of students would become eligible for the new Cal Grant.

At UC campuses, CSAC would award a Cal Grant to all low-income and middle-income California resident undergraduate students, rather than just some. And rather than going mostly to students left out by the current Cal Grants, institutional aid instead would be provided to all eligible students on top of the Cal Grant, rather than mostly to students who were denied a Cal Grant. However, because the Cal State system is currently unable to cover all denied students through the State University Grant (SUG), the legislature would need to appropriate additional funding to ensure that, for each student, the Cal Grant and the SUG grant combine to provide the necessary level of aid. These investments mean that Step 1 would begin to reduce students’ reliance on debt at CSUs and academically harmful levels of work at both CSUs and community colleges.
There are a couple of different ways that this broadening of the Cal Grant at UC and CSU could be achieved; both should aim for the Step 1 affordability target: a limit on the amount of “self help” funds from work and/or loans expected from any California resident student. (For Step 1, we recommend a level no higher than the current UC guideline of $11,000.) The most viable method is probably to spread and stack. Under this approach, both the Cal Grant and institutional aid would be spread, based on need, across the broad population of California residents, with the maximum Cal Grant set and funded at a level such that the combination of all grant aid meets the affordability target. One downside of this approach is that at current funding levels the Cal Grant portion would wind up being lower than tuition, creating the false impression that grant aid had been cut. We recommend addressing this by having the institutions provide a match so that the Cal Grant is at the tuition level. Institutional aid would be stacked on top, addressing non-tuition expenses.

A second approach would be for the legislature to combine CSAC-provided grants and institutional grants into single grants that meet or approach the affordability target.

Both approaches base the Cal Grant award on the goal of providing enough grant aid to meet an affordability target that takes into account all college expenses rather than just tuition. While basing the grant on tuition provides a simple message, students face a much broader range of costs—fees, housing, food, books, supplies, and transportation—that ultimately determine whether college is affordable for them or not.

Community College Students

Community colleges enroll more low-income Pell Grant recipients than do CSU, UC, and California’s nonprofit colleges combined. Yet CSAC’s aid programs currently provide little support to community college students, and the community colleges lack the means to generate institutional aid in the way that UC and CSU do. While we view Step 1 of our reform proposal to be largely a rearrangement of aid to students attending UC and a modest increase in aid for CSU students, we recommend a significant expansion of aid at the community colleges. Taking into consideration a student’s full estimated cost of attendance, the legislature should provide a Cal Grant Award to community college students for whom the Pell Grant (if any) and their EFC leaves more than $8,000 of unmet need.

The strict four-year duration of the Cal Grant creates complications for community college students, who frequently find that there are additional courses they need either before or after transfer. Using up more than two years of their eligibility at the community college, however, means they do not have even two years of aid left for the four-year institution. The legislature should consider providing an additional semester or two of eligibility to address this problem.

Additional Eligibility Changes

We recommend that when the legislature consolidates the Cal Grant and removes age, time-out-of-school, GPA, and non-EFC income and asset requirements, it also harmonizes eligibility with most aspects of the Federal Pell Grant program. Cal Grants would be:

+ based on the EFC rather than separate income and asset cutoffs;
+ available to transfer students, whenever they transfer;
+ available for any degree or certificate program that is Pell eligible (which includes programs as short as about a semester); fully available in the freshman year; and
+ based on a requirement that recipients make satisfactory academic progress, but with no specific grade point or test requirement for initial eligibility (other than what is required to be admitted to the college).
However, we recommend the Cal Grant maintain some differences from the Pell Grant program. The legislature should make Cal Grants:

+ available for the equivalent of two years at a community college and four years total (rather than the Pell Grant’s six years);⁹
+ available only to California residents; include Dreamers;⁹
+ tailored to specific institutions or segments; and
+ reach higher levels of family income than Pell grants.

We recommend seeking additional input on other aspects of alignment with Pell grants, including availability to students without a high school diploma (in limited circumstances consistent with federal ability-to-benefit provisions); allowing for acceleration, as “summer Pell” does; and eliminating or changing the March and September application deadlines.

Step 2: Implement Revised Measures of Expenses and Need

Under Step 1, the level of the Cal Grant would be based on aiming for the current affordability target at both UC and CSU, and expanding Cal Grants to far more community college students also based on current need measures. Under Step 2, the state would implement revised measures of available family resources and expenses, and would establish the Cal Grant level and affordability targets based on those revised measures.¹⁰

Revise the Expected Family Contribution

Many Californians live in high-cost areas. But federal estimates of family resources available for college (the EFCs) do not take into account geographic differences in cost of living, making them potentially unreliable for many low-income and middle-class Californians. For example, a family of four earning $90,000 in expensive areas of California faces far higher housing costs than a family of four in other parts of the country. At least one state has taken steps to address this flaw: for its state aid, Maryland uses an EFC that is adjusted based on regional cost of living differences.¹¹

We recommend that CSAC analyze the question of adjustments to the federal EFC during Step 1, and implement a revised version of the EFC in Step 2 to use in determining state aid. One regional approach to consider is to use the “commuting zones,” developed as an alternative

### TABLE 1

| Grant Aid at California’s Public Institutions Currently Totals More Than $6.5 Billion (dollars in millions)² |
|-------------------------------------------------|-------------------------------------------------|-------------------------------------------------|
| **University of California system** | **California State University system** | **California Community Colleges** |
| Undergraduate enrollment (full-time equivalent) | 220,000 | 360,000 | 800,000 |
| Federal Pell Grants | $380 | $960 | $1,600 |
| Cal Grants | $890 | $610 | $100 |
| Institutional Aid | $740 | $600 | $800 |

Note: Community college institutional aid includes BOG fee waiver. Source: U.S. Department of Education (Federal Student Aid, and the National Center for Education Statistics, California Legislative Analyst’s Office, California Student Aid Commission, University of California Office of the President, California State University).
to political boundaries. The regional difference in cost of living could easily be inserted into the appropriate place in the federal formula used to determine financial need.

The revised EFC would not apply to federal aid, but developing and using a better approach for state aid establishes a foundation for a possible change at the federal level in a future reauthorization of the federal Higher Education Act.

**Standardize Cost of Attendance Estimates**

CSAC should establish a standardized methodology—one that takes regional cost of living differences into account—to determine the cost of attendance (COA). Doing so will ensure both that students receive aid that more consistently addresses the costs they face and that the new system does not create problematic incentives when schools set costs.

There are currently wide variations in calculating student budgets by institution and sector. For example, the UC system accounts for housing and food costs that students incur when living at home with parents, recognizing that many students must still contribute to the household. The CSU system does not seem to account for those costs at all. Budgets for books and supplies also vary widely across institutions. It is an important role for CSAC, which should examine students’ actual experiences, to make recommendations for improving the accuracy of the estimates, work with institutions to use new estimates, and oversee the implementation of these more standardized COA estimates across the public system.

One of the hazards of pegging a grant to a cost of attendance as defined by the institution is that it can encourage (or at least fail to discourage) institutions to offer or require costly components, such as expensive dorms or high-priced textbooks. Alternatively, institutions may lowball certain cost-of-attendance figures to make the college seem more affordable than it really is, if they are trying to meet affordability targets. Under a standardized approach, an institution that manages to keep dorm costs low would not have aid taken away from students; instead, CSAC’s comparison tools would flag that the institution is more affordable than other institutions. Likewise, an institution that has instituted programs of free or low-cost textbooks or computers will be able to show that available aid goes farther than at schools with higher costs.

Depending on how cost of living is set, a more standardized system may also create unintended consequences for the ways in which students make decisions. For example, the new system should not structure cost of living budgets in a way that might discourage a student from economizing and living at home if they had planned to do so. CSAC would need to address those kinds of challenges in building the cost of attendance methodology. More detailed recommendations on how to do that are included in Appendix 7.

**Step 3: Expand the Cal Grant to Reduce or Eliminate the Need for Loans**

In Step 3, CSAC would analyze the changes to the EFC and cost of attendance and adjust further, if necessary. Meanwhile, we recommend that CSAC experiment with ways of providing for students’ needs (see the Fund for Innovation in College Affordability below), leading to possible suggestions for altering approaches to aid in a particular segment or more broadly. Finally, based on an analysis of the gaps that remain in the system of financial aid, in Step 3, the legislature would provide the funding to reduce or eliminate the “loan and work expectation” in the system, providing a pathway to a degree with no or little debt for most students.

It is important to note that, even if the legislature provided enough funds to eliminate the calculated need for loans, loans would still be necessary in the system. Students may choose to borrow instead of working the hours assumed in self-help work expectations, and it may be difficult for some students, particularly in certain regions, to schedule the work hours needed or to find full-time work over the summer, for example. Students may choose a more expensive dorm or meal plan, or accept an unpaid summer internship rather than work to earn money for college expenses. And parents of dependent students may not be able or willing to fund
FIGURE 1
Many Low- and Middle-Income Californians Are Denied Cal Grants

FIGURE 2
UC Often Provides Grants to Students Denied Cal Grants
FIGURE 3
Under Step 1 the Cal Grant Would Be Provided More Broadly, with UC Aid as a Supplement

FIGURE 4
In Steps 2 and 3, Additional Funding Would Support More Non-Tuition Expenses
their full calculated EFCs. CSAC should consider playing a role in ensuring that the loans that students do take out are fair and manageable.

II. Spur Innovation and Support Quality Choices

While college affordability is about money, it is also about choices that colleges and students make. Nudging those choices in constructive directions may require CSAC and the legislature to take new approaches. Here we suggest some shifts to consider, and recommend creating the capacity to test innovative approaches.

Not Just Bachelor’s Degrees!

Currently the Cal Grant is geared almost exclusively to four-year degrees, except for the very small Cal Grant C program. We recommend that the Cal Grant at community colleges allow and even encourage the completion of certificate and associate’s degree programs, whether vocational or transfer-oriented. Furthermore, students who use a year or two of their Cal Grant eligibility for those programs should be able to claim the remainder of their four years of Cal Grants at a four-year college, whether or not that was their original intention.

Experiment with Innovative Approaches to Aid

Even as the legislature and CSAC pursue a phased approach to delinking the Cal Grant from tuition and connecting it to unmet need, and then updating the EFC and standardizing cost of attendance estimates, CSAC and schools should continue to pursue additional ways in which to bring down costs in the system and best serve low-income students. We recommend that during Step 1, the state make a large, nonrecurring investment in a Fund for Innovation in College Affordability. The fund would be used to test and evaluate creative approaches to providing aid to low-income or struggling students. These pilots are particularly needed at community colleges, but should not necessarily be restricted to that segment.

An important value of California community colleges—and one that the legislature should maintain—is their open, “ungated” design. They are for anyone who wants a formal learning opportunity, whether as part of a plan hatched in high school, the sudden result of a disruptive event such as losing a job, or a simple impulse to give college a try. But this open door policy often means that entering students have not completed all of the paperwork needed for aid. The state could use this fund to pilot various approaches to the challenge of walk-on students, such as first-term-first-day textbook programs for all students, free meals for the first month of classes, transportation buddy programs, and other initiatives.

As CSAC and campuses learn from these approaches over time, in Step 3, it may be appropriate to replace traditional aid approaches with different designs in some circumstances (for example, having arranged meals for community colleges at the beginning of the term, or pre-purchasing textbooks for common first-term classes).

Cal Grants at Private Colleges

We recommend that CSAC allow students to use these new Cal Grants at private colleges—as they currently do—but also recommend that CSAC ensure that the amount of the grant is not excessive, given the school’s spending on student instruction.

Public vs. Private Institutions

At California’s public institutions, the state has direct or indirect control over every aspect of the colleges’ operations. There is an annual negotiation over funding levels, but ultimately, state administrators determine the number of California residents who will be served, the level of enrollment of low-income students, the level of core support provided through appropriations, the tuition to be charged, the Cal Grant that helps some students pay tuition, and the amounts and targets of institutional aid. For the most part, salaries and budgets are transparent, and virtually everything the institutions do is subject to a potential state audit.
In short, in the context of the public institutions, the chance of public debate about the colleges’ spending decisions is high, but the hazard of the public purse being unwittingly taken advantage of is relatively low.

With institutions not operated directly or indirectly by the state, however, there is the potential for a third-party-payer problem: it is difficult for the payer to hold the institution accountable, leaving taxpayers and the students vulnerable. Should private colleges make any particular affordability commitment to students receiving state aid? Should highly selective institutions be expected to enroll a critical mass of low-income students, or community college transfers, to be eligible for state support? What level of quality should be expected for the state investment? We recommend that, at a minimum, the state attempt to address the latter question, assuring that a school is providing value for the money.

**Strengthening Protections for California’s Expanded Investment**

The original purpose of the Cal Grant program included tapping the private nonprofit colleges at a time when the public four-year institutions did not have the space for every eligible Californian. Many colleges are serving exactly that role—and while a few outlier private colleges have very large endowments that they could use to support low-income students, most do not. At the same time, there is a wide range of variability in the return that the state is getting on their Cal Grant investment: while many colleges spend far more per student on instruction than they receive in Cal Grant funds, at some colleges, the Cal Grant exceeds the amount spent per student on instruction by more than a factor of two, suggesting that taxpayers may be overpaying. Expanding Cal Grant eligibility means an increase in the potential taxpayer cost and risks beyond the current system.

CSAC should continue to provide Cal Grants to students attending private nonprofit colleges, and set the maximum award based on the Cal Grant for UC (depending on how it is designed). In order to ensure that student aid dollars are going to the intended target—teaching and supporting students—the award amount should not be higher than an institution’s average per-student spending on instruction. Institutions are already required to report those instructional cost numbers to the federal government.

CSAC could, over time, research and assess alternative protections for the state’s investment. For example, CSAC could consider limiting Cal Grant usage at private colleges to those that have demonstrated that their tuition price is not based on aid availability. A different approach could be to offer Cal Grants only to students who demonstrated enough academic preparedness that they were admitted to at least one CSU or UC, or demonstrated that they compared their options by applying to CSU or UC. This would, in effect, mean that the state would rely on public community colleges to serve as the state’s open access institutions.

The Cal Grant is currently restricted to private colleges located in California. Opening up the program to colleges across the country would present a major oversight burden on CSAC, and would provide little added benefit in terms of the diversity of choices available to students. One possible exception, however, is HBCUs, which advisors told us are of particular interest to some African-American high school students. We suggest CSAC explore the idea of HBCU eligibility for Cal Grants in some circumstances, perhaps starting with transfer students.

**For-Profit Colleges and Similar Institutions**

The financial restrictions and accountability requirements of public and nonprofit institutions have long been successful regulations in terms of preventing consumer abuses. The financial incentives that can drive for-profit institutions to become predatory are restrained at public and nonprofit institutions, where trustees cannot have a financial interest in the schools’ profit margins, and revenues must be reinvested toward the school’s educational or public-serving mission. Absent these restraints, enrollment at for-profit institutions, particularly when financed by third parties through government grants and loans, disproportionately leads to...
+ **Decreased student earnings:** On average, students attending for-profit programs have a negative return to attending college, according to one study. And, those that were employed after leaving college earned less than if they had gotten a job and not enrolled.

+ **Growing debt balances:** Nearly three-quarters of students who borrowed federal loans to attend for-profit colleges owe more on their loans two years after leaving school than they did when they left, due to accrued interest and fees. Even among graduates, only 36 percent of federal student loan borrowers from for-profit colleges have made a dent in their debt three years after leaving college—half the rate of graduates from public or nonprofit colleges (71 and 74 percent, respectively).

+ **Unmanageable debt loads:** Federal standards measure whether the debt loads of career education program graduates are reasonable given their post-college earnings. Because they typically have higher costs and lead to lower graduate earnings, virtually all (98 percent) of the programs that fail this test are at for-profit colleges. (More than a third of the rated programs were offered by nonprofit or public institutions.)

+ **Loan default:** For-profit colleges account for one-third of federal student loan defaults, despite enrolling just 9 percent of students. Of students who borrowed at for-profit colleges in 2003–04, for example, more than half had defaulted during the twelve years that followed.

+ **Student deception:** Borrowers who have been misled, defrauded, or otherwise wronged by their college can petition to have their federal loans discharged. Former for-profit college students account for 99 percent of all such discharge applications.18

If there are reasons to risk tax dollars on institutions that choose to operate as for-profit entities, the current grant level and consumer protections should be maintained while the state considers additional provisions to ensure that students and taxpayers are receiving adequate value. Furthermore, if an institution claims to be nonprofit, CSAC should ensure that it is complying with the requirement that all revenue be dedicated to educational or charitable expenses, and no trustee or key employee is taking the equivalent of profits.

### III. Provide Better and Earlier Information

We recommend that CSAC significantly scale its role in providing personalized, easy-to-understand information to students and families across California. Specifically, we recommend that CSAC modernize its website, make available information about aid personalized and easy to find and understand, and create the functionality to allow students to easily compare financial aid award letters. Doing so will complement changes in the aid program discussed earlier, but could have a significant effect on college-going across the state even without changes to the Cal Grant.

**Background**

Compared to other states, California does a commendable job of making college affordable. Tuition for in-state community college students is the lowest in the country, and is waived for almost half of students. Tuition is also relatively low in the nation’s largest four-year public system, the California State University (CSU) system. Average tuition and fees at public master’s universities across the nation are $8,670 in 2017–18. CSU charges about $6,600. Even at the University of California, with tuition and fees of about $14,000, compared with an average of $10,830 for public doctoral universities nationally, the combination of Cal Grant awards and institutional aid results in net prices and student loan debt levels that are below the national average.

Providing aid to needy students who have already made their decisions about where and how to enroll in college will reduce the need to work long hours and borrow, and can enhance the likelihood that students succeed. But a financial aid system has an important role to play before matriculation: to influence those decisions in the first place, by making it possible for students to enroll at the colleges...
that best fit their needs and interests, to work less in college so that they can study more, to get the computer equipment and textbooks they need without delay, and not to be distracted by difficulties addressing basic needs, such as food or adequate housing.

Many students and parents dramatically overestimate the price of postsecondary education.19 Showing them their estimated aid and net price and helping them apply for aid makes them more likely to complete the aid application process for aid and enroll in college.20

The college expenses that a family will face should not be a mystery that is revealed months after the college application deadlines and only days before they have to make decisions. Families, especially those of limited means, need reliable information, personalized to their financial situations, at least as early as a child’s junior year in high school, and ideally even earlier. Adults without a college degree, too, need to be able to get information about aid without relying on recruiters who may not always have the students’ best interests in mind.

Create a User-Friendly Website

We recommend CSAC update its website to make more personalized and complete information a prominent feature. As possible models, the financial aid agencies of Ontario, Canada,21 and Oregon22 are noteworthy for their simplicity, thoroughness, and usability. These websites also allow users to easily create good estimates of expected financial aid and total price of attendance before and after aid and direct them to apply for aid. The home page of the Ontario Student Assistance Program features a questionnaire that quickly estimates financial aid and net price of attendance after users enter seven elements of information: high school graduation year, marital status, number of children, approximate parental income, institution type, year expected to start postsecondary education, and whether the student will live at home with a parent (see Figure 5). In addition to these estimates, the website displays a link to apply for financial aid.

The Ontario calculator has a list of incomes to choose from in wide bands (though each is represented by a single number), so users do not need to know the precise amount. To illustrate, Figure 6 shows the initial financial aid and net price estimate that appears if users identify as a current high school senior (the default option) with a parental income around $50,000 (Canadian), planning to attend a university (as opposed to a college or private career college). This estimate appears after users enters only two pieces of information. The values adjust if and when users select other options, such as a different school year or living arrangement.

Figure 7 shows the results of a “precise estimate” for a dependent student with an income of $55,000 planning to attend McMaster University as a freshman in computer science. The functionality is similar to the net price calculators provided by most U.S. institutions as required by the Higher Education Opportunity Act of 2008.23 In the Ontario case, however, the calculator is provided by a government agency that allows users to generate estimates for multiple institutions from the same website, whereas users in the United States must visit individual institutions’ websites or perhaps use a third-party service that aggregates estimates across multiple institutions.24

In addition to making CSAC’s website more user-friendly, there needs to be more coordination across state agencies in terms of information about college options and financial aid. Figure 8 shows a website launched recently by the California state agency that assists students who have been the victims of predatory postsecondary schools. With links for “student assistance” and “researching colleges,” it could easily be confused as the place to go for information about college options in the state and how to pay for them.

Make Estimates and Comparisons Easier

California should go further than Ontario in the college price and aid information it makes available to its residents. First, the state should develop a partnership with the California Franchise Tax Board, working with them to add a simple check-box to the state income tax form requesting a financial aid estimate for a child or for an adult. Just with the information available to the state on the income tax form, CSAC would be able to produce a fairly precise financial aid estimate for most families in the state.
FIGURE 5
Ontario Student Assistance Program Home Page (partial screenshot)


FIGURE 6
Ontario Student Assistance Program Initial Financial Aid Estimate (partial screenshot)

FIGURE 7
Ontario Student Assistance Program Precise Financial Aid Estimate (partial screenshot)

![Ontario Student Assistance Program Precise Financial Aid Estimate](attachment:image)


FIGURE 8
A Website Operated by California’s Bureau for Private Postsecondary Education Could Easily Be Confused for CSAC

![A Website Operated by California’s Bureau for Private Postsecondary Education Could Easily Be Confused for CSAC](attachment:image)

Second, CSAC should also provide estimates for multiple sample institutions, such as a nearby community college, a CSU campus, a UC, and, if possible, a private nonprofit college. Our research showed that many low-income families do not know, or do not believe, that tuition costs at four-year colleges, after aid, may be as low as those at community colleges. Estimates could even include information about certificate programs below the baccalaureate level, particularly relevant for adults already in the workforce.

Providing personalized, comparative aid estimates can help to expand the options that low-income families consider. The information must be provided early, though, so that the students do not miss required courses or admissions application deadlines.

Improve and Compare Financial Aid Award Letters

CSAC should use this improved web presence to allow students to compare aid awards across institutions. Award letters are often difficult to decipher and compare; at times, different schools might call the same grant by different names, or even make it hard for students to determine which award is a grant and which is a loan. CSAC should consider building the functionality within its web portal that would require schools to enter their aid award information into a predetermined format in order to participate in the Cal Grant program. Students could then login into their personal CSAC page to easily compare aid awards. Doing so would also allow CSAC to analyze aid data over time and better understand which students face gaps within sectors across the state.

Follow Up with Assistance and Advising

CSAC can do more than provide information about colleges, aid, and prices by supporting students through the aid application and enrollment processes. As increasing amounts of information about individual institutions and programs become available online, students need more than just better information: they need guidance in choosing appropriate paths given their goals, academic preparation, and circumstances. But many institutions, particularly public high schools, are insufficiently staffed to provide such support, with student-to-counselor ratios as high as 1,500-to-1.25

Evidence is mounting that simple, low-to-modest-cost coaching interventions that reach out to students during the summer after high school and throughout the first year of college can have substantial effects on enrollment
and persistence. For example, a series of randomized experiments found that text messaging, peer mentoring, and proactive outreach were all successful at reducing “summer melt”—students who secure enrollment but never show up—with costs of no more than $200 per student served. While personalized services would be more expensive, existing research suggests the impact may justify the cost.  

Prior to enrollment, coaching services may help students interpret aid award letters and prioritize tasks and paperwork required to complete the enrollment process.  

CSAC should pilot low-cost initiatives to identify successful interventions, starting with a focus on students likely to have the greatest financial need, as identified through CSAC’s partnership with the state Franchise Tax Board.  

Encourage and Facilitate Saving for College  

Helping a low-income family with young children to open a college savings account can be an effective way of encouraging the parents to assume that college is in the child’s future, and to start setting aside money so that it can grow with interest. The San Francisco Unified School District puts $50 into an account for every kindergartner, and similar programs are being considered in other cities. There is still much to learn about the potential impact and optimal design of these types of programs. CSAC should partner with these efforts to provide useful information about college costs and aid, and to identify and test ways to inform college plans in the years between kindergarten and the senior year of high school.  

Low-income families should not be the only targets of college-savings efforts. Middle- and higher-income families frequently feel the squeeze of college costs and realize they should have saved more during the prior decade. And low-income families do not have much disposable income to draw on for savings, while higher income families do. By encouraging saving by higher income families CSAC would be helping to address college affordability challenges well into the future. At a minimum, information could be provided through the partnership with the Franchise Tax Board.

Notes

1 More than a third of California community college students live at home with a parent, though many of those students still have substantial expenses and may be expected to help support the household. One-third figure based on an analysis of the data from NPSAS 2007–8. 35 percent of California community college student lived at home with a parent. NPSAS08 results (translating to about 699,000 out of 2,018,000 students that year).  
2 Pell Grant figures are totals from U.S. Department of Education school data for 2015–16 (California for-profit colleges receive $575 million and nonprofits $250 million). Cal Grant data are from CSAC for 2017–18; an additional $230 million goes to private colleges. FTES enrollment figures are from UCOP and CSU reports and, for the community colleges, the National Center for Education Statistics (https://nces.ed.gov/programs/digest/d16/tables/dt16_307.20.asp).  
3 “Creating a Debt-Free College Program,” Legislative Analyst Office, January 31, 2017, http://www.lao.ca.gov/Publications/Report/3540. Figures are for the UC Grant (at UC), State University Grant (at CSU), and the Promise (BOG waiver) and Success/Completion grants at the community colleges.  
4 Technically, we are recommending that grant levels be based on a student “self-help” (work and/or loan) expectation that is equal to their cost of attendance minus the parent portion of their EFC (or the EFC itself for independent students). If the student contribution portion of the EFC is higher than the self-help expectation, then the self-help is increased to the student contribution.  
6 Of Pell recipients at California institutions, the community colleges account for 47 percent; CSU 22 percent; UC 7 percent; nonprofit colleges 6 percent; and for-profit schools 16 percent, according to our analysis of U.S. Department of Education data. The community colleges have a student headcount of 2.1 million, compared to 755,000 for UC and CSU combined. “Table 308.10. Total 12-month enrollment in degree-granting postsecondary institutions, by control and level of institution and state or jurisdiction: 2013–14 and 2014–15,” National Center for Education Statistics, https://nces.ed.gov/programs/digest/d16/tables/dt16_308.10.asp?current=yes.  
7 Based on the assumption of working fifteen hours a week during the school year, and summer earnings or a subsidized loan of $3,500.  
8 If funding is available, eligibility should be extended, especially for students starting at a community college. The limit of two years at community colleges is to prevent students from accidentally using too much of their eligibility prior to transferring.  
9 Competitive Cal Grants are currently not available to Dreamers. By expanding the Cal Grant to all eligible students, Dreamers would be able to receive the aid also.  
10 The grant would be set as follows:  
   Cal Grant = COA - revised EFC(PC) - Pell (if any) - specified self-help expectation  
The approach automatically results in a phase-out as incomes increase, preventing any cliff effects. The formula would look the same across public segments. The target would likely be consistent across the segments, although it could make sense to have lower loan expectations at less selective institutions. If funds are not adequate to reach “affordability” then the target should be set at a dollar amount above that level (not a proportion).  
13 The “Income Protection Allowance” and associated tables could be adjusted. Alternatively, EFCs could be reduced by a particular dollar amount.  
14 See the relevant appendix for a more detailed discussion of this issue.  
15 Under this approach, tuition above a particular level would need to be market-validated: there would need to be students, employers, or private scholarship programs paying the tuition price without federal grants and student loans, veterans benefits, the Cal Grant, or a discount from the institution.  
participating-colleges-universities.


21 See the website of the Ontario Student Assistance Program, https://www.ontario.ca/page/osap-ontario-student-assistance-program.

22 See the website of Oregon’s Higher Education Coordinating Commission, Office of Student Access and Completion, https://oregonstudentaid.gov.


29 Information about San Francisco’s program is available at https://sfgov.org/ofe/k2c.

Expanding Opportunity, Reducing Debt
Reforming California Student Aid

APPENDICES

APRIL 2018 — THE CENTURY FOUNDATION
ROBERT SHIREMAN, SANDY BAUM, AND JENNIFER MISHORY
APPENDIX 1
Fiscal Analysis

As a part of our recommendations, we worked with CSAC, institutions, and RTI International to analyze the cost of our proposals. However, the challenges in obtaining data limited our options for crafting those estimates. We can begin to understand likely cost drivers and ascertain imprecise ranges, but cannot provide reliable cost estimates for all aspects of our recommendations.

Background on Data Constraints

A reliable estimate of the costs of a change in financial aid policy is best conducted with a database that includes all students who applied for financial aid (with information regarding income, assets, and dependency status), where they were actually admitted to college and enrolled, their enrollment status (such as part time versus full time), year in school, and their living situation as a student.

CSAC has information regarding every Californian who has applied for financial aid and anyone outside of California who applied to a California school. However, CSAC does not have data on whether or where any Californian has applied, or been admitted, or decided to attend, except for students who are ultimately awarded a Cal Grant. CSAC does know which schools that a financial aid applicant listed on the FAFSA. For some data analysis purposes, CSAC can infer that a student’s intention is to attend the school listed first on the FAFSA. This approach is imprecise, though, since CSAC does not know whether the applicant applied, was admitted, or chose to attend that institution.

To get an impression of the effects of different Cal Grant criteria on student eligibility, we asked CSAC to separate FAFSA filers by first-time filers and others, and to allocate each to the segment that they had listed first on the FAFSA. Those data were separated into various categories of income, assets and EFC, as well as high school GPA or community college GPA, if relevant. Based on those data, we are able to get a sense of the effects of some of the current provisions limiting Cal Grant eligibility.

GPA cutoffs

The data indicate that impact of the GPA cutoffs is relatively small. The larger impacts may be for students whose GPA data fails to match with their FAFSA data.

- Out of 86,266 applicants income-eligible for a Cal Grant A and aiming to attend UC or CSU, only one had a GPA below 2.0, meaning they would not have been eligible for
either the Cal Grant B or A. The Cal Grant A’s 3.0 GPA requirement affected under 10 percent of the UC-intending students, and about two out of five CSU-intending students. At both UC and CSU, a large proportion of those students with GPAs between 2.0 and 3.0 were low income and likely qualified for Cal Grant B using the 2.0 GPA cutoff.

- At the community colleges, of the 66,504 applicants income-eligible for the Cal Grant B, less than 2 percent were ineligible due to the GPA requirement.
- Of the 16,883 income-eligible for a Cal Grant A and aiming to attend a nonprofit/WASC institution, a fourth were not eligible due to their GPA; most of those were poor and likely eligible for Cal Grant B.
- Of the 1,265 applicants income-eligible for a Cal Grant A and intending to enroll at other for-profit institutions, three-fourths had a GPA below 3.0. Most of those likely qualified for Cal Grant B. Of those income-eligible for Cal Grant B, 9 percent had an ineligible GPA.

In addition to the high school GPA requirement, there is a community college GPA requirement of 2.0 or 3.0 in order for applicants to qualify for the Transfer Entitlement Cal Grant B or A. The patterns by segment are similar to the high school grades. Perhaps more significant, though, are the large numbers of applicants who appeared to be eligible for a transfer entitlement award but for whom no match was identified between the FAFSA data that CSAC has and the GPA data provided by the community colleges.

Asset cutoffs

The Cal Grant uses a combination of income and asset cutoffs, depending on family size, to determine whether a student is eligible for a Cal Grant or not (with the figures varying depending on whether it is Cal Grant A or B, except independent students which have the same cutoffs). The federal EFC also considers income, assets, and family size, as well as other factors. But rather than discrete cutoffs, the EFC is an index that attempts to balance the various factors.

Data from CSAC indicate that among FAFSA filers who are income-eligible for the Cal Grant or Middle Class Scholarship, the asset cutoffs do not have a dramatic impact on eligibility for the Cal Grant or Middle Class Scholarship. (Some families may have been deterred from filing a FAFSA because of the cutoffs; those numbers are not known.)

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1 At CSU and UC, 85 and 84 percent, respectively, of those ineligible for the Cal Grant A based on their GPA had EFCs below $3,000.
2 78 percent had an EFC below $3,000.
3 81 percent had an EFC below $3,000.
4 It appears that a match is found only about half the time, though more analysis is needed to determine how meaningful the numbers are, since CSAC does not have enrollment records.
Aid applicants ineligible due to the asset cutoffs (recent high school graduates)

<table>
<thead>
<tr>
<th></th>
<th>Cal Grant A</th>
<th>Cal Grant B</th>
<th>MCS</th>
</tr>
</thead>
<tbody>
<tr>
<td>UC-intending</td>
<td>6%</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>CSU-intending</td>
<td>2%</td>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>CCC-intending</td>
<td>2%</td>
<td>1%</td>
<td></td>
</tr>
<tr>
<td>Nonprofit/WASC</td>
<td>6%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Other private</td>
<td>1%</td>
<td>0%</td>
<td></td>
</tr>
</tbody>
</table>

The data are similar for potential transfer entitlement students, except at UC where about 12 percent are ineligible due to the Cal Grant A asset ceilings.

Shifting to use of the EFC means that some students who were ineligible due to income or assets will become eligible for the Cal Grant, while some who would have been eligible will no longer be eligible. We did not have enough data or time to analyze the number of students who might fit each category.

Other eligibility restrictions

Based on the analysis of the effects of the asset and GPA cutoffs, it appears that the bulk of California residents who are enrolling in college and are needy but not receiving a Cal Grant are ineligible due to the restriction limiting the entitlement to recent high school graduates, age of transfers, and complications in matching GPAs (especially for transfer students). Determining the number of students now enrolling in college who would be eligible if these restrictions were relaxed requires student enrollment data that were not available to CSAC or to us.

Costs of the Step 1 recommendations

Without student-level data available, our subcontractor aggregated UC, CSU and national data to estimate institutional grants, Cal Grants, total grant aid, EFC and enrollment by dependency status and family income for each of the California public segments. Based on that analysis, they provided estimated costs of the Step 1 spread-and-stack proposal—broadening Cal Grant eligibility, and relying on the combination of the Cal Grant and institutional aid at UC and CSU to address need up to the affordability target.

For UC, the analysis suggested that the current combination of Cal Grants and institutional aid is sufficient to meet the affordability targets. This makes sense, since our proposal for Step 1 essentially adopts the current UC policy of providing the institutional aid necessary to bring students to a self-level of no more than $11,000, considering the parent contribution portion of the EFC along with Pell Grants and other grant aid. UCOP has affirmed this logic based on prior year figures (which would need to be adjusted given changing tuition and demographics).

The CSU analysis initially indicated a cost of about $19 million. This amount seemed low given that the CSU institutional aid policy is focused on tuition and not on cost of attendance, and does
not extend as high up the income scale as UC. A further analysis considered the possibility that the model might not be adequately considering student-level differences within the amounts that were averaged in income bands. Adjusting for this possibility yielded an estimate of $425 million. The average of these two estimates lands at $222 million, but leaves us with a large reliability range, not ready for policy decisions. With the time available, the CSU system office was not able to provide us with any opinion regarding the potential cost of the Step 1 policy.

The analysis of the community colleges yielded a figure of $1.5 billion, but was similarly based on inadequate data and is based off of a wide range. One complication that mostly affects the community college estimate is the treatment of students who are attending less than full time. The analysis we used combined all students into full-time equivalents. Under our proposal, however, students who are attending less than half time would not be eligible, and those attending half or three-quarters time would receive lower awards. The LAO-designed debt-free college proposal was similar in design to our proposal for the community colleges, and yielded a cost estimate of $2.2 billion. The difference might be partly a result of the LAO’s somewhat lower self-help expectation. But other figures are not matching up. For example, the LAO’s cost estimate limiting aid to just full-time students at the community colleges was only $500 million. Enrollment figures from CCCCO indicate that almost 60 percent of all FTE students are accounted for by full-time students. If providing grant aid for those students costs $500 million, then one might estimate the addition of the the half- and three-quarters time students as costing no more than an additional $350 million. We ran out of time to investigate the discrepancies further.

It is clear that the largest needs are at the community colleges. A previous analysis by the Institute for College Access and Success, based on data provided on applicants for competitive Cal Grants in 2014 that were denied due to shortages in funding, showed that over 309,000 students were apparently eligible and considered for Competitive awards (in other words, met income eligibility and GPA requirements but did not qualify for other reasons such as age). The state only funds about 26,000 competitive awards.

We were not able to estimate costs of the changes for the private institutions. As noted in the report, the state’s ability to influence and predict the actions of the segment is more limited, so there is greater hazard of strategic responses that could increase state costs. We advise the state to take more cautious step to prevent any unintended budgetary consequences of changes to institutional or student eligibility.

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6 CCCCO student counts by number of units taken for Fall 2017 show about 888,000 full-time equivalent students, with almost 500,000 attending full-time, 124,000 FTES of less-than-half-time students, and 349,000 FTES of students attending at least half time but less than full time.
7 https://tics.org/sites/default/files/pub_files/ticas_competitive_cal_grant_modeling_memo_0.pdf.
As is evident from the wide range of potential costs, using federal level data is a weak substitute for student-level data and yields highly imprecise estimates. CSAC or the Legislative Analyst’s Office should seek student-level data from the segments for purposes of developing more reliable estimates.

Finally, since the goal of financial aid is to encourage people to consider college and to enroll, or to enroll full-time instead of part-time, the broader availability of the Cal Grant could incent additional enrollment of low-income students, adding to Cal Grant costs and the need for more institutional aid. In the public segments, the size of any increase would be constrained by the fact that there is a limit to how much California resident enrollment can grow at the institutions with existing public funding, since net tuition is not enough to finance marginal costs.
APPENDIX 2

Communications Plan

Understanding the differences in the multiple state aid programs, their eligibility requirements and award levels, and how they all fit together is difficult even for experts in California student aid; there is little doubt that the programs’ complexity creates significant barriers to students applying for college and to enrolling. CSAC has already launched several important initiatives to try to minimize those challenges. Consolidating state aid programs should remove more of those barriers and, importantly, provide CSAC with an opportunity to breathe new life into a statewide, college-going culture. CSAC should use this moment to launch a sustained public communications initiative to ensure that all Californians understand their student aid options; revamp its online presence to provide usable personalized information to students and families; and use outreach interventions informed by research in behavioral economics. CSAC can begin scaling up its communications efforts immediately, even as the legislature considers program reforms.

RECOMMENDATION 1: Leverage the spotlight and launch a statewide marketing campaign to highlight CalGrant 2.0.

If California takes on Expanding Opportunity, Reducing Debt, CSAC and partners will have a unique moment in time to leverage the spotlight on student aid and college choices.

What We Know

Research shows that misperceptions about colleges costs are common, and that low-income students often have the least information. In 2011-12, 31 percent of independent students in the U.S. did not apply for federal aid. Among dependent students, 10 percent of those whose parental income was below $25,000 and 21 percent of those from families with incomes between $25,000 and $50,000 did not apply. Many low-income and first-generation students who would qualify for admission to selective institutions never even apply, and many potential college students are unaware of the availability of financial aid and believe that the published sticker price of tuition is what they will have to pay if they attend. As a result, they do not investigate their options. Surveys show that that students turn to parents, friends, and counselors or teachers as they make educational decisions. Yet friends and family may struggle to fully grasp the system, and guidance counselors at high schools serving low-income students generally have high caseloads and little time or training for college advising. Few states provide the resources

2 National Center for Education Statistics, National Postsecondary Student Aid Study 201, Power Stats, author calculations.
necessary to ensure that all families have the tools they need to make informed choices. Below we detail two models that provide lessons learned for CSAC to build on in crafting an ambitious communications plan.

**Model 1:** When Tennessee launched its statewide Tennessee Promise program, it used the moment to launch outreach to ensure that students filled out the FAFSA (also critical to ensuring that students could take advantage of the program). The Tennessee Higher Education Commission also used weekly data analysis to determine which localities had the lowest FAFSA completion rates and directed resources, such as workshops and one-on-one advising, to those locations in real-time. The campaign has been successful: Tennessee now has the highest FAFSA completion rate in the country.

![Covered California](image)

**Model 2:** The experience of Covered California, the state’s online health insurance marketplace, provides relevant lessons in communicating complicated decisions to low- and moderate-income residents. In 2013, California launched Covered California to provide a competitive marketplace where low- and moderate-income consumers can buy plans and receive large discounts; consumers cannot receive those discounts if they purchase plans off the marketplace, giving insurers a large incentive to participate. To make it a success, Covered California spent over

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$100 million per year to run paid ads, an earned media campaign, and community outreach efforts.\textsuperscript{7} They researched their target audiences to understand their motivations, demographics, and even the sectors where they are mostly likely to work.\textsuperscript{8} Doing so allowed them to tailor messages, digital platform usage, and in-person outreach. The results have rolled in. Covered California has 1.4 million enrollees each year making the complex decision to purchase insurance. Their overall take-up rate was higher than in states without these extensive marketing efforts, and they also brought in more of their “target” consumers.

**What CSAC Can Do**

We recommend that CSAC significantly scale its outreach and communications capacity and incorporate lessons learned from other models. Specifically, CSAC should:

- Use the California Cal Grant revamp moment and the Covered California blueprint to launch a large, research-driven annual communications campaign to improve FAFSA completion rates and send students to CSAC’s new website to learn about how they can afford college. This campaign should include marketing (large paid media buys), with a scaled social presence on a range of platforms to reach target communities, community outreach through a larger Cal-SOAP program, and earned media during key decision times of the year.
- Use real-time data to target resources throughout the year to non-high-income districts with low FAFSA completion rates or with the fewest localized resources.
- Calculate and use easy-to-understand affordability benchmarks that send a clear message to potential aid recipients. For example, if all families under a certain dollar figure should expect at least free tuition, use those clearly understandable benchmarks in marketing. The UC system already uses this benchmark through its Blue and Gold guarantee.
- Continue scaled-up outreach beyond the first year, tracking and evaluating the impact of outreach strategies, and using data to inform adjustments in future years. Fund annual outreach at scale by using a funding mechanism similar to that employed by the Covered California insurance marketplace: a fee for institutional participation. A per-Cal-Grant-recipient fee charged to all private colleges that receive Cal Grant dollars should, combined with state appropriations, provide enough to support the web portal and annual outreach.

**RECOMMENDATION 2: Provide students with personalized, early information through CSAC’s revamped online presence.**

Making data available to students is important, but in order to have a real impact, the data must be actively communicated and personalized enough to speak to individual circumstances.

**What We Know**


\textsuperscript{8} “Marketing, Outreach, and Enrollment Assistance Stakeholder Working Group,” http://hbex.coveredca.com/stakeholders/Marketing-Outreach-Enrollment/PDFs/Background_Reading.pdf.
Since 2011, Congress has required every college to post a net price calculator on its website, providing an estimate of how much students in different circumstances would be likely to pay for a year at that institution, after taking grant aid into consideration. In addition, the federal government has long had a College Navigator website with detailed information about the prices, enrollment, graduation rates, financial aid, and more, and it recently developed a site that added information about post-college earnings. But even detailed information on financial aid made available on websites may not be sufficient to support informed student choices. The individuals most in need of this information don’t know about it, don’t seek it out, and may need help understanding how that information applies to their specific circumstances. Low-income students are unlikely to be aware that, because of differences in financial aid, they may pay more at Cal State or even at a community college than at the University of California.

Experimental evidence confirms the importance of customizing information for individual students and of direct contact with and assistance from advisors. An experiment in which students and families received assistance with filling out financial aid applications at their local H&R Block offices when they went to get help on their tax returns provides a compelling example. Merely providing information on financial aid availability had no effect on application and enrollment outcomes; but when staff filled out the forms with potential students or their parents, there were large positive effects on applications to and enrollments in college. Among the findings, low-income high school graduates who received this service were eight percentage points more likely than others to enroll in college.

In another experiment, researchers focusing on high-achieving, low-income high school students developed a program to improve access to highly selective colleges. They provided students with a set of highly-ranked colleges for which they might qualify, as well as others that would be very likely to accept them. They also provided them with information on attainable financial aid, based on their family incomes, and a waiver of application fees. This low-cost intervention ($6 per student) dramatically changed application patterns, increasing the probability that students would enroll at an institution matching their qualifications by 46 percent. On average, students who received the mailing enrolled in colleges with graduation rates that were 15 percent higher, instructional spending that was 22 percent higher, and student-related spending that was 26 percent higher than similar students not receiving the information.

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14 Ibid.
15 Caroline Hoxby and Sarah Turner, “Expanding College Opportunities,” Education Next 13, no. 4 (Fall 2013). It is important to note that this strong response to personalized information delivered through the mail may be specific to the targeted group. These students represented a very small segment of the
Finally, the limited evidence around “early commitment” college access programs suggests that bolstering the information and commitments made to students earlier in the process can have a measurable impact on enrollment.16

*What CSAC Can Do*

The state should provide early information to children and families to familiarize them with the availability of financial aid and ensure the information is relevant to each families’ personal circumstances.

- CSAC should manage a process that would use information from state tax filings to send annual notices to parents of school children about the federal and state grant aid for which their children would be eligible if their current circumstances persist. This information will help parents and students to prepare for college both financially and academically. CSAC could also build partnerships with other state agencies administering means-tested programs where families with school children could receive notifications about federal and state grant aid.
- CSAC’s new online presence should provide quick gateways to easily accessible, personalized information and estimates about what level of aid students and families can expect (see *Expanding Opportunity, Reducing Debt* report).
- CSAC should require schools participating in the Cal Grant program to provide their net price calculators through the CSAC website and design functionality that makes it easy for students and families to make comparisons across institutions while on the site.
- CSAC should require schools participating in the Cal Grant program to provide their aid award letters only through the CSAC website and students should go to their personalized CSAC portals to accept any aid awards.17 This will send students directly to the CSAC website, and in the process expose them to a searchable, comparable format to help them make decisions.
- CSAC should ensure its personalized information is mobile friendly. While it may be less likely that students and families make major decisions while viewing information in a mobile format, mobile phones are more likely to be the primary source of Internet access for young people, low-income individuals, and nonwhites.18

**RECOMMENDATION 3: Use lessons from behavioral economics to guide all external communications and pilot targeted outreach programs.**

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17 Just as insurers can only sell discounted insurance plans on Covered California.
As CSAC considers revamping its web presence and communicating new eligibility requirements to the general public, we recommend the Commission leverage research-backed “nudge” strategies to support students through the financial aid and college choice process.

**What We Know**

There is strong evidence from behavioral economics and the cognitive sciences that it is not sufficient just to make information available and expect that the people who need it will have the awareness, time, and wherewithal to take advantage of it. Although having a wide array of choices can be a good thing, people frequently have difficulty making decisions that require comparisons involving many different criteria. Weighting the importance of graduation rates, geographical location, programs offered, size, price, and many other factors can be daunting. The bandwidth required to process college information creates particular strains for students from disadvantaged backgrounds who have to devote time and energy to addressing immediate survival issues.  

The evidence from behavioral sciences about the impact of reminders provided at critical times, of asking people to commit in advance to carrying out tasks at a specified time, and of simplifying and ordering the options people face is mounting. Low-cost, low-touch interventions can have a significant impact on both behaviors and attitudes. For example, a seminal study showed that switching a pension plan registration from requiring new employees to check a box if they wanted to join the plan to requiring them to actively opt out if they did not want to participate significantly increased participation.

Researchers and practitioners have begun to apply these principles to decision making in higher education. The idea of making the “default option” one that is mostly likely to lead to success is behind the creation of structured curriculum pathways in community colleges. Leaving students to choose without guidance among thousands of courses is less effective than designing a set of courses they will take unless they actively choose to make substitutions.

Additionally, several higher education studies have used “nudge” text messaging and shown results. In one experiment, researchers found that an automated, personalized text-messaging campaign to remind high school graduates of important summer tasks significantly increased the

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Attachment 1.1
number of disadvantaged students accepted to college who actually enrolled in the fall. In another, researchers sent a series of text messages to twelfth-graders in Texas and Delaware high schools who provided a mobile phone number reminding them to complete a FAFSA, with the option to access follow-up assistance. The estimated marginal cost was approximately $8 per student. In Delaware, FAFSA completion rates increased by five percentage points, and in Texas, students completed their FAFSAs earlier and were four percentage points more likely to matriculate.

What CSAC Can Do

It is becoming increasingly clear that changes in the way information and options are framed can have a significant impact on student choices, and that small and subtle pushes or “nudges” can measurably improve student outcomes. We recommend that:

- CSAC create texting campaigns that send reminders at critical times to ensure students apply for financial aid, designing the outreach in a way that allows the Commission to evaluate differences in outreach techniques over time and connect students to follow-up assistance as needed.
- CSAC work with the State Franchise Tax Board to recommend, at the appropriate time in the tax filing process, that families okay getting personalized information about financial aid, rather than making it a neutral option.
- CSAC’s website allows students to sort personalized information based on critical decision points. For example, if CSAC provides award notices in a standard template through their website, allow students to sort awards by factors students should consider, such as graduation rate, overall total net cost and aid gaps, and other decision factors. CSAC should order the default presentation of information by the level of importance of information, given the research on college choice and success, and limit the sortable options to those that are most important and useful to students and families.

Conclusion

The California Student Aid Commission has a unique opportunity to launch an ambitious and well-designed state communications campaign to increase informed access to college aid. CSAC can build on the progress made through program reforms to run a statewide marketing campaign, build a research-driven web presence and online functionality, and launch outreach programs that build on growing evidence from the field. CSAC should begin implementing these strategies immediately—most do not require the adoption of other reforms and can be prioritized based on potential impact and available resources.

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This report describes recent student financial aid reform efforts in different states and nations that might inform financial aid streamlining in California. After arranging state reforms into seven categories, the report evaluates the benefits and risks of each program to students, aid providers, and institutions. The report does not include research studies administered to samples of students that attempt to improve outcomes related to financial aid or other topics. One partial exception, described below, is a research study of text message reminders administered at a statewide level.

**Methods.** We performed an environmental scan of all 50 states and selected countries for relevant financial aid reform efforts. In selecting countries, we focused on those most similar to California, namely developed countries with a substantial private postsecondary sector characterized by the Organisation for Economic Co-operation and Development (OECD) as having relatively high tuition (which in this report also refers to mandatory fees) and moderate to significant financial aid. For example, among developed countries, compared with the United States, only Korea, Japan, and the United Kingdom have a higher percentage of postsecondary education funding provided by private funds (figure 1). Australia, Canada, and Chile have a lower proportion of private funding but were included for comparison purposes. We also examined the province of Ontario, Canada, which recently reformed its financial aid system.

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Figure 1. Public and private spending as a percentage of total spending on postsecondary education: 2014


We examined each reform to identify features that might be relevant for improving California’s financial aid system. We found that these efforts fall into seven categories: user-friendly websites, high credit hour minimums, zero tuition, regional cost-of-living adjustments, simplified loan repayment, increased funding, and tuition caps (not strictly a financial aid reform but included because of its close relationship to financial aid).

**User-friendly website.** It is safe to assume that in 2018, every financial aid agency across the country and around the world maintains a website. However, some websites are more helpful than others—those of the financial aid agencies of Ontario, Canada,³ and Oregon⁴ are noteworthy for their simplicity, thoroughness, and usability. These websites also allow users to easily create an accurate estimate of expected financial aid and total price of attendance before and after aid and direct them to apply for aid. The home page of the Ontario Student Assistance Program features a questionnaire that quickly estimates financial aid and net price of attendance after entering only seven elements of information: high school graduation year, marital status, number of children, approximate parental income, institution type, year expected to start postsecondary education, and whether the student will live at home with a parent (figure 2). In addition to these estimates, the website displays a link to apply for financial aid.

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³ See https://www.ontario.ca/page/osap-ontario-student-assistance-program.
⁴ See https://oregonstudentaid.gov.
The Ontario calculator has a list of incomes to choose from in wide bands (though each is represented by a single number), so users do not need to know the precise amount. To illustrate, figure 3 shows the initial financial aid and net price estimate that appears if users identify as a current high school senior (the default option) with a parental income around $50,000 (Canadian), planning to attend a university (as opposed to a college or private career college). This estimate appears after users enters only two pieces of information. The values adjust if and when users select other options, such as a different school year or living arrangement.

Figure 3. Ontario Student Assistance Program initial financial aid estimate (partial screenshot)


Figure 4 shows the results of a “precise estimate” for a dependent student with an income of $55,000 planning to attend McMaster University as a freshman in computer science. The functionality is similar to the net price calculators provided by most U.S. institutions as required by the Higher Education Opportunity Act of 2008 (P.L. 110-315, 122 Stat. 3078). In the Ontario case, however, the calculator is provided by a government agency that allows users to generate estimates for multiple institutions from the same website, whereas users in the United States must visit individual institutions’ websites or perhaps use a third-party service that aggregates estimates across multiple institutions.⁵

Figure 4. Ontario Student Assistance Program precise financial aid estimate (partial screenshot)


Many students and parents dramatically overestimate the price of postsecondary education.6 Showing them their estimated aid and net price and helping them apply for aid makes them more

likely to apply for aid and enroll in college. The primary risks to providing estimates of aid and net price are increasing the aid providers’ workload to handle additional aid and the incremental cost to update and maintain these elements of a website. There is also a tradeoff between simplicity and accuracy. It may be easier, for example, for users to enter income by selecting a range rather than entering a precise dollar amount and to disregard assets and other financial circumstances that determine aid amounts. However, students and their families who rely on estimates based on simplified criteria may end up with less aid than anticipated, leaving them with more unmet need than anticipated.

**High credit hour minimums.** Three U.S. states (Nevada, New York, and Rhode Island) require state financial aid recipients to enroll each term for at least 15 credit hours (hereafter, credits), which is higher than the 12-credit minimum used to determine full-time status for most federal student aid. The logic behind this reform is that students who successfully complete at least 15 credits will accumulate enough to complete a bachelor’s degree in 4 academic years (120 credits on a semester calendar) or an associate’s degree in 2 academic years (60 credits on a semester calendar). In contrast, students who complete only 12 credits per term would take 5 years to complete a bachelor’s degree and 2.5 years to complete an associate’s degree. (Some public institutions and systems, such as the University of Hawai‘i system and Indiana University-Purdue University Indianapolis, have promoted the 15-credit minimum without requiring it for financial aid eligibility.)

The advantage of the 15-credit minimum enrollment is that it puts aid recipients on a path to timely graduation if they complete these credits. But this policy also poses several risks to students and institutions. Some students cannot take 15 or more credits due to family or work obligations or because of a limiting disability. Required noncredit remedial courses might not count toward the 15-credit limit and, in any case, would not count toward a degree. The 15-credit minimum for state aid may be confusing to students and aid administrators who simultaneously have a 12-credit minimum for federal aid. Finally, students might attempt to skirt the rules by initially enrolling for 15 credits for financial aid purposes and intentionally dropping some courses later, which would undermine the purpose of the reform while possibly preventing other students from enrolling in the courses that get dropped.

**Zero tuition.** In recent years, four states and one country that had been charging tuition began waiving tuition for large populations of students, irrespective of financial need. Nevada, Oregon, Rhode Island, and Tennessee introduced zero tuition (or “free college”) policies for community colleges (public 2-year institutions). (California’s enactment last fall of Assembly Bill 19 set the stage for zero tuition for first-time, first-year community college students, though it has not yet taken effect.) New York state now offers near-zero tuition for public 4-year institutions for virtually all residents as well. A recent zero tuition reform in Chile, though not universal, applies to

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students in the lower half of the income distribution at many institutions. Similarly, the “Promise” programs in many U.S. cities offer grants intended to cover tuition to all residents of a particular city.

The major appeal of the universal zero tuition concept is the simplicity of its message to prospective students: if you attend college in this state, you will not pay tuition no matter what your financial circumstances are. Critics of these programs have pointed to several issues for students and states. One is that at many public institutions (including all California public institutions), tuition is significantly less than nontuition expenses (such as housing, food, and books). Zero tuition, in other words, falls far short of zero price of attendance. A second concern is that students may enroll in community colleges simply because they know that community college is tuition free. Some of these students would qualify for enough grant aid to cover tuition at a more selective 4-year institution, and in fact might have a lower total cost of attendance at a 4-year institution after figuring in nontuition expenses and institutional grant aid. Additionally, students who attend colleges that are less selective than their academic preparation would permit, known as undermatching, tend to have less positive outcomes during and after college. Another issue is that zero tuition programs have other conditions, like New York’s postgraduation residency requirements, that may pose hurdles for students before, during, or after enrollment. Such conditions would likely impose administrative costs on the institutions or financial aid agencies that must track down students who left the state to reclaim the awards and any applicable interest or penalties. Additionally, from the state perspective, waiving tuition for students with no need means fewer dollars for students with need.

Regional cost-of-living adjustments. Maryland adjusts its largest state grant program to account for regional differences in the cost of living, though we were not able to find documentation of how they measure these differences. A Maryland Higher Education Commission employee informed us that these adjustments are based on data from the College Board but was unable to provide any further details. This approach has significant potential for a state with wide regional variation in cost of living like California. It might measure cost of living using an existing source such as the U.S. Department of Defense’s Basic Allowance for Housing, which is updated annually and is already used by the U.S. Department of Veterans Affairs to calculate living expenses for recipients of the Post-9/11 GI Bill based on the location of the institution. For instance, in 2018, the maximum stipend in the California State University system ranges from $1,358 per month (or $12,222 over 9 months) at Humboldt State University to $4,247 per month (or $38,223 over 9 months) at San Francisco State University.

The main downside to cost-of-living adjustments is the added complexity to the process of budgeting for and awarding grants. Presumably this process would be straightforward at the campus level, and most of the burden would fall on state agencies such as the California Student

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Aid Commission and on postsecondary systems and chains, all of which serve students in multiple locations.

**Simplified loan repayment.** Over the last two decades, as college enrollment outpaced government appropriation, the United Kingdom has moved from a system of tuition-free postsecondary education to one that charges tuition at substantial levels (equivalent to over $11,000 per year on average). Along with this change, it has also instituted a student loan system that automatically enrolls borrowers in an income-contingent repayment system that adjusts monthly payments to a percentage of their earnings. In general, the automatic enrollment aspect of a policy like that in the United Kingdom reduces the administrative burden on both students and lenders. Payments are deducted from paychecks, so borrowers cannot forget to make them. Monthly payments are set by policy (currently pegged at 9% of income above a certain threshold) to be manageable for borrowers even if their income unexpectedly drops.

This reform has little relevance for California’s current financial aid system, which relies almost exclusively on grants. If California were to initiate a significant state-financed loan program, it would face significant administrative hurdles implementing automatic payroll deductions for payments, particularly for graduates who move out of state. Moreover, many students have more favorable terms from existing federal loan programs, including several options for income-contingent repayment options.

**Increased funding.** Chile, Korea, and the United Kingdom have significantly increased funding for their national financial aid programs. Other things equal, better funding benefits students by increasing amounts, increasing the number of recipients, or both. Beyond the cost of the aid itself, the main risk is that institutions will “capture” the increased funding by raising tuition accordingly, diminishing the efficacy of the grants to make college more accessible. There is considerable scholarly debate about whether and to what degree this occurs. One study comparing private for-profit institutions that do and do not accept federal Title IV student aid found that those that accept federal aid charge 78% more for tuition. A second risk is the marginal increase in the financial aid processing workload for institutions and aid providers.

**Text messaging.** We identified one statewide initiative, funded and implemented as a grant-funded research project rather than a state-sponsored policy, that is worth mentioning for achieving meaningful results at a low cost. In 2015, researchers sent a series of text messages to all 9,200 twelfth-graders in Delaware public high schools who provided a mobile phone number reminding them to complete a Free Application for Federal Student Aid (FAFSA). The estimated effect was a 5-percentage-point increase in FAFSA submission. An intervention like this one

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would increase applications for financial aid, and it would be expected to increase enrollment in postsecondary education and use of financial aid. The estimated marginal cost of the technology was approximately $8 per student reached and about $150 per student who enrolled in college (not including staffers’ time spent managing the text messages and responding to queries). The primary risk for this intervention is that it would increase demand for financial aid, which would mean an incrementally bigger budget and workload for the funding agency and institutions.

**Tuition caps.** Korea and the United Kingdom recently capped tuition to allow financial aid to cover a greater proportion of nontuition expenses.⁵⁶ (Australia, in contrast, removed tuition caps in 2016.)⁵⁷ Although setting tuition rates is not a financial aid reform per se, it affects financial aid policy in these countries by freeing up funding for students’ living expenses. Limiting tuition obviously makes postsecondary education more affordable, other things equal, but it carries several risks if it were to be considered in California. For one, as noted, setting tuition is a separate process from distributing financial aid with different rules and actors that vary by sector. While California’s state government has significant authority over tuition for the California Community College and California State University systems, it has no direct control over tuition at the University of California, though it does exert influence through the appropriations process. The state government has essentially no influence over what private institutions charge. To the extent that tuition revenue is used to provide financial aid, needy students might receive less institutional aid at lower tuition levels. There is also no guarantee that institutions can maintain the same quality of education or serve the same number of students when tuition increases are restricted.

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APPENDIX 4

Stakeholder Perspectives on CSAC Programs and the Grant Delivery System

To gather stakeholder input, we met with representatives of all of the state’s higher education segments, the K-12 sector, college access providers, college students, research and policy organizations, scholarship providers, and state and local government. Key themes emerged from those meetings, reflecting the project’s focus on opportunities to reduce complexity and increase affordability.

- **Student Eligibility**: Having multiple grants with complex and varying eligibility requirements, as well as inconsistencies in how required GPAs are calculated, lead to inequities in who qualifies and for what.
- **Aid Availability and Receipt**: Funding levels and program design, and/or institutional choices affect aid availability and receipt, from whether eligible students actually receive a grant, to when they get their aid, to their access to student loans when needed.
- **Application and Award Processes**: With multiple steps that too easily become obstacles, the combined federal and state financial aid process is difficult for students and parents to navigate, and it is administratively intensive and technologically inefficient for institutions.
- **Affordability**: California’s aid programs leave most low-income students struggling to cover the full cost of attendance, including at community colleges. Levels of student homelessness and food insecurity and low completion rates signal affordability challenges across the public systems, and college is harder to afford in regions with higher living costs.
- **Institutional Resources**: The funds available for financial aid administration and counseling, as well as for institutional aid, vary widely across segments and schools. Community colleges have by far the lowest resources per capita while serving the highest share of the state’s low-income students.
- **Communication and Outreach**: It is harder than it should be to explain available aid and how to get it, and to make sure that potentially eligible students get needed information and support. Complex aid programs and processes, limited resources, and lack of data all contribute to communications and outreach challenges for schools, college access providers, and CSAC.

Stakeholders welcomed the opportunity to share their observations about California’s financial aid programs, policies, and systems. Although they did not all have the same priorities or areas of expertise, they raised many of the same issues and examples. And they all expressed a belief that reform is both possible and necessary.
STAKEHOLDERS INTERVIEWED

In January and February 2018, project staff gathered stakeholder input through meetings with representatives from the following systems and organizations:

State higher education and K-12 segments:

- University of California (including a campus representative)
- California State University (including a campus representative)
- California Community College Chancellor’s Office
- the Association of Independent California Colleges and Universities (including two campus representatives)
- Fashion Institute of Design and Merchandising and MTI College (for-profit institutions)
- Riverside County Office of Education (representing K-12)

State agencies:

- California Department of Finance
- Legislative Analyst’s Office
- Staff of the California State Legislature
- California Franchise Tax Board
- Office of the Treasurer (Scholarshare savings program)

Other stakeholders

- California Community Colleges Student Financial Aid Administrators Association
- Student Senate for California Community Colleges
- California State Student Association
- California EDGE (Education, Diversity, and Growth in the Economy)
- John Burton Advocates for Youth (which serves foster and homeless youth)
- East Bay College Fund
- uAspire Bay Area (which serves low-income high school students)
- The Institute for College Access & Success
- The Education Trust – West
- Campaign for College Opportunity
- Office of the Mayor of Oakland,
- East Bay Consortium of Educational Institutions
**STAKEHOLDER PERSPECTIVES**

Here we summarize stakeholder concerns in eight themes: coverage, meeting need, complexity, timing, regional differences, federal/state alignment, efficiency, and differences between segments. For the most part, these views focus on aspects of California’s financial aid system, but they occasionally refer to related topics such as state funding for public institutions and policies regarding institution and federal aid.

Because stakeholders sometimes asked not to be quoted, no names or unique identifying details are used in this summary, and no comment is attributed to a group consisting of fewer than three participants.

**Coverage.** Stakeholders identified several important gaps in coverage for otherwise qualified students. Recent high school graduates must earn a high school grade point average of 3.0 or higher to qualify for Cal Grant A and 2.0 or higher to qualify for Cal Grant B. Stakeholders report that small discrepancies in which courses are used to calculate high school grade point averages sometimes affects which students are eligible for a Cal Grant. The income and asset ceilings present a problem to students and families who barely exceed the maximums but have trouble affording college without state grants, which leads some to request an adjustment to their stated finances.

A specific coverage gap is the “B to A doughnut hole” or “No Cal Grant Zone,” where students with income just above the cutoff for Cal Grant B and grades just below the cutoff for Cal Grant A cannot qualify for either award (though they may be eligible for a Middle Class Scholarship). Other students are excluded from eligibility because they are too old, they applied after the deadline, they applied too long after graduating from high school, or they used up their lifetime eligibility.

Students at about 20 community colleges face another coverage gap: their colleges do not participate in the federal student loan program, so they cannot take out Direct (Stafford) loans. However, the recently enacted California College Promise legislation (Assembly Bill 19), the main feature of which is to eliminate tuition and fees for all first-time, first-year community college students, requires participating colleges to offer federal loans starting in 2019.

**Meeting Need.** Even among state aid recipients, awards may not be sufficient to cover the price of attendance for needy students. While Cal Grants cover tuition and fees at public institutions, higher awards could cover a larger portion of students’ non-tuition expenses, which for most students at public institutions exceeds tuition and fees. Stakeholders mentioned that the four-year Cal Grant eligibility limit is insufficient when many students take more than four years to earn a bachelor’s degree. A representative of an institution that offers numerous shorter programs supported by Cal Grant C remarked that many graduates would like return for a bachelor’s degree program but have exhausted their Cal Grant eligibility.

Some gaps in need are built in by design, particularly the feature of Cal Grant B that it does not cover non-tuition expenses in the first year. Other gaps seem to be unintended consequences of other circumstances. For instance, financial aid administrators may be reluctant to reclassify dependent students as independent, which in many cases would entitle the students to larger aid...
awards. The reasons they cited were concern of being audited and found to be improperly awarding aid as well as because insufficient resources to process the required paperwork.

Complexity. A common complaint was that the state grant process was needlessly complicated and difficult for students to understand. It was widely acknowledged that existing systems were antiquated, requiring students to take many steps that a financial aid office could do more efficiently using information it already has, such as completing the G-6 Transfer Entitlement Certification Form for Transfer Entitlement Cal Grants.

Some application steps seemed out of order, requiring needless effort such as requiring students to submit grades before confirming that they met the income eligibility requirements. Others were confusing to students. Many students do not realize they need to establish a WebGrants account with CSAC to receive state grants, and even among those who do, they often do not understand why. Nor does it help matters that notices of Cal Grant awards are mailed to students without notifying the institutions they are planning to attend. When students do not realize they must create WebGrants accounts or are unable to do so on their own, their respective institutions may not even be aware that they need help.

Similarly, students attending institutions that put other aid on a payment card sometimes were not aware that they had received a Cal grant not on the card. One community college financial aid office reportedly required applicants to present a driver’s license for identification, which many low-income students did not possess.

Even experienced financial aid professionals could not explain the rationale for arcane provisions of state financial aid policy like the two percent of Cal Grant B recipients at 4-year institutions whose grants cover tuition and fees in the first year. One organization attempted to diagram the various state aid programs but gave up when the flowchart became too complex. A financial aid administrator summed up the general sense of frustration in a rhetorical question: “If we can barely understand these aid programs, how can we explain them to students and parents?”

Timing. For many students, application due dates and disbursement dates are poorly synchronized with students’ needs. High school graduates who decide to enroll in community colleges during the summer have already missed the March 2 application deadline. Community college students can apply for the alternate aid cycle by the September 2 deadline, but many students are unaware of this possibility. Moreover, due to resource constraints, community colleges do little to promote this opportunity, and there are fewer awards available during this period.

Moreover, even when they are awarded, state grants often arrive too late to be useful. Even then, some institutions hold grant disbursements until the start of the term to avoid making payments to students who never enroll, which means that recipients have trouble paying for critical expenses like rent and food before they receive aid. (One participant proposed a safe harbor policy by which institutions could disburse small fractions of grants before the start of the term without being held liable for no-show students.) Late payment is particularly a problem for the Chafee Grant program for foster youth, where payments can be delayed as long as four months.

Institution representatives discussed other issues with the timing of state grants. In particular, the recent change to using prior-prior year income for the Free Application for Federal Student Aid
(FAFSA) and the option for students to submit FAFSAs as early as October of the year before enrollment puts pressure on institutions to make award letters earlier. At the same time, financial aid offices can only estimate the value of Cal Grants before the legislature’s June 15 constitutional deadline to pass the state budget. The timing of the state budget cycle also effectively precludes institutions with active summer enrollment from offering Cal Grants for summer terms because instruction begins before the budget is enacted.

**Regional differences.** While tuition and fees are relatively uniform across public campuses across the state, stakeholders acknowledged that living expenses are not. By way of illustration, the Department of Veterans Affairs sets the value of housing stipends for Post-9/11 GI Bill recipients according to regional cost of living where the institutions are located. In 2018, the maximum stipend in the CSU system ranges from $1,358 per month (or $12,222 over 9 months) at Humboldt State University to $4,247 per month (or $38,223 over 9 months) at San Francisco State University—a greater than threefold difference.¹

**Federal/state alignment.** Stakeholders noted inconsistencies between state and federal aid programs. Some differences work to the benefit of broader or more comprehensive financial support for California undergraduates, such as opening up eligibility for most aid programs under 2011 Assembly Bill 130 (the California Dream Act) and the establishment of the DREAM loan program. In other areas, California’s state grants are less generous than their federal counterparts. As described above (“Coverage”), Pell recipients may fail to receive Cal Grants because they missed the state’s application deadline, they had income and assets just above the sharp eligibility threshold, they were too old, they graduated high school too long ago, their high school grades were too low, or they exhausted the period of eligibility for Cal Grants.

A separate area of concern is a state requirement that Cal Grant-awarding institutions offer at least two out of three federal campus-based programs. With the recent termination of the federal Perkins loan program and little prospect of its resurrection, that means institutions must offer both federal work-study and federal Supplemental Educational Opportunity Grants.

**Efficiency.** The biggest complaint from institution representatives is the inefficiency of administering the state aid programs, particularly the onerous paperwork and processing demands. This assessment was shared across the postsecondary segments. Stakeholders pointed to outdated and inefficient technology for institutions to communicate with CSAC and many manual processes that could be automated. Certain components of the application, such as income verification and participation in assistance programs like CalFresh (food stamps), could be performed by state agencies (other than CSAC) without requiring any intervention by students or institutions. Participants lauded CSAC for recent conversions of many paper forms to electronic submissions, but they complained that some processes still cannot be completed electronically, including electronic payment of certain grants. One representative singled out midyear transfer as the “biggest headache” of all.

Community colleges in particular have little incentive to encourage students to apply for and receive state aid because it is burdensome to administer and does little to support financial aid operations. Nearly all needy students already have their tuition waived by California College

Promise Grants (formerly known as Board of Governors Fee Waivers), so state aid tends to go toward books, living expenses, and other non-tuition expenses that do not directly benefit the colleges. At the same time, community college financial aid offices have very limited funds to administer aid programs (see “Differences between segments”). One participant contended that from the community colleges’ perspective, the Cal Grant program “could almost not exist.”

**Differences between segments.** Stakeholders also noted differences between California’s postsecondary segments in terms of institution resources, though some of these disparities are unlikely to be addressed by changes to financial aid policy. Within the private nonprofit segment, institution representatives reported that the institutions with the most financial resources can afford to meet the full need of all students with institution grants. These institutions also tend to be the ones with the most highly selective admissions, and some maintain a need-blind policy of admitting students regardless of financial need. At the same time, they acknowledged that most private nonprofit institutions are not in such a fortunate position and that many cannot meet students’ full need with grants.

Representatives of private nonprofit institutions also stressed the philosophy of state aid programs treating public and private institutions equally, perhaps even establishing a single grant amount regardless of institution segment. They argued that students should be able to choose institutions based on what fits their needs and preferences rather than by the amount of aid the institutions are able to offer them.

Participants also pointed to differences among California’s three public segments, too. California’s community colleges have far fewer dollars per student to administer financial aid programs than other public institutions, spending only $40 per student, compared with $165 per student at UC and $77 per student at CSU. Community college staff contended that even with the economy of scale of serving a large student population, this level of funding is inadequate for the demand. Staff feel they lack the resources to even inform students about important financial aid opportunities such as the alternate September aid cycle for those who missed the March 2 deadline (see “Timing”) and the recently established Full-Time Student Success Grants. Nor do community college financial aid offices have the resources to adequately assist students with their applications. For students who do receive aid, financial aid offices sometimes cannot deliver it on time. One representative referred to research describing how many needy community college students missed out on Pell grants due to problems with the federal aid application and verification process that might have been avoided had the colleges been able to provide more one-on-one assistance to students. Another pointed to research showing that after accounting for federal, state, and institution aid, community colleges are more expensive to attend, on average, than UC or CSU institutions.

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The Grant Delivery System

Much of the input we heard from colleges and counselors was related in one way or another to CSAC’s technology. In several different meetings school officials emphasized the frustration of having to get into the CSAC WebGrants system and then having to enter data “manually” rather than through more efficient data uploads. One segment estimated that at least one full-time staff person at every college was dedicated solely to dealing with CSAC administrative issues.

Students, also, struggle with the technology. Of the more than 30,000 phone calls that CSAC received between November 1, 2017, and the end of February, 40 percent were about password reset and problems getting into the WebGrants system (see attached data from CSAC), which we understand does not work reliably with some common web browsers.

From our meetings with CSAC staff, our understanding is that the process has already begun to update CSAC’s technology. That update that is sorely needed. A data system that allows for changes to be made more easily, and for data to be checked for accuracy in real time, will certainly reduce the need for manual entry by either CSAC or school officials. Incorporating the possible consolidation or simplification of programs into the modernization plan could facilitate both efforts.

With newer technology coming, now is the the perfect time to examine each task and process to determine whether there is a way to eliminate the need for the process (rather than just replicating current processes into a new system). The best system would build off of the FAFSA and not require students to create separate accounts with CSAC at all, except for in situations such as Dreamers. Only after exploring whether there are ways to eliminate processes should CSAC attempt to implement current processes using the new technology.

Further, in building and budgeting for the updated system, consider the programming needs of the schools and colleges that interact with CSAC. Include the lead time and resources to provide colleges with updates to their own data management software, so they can interact efficiently with CSAC.
Call Center Statistics from October 1, 2017 through February 28, 2018

The Call Center received 30,062 calls from November 1, 2017 through February 28, 2018. Our Shortel reports break the calls down by the 11 queues listed below. The most popular queues are Password Reset and Cal Grants—English accounting for approximately 80 percent of our calls. Shortel does not provide information on the types of calls received under each queue.

Our staff report weekly on the top types of calls they are receiving. Based on those reports, here are the top reasons students and parents call when they select the option for the top two queues.

Reasons for Cal Grant English calls:
- Reasons for Disqualification
- Claiming Cal Grant award
- How to remove hold from account

Reasons for Tech Help Desk calls:
- Password Reset (students forgot password, browser issues, inactive accounts)
- Cannot access WebGrants for Students (incompatible browser)

| November 1, 2017 - February 28, 2018 |
|---|---|---|
| Queue               | Calls | % of Total |
| Password Reset      | 11,819 | 39.3% |
| Cal Grants English  | 12,563 | 41.8% |
| Cal Grants Spanish  | 243   | 0.8%  |
| Dream Act English   | 2,251 | 7.5%  |
| Dream Act Spanish   | 189   | 0.6%  |
| Chafee Spanish      | 1     | 0.0%  |
| Chafee English      | 1,344 | 4.5%  |
| APLE English        | 506   | 1.7%  |
| APLE Spanish        | 5     | 0.0%  |
| MCS English         | 1,127 | 3.7%  |
| MCS Spanish         | 14    | 0.0%  |
| **Total Calls**     | **30,062** | **100.0%** |

CSAC started using the language line in December 2017. These are the latest stats from February 2018. We used the Language Line service to respond to 76 calls:
- 1.3% Arabic (1 call)
- 1.3% Vietnamese (1 call)
- 97.4% Spanish (74 calls)
# APPENDIX 5

## Analysis of Administrative Steps

### CSAC CAL GRANT AND COLLEGE FINANCIAL AID PROCESS

<table>
<thead>
<tr>
<th>WHO</th>
<th>WHAT</th>
<th>HOW</th>
<th>WHEN</th>
</tr>
</thead>
</table>
| Student   | Files FAFSA and submits to Central Processing System (CPS). Requires FSA ID or paper signature. | Online or by paper to CPS | ● Oct 1 to Mar 2.  
● Oct 1 to Sep 2 for C2 Competitive.  
● No deadline and no GPA for Renewal.  
● CADA is available after Jan 1. |
| AB 540 student | AB 540 students complete the California Dream Act Application (CADA) and submits to CSAC. | Online to WebGrants or paper to CSAC |
| CPS       | Sends Student Aid Report (SAR) to student. Lists FAFSA data, EFC, Verification selection, Pell Grant and Loan eligibility, and if EFC not calculated due to missing data. | Email or paper | ● 1-3 days if online.  
● 3-5 days if by paper and has email.  
● 3 weeks if by paper and no email. |
| CPS       | Sends Institutional Student Information Record (ISIR) to colleges. *(See College Process).* | Electronic file | 1-3 days after FAFSA submitted |

### CSAC PROCESS

<table>
<thead>
<tr>
<th>WHO</th>
<th>WHAT</th>
<th>HOW</th>
<th>WHEN</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPS</td>
<td>Sends ISIR to CSAC if CA address or CA college listed.</td>
<td>Electronic file</td>
<td>1-3 days after FAFSA submitted</td>
</tr>
<tr>
<td>CSAC</td>
<td>Loads ISIR data into Grant Delivery System (GDS).</td>
<td>GDS</td>
<td>Oct; daily</td>
</tr>
<tr>
<td>CSAC</td>
<td>Loads CADA data into GDS; runs CADA process to calculate EFC; selects students for verification.</td>
<td>Keyed in WebGrants or online</td>
<td>Jan; daily</td>
</tr>
<tr>
<td>CSAC</td>
<td>For CADA, sends California ISIR (CA ISIR) to colleges.</td>
<td>WebGrants</td>
<td>1-3 days after CADA submitted; daily</td>
</tr>
<tr>
<td>High School</td>
<td>Sends GPA data to CSAC for graduating seniors. Encouraged to include seniors graduated one year out.</td>
<td>Keyed in WebGrants or electronic file or paper</td>
<td>Begins May of junior year until Mar 2</td>
</tr>
<tr>
<td>CSAC</td>
<td>Sends GPA Accepted/Rejected Report to HS.</td>
<td>WebGrants</td>
<td>After GPA reported</td>
</tr>
<tr>
<td>High School</td>
<td>Works GPA Rejected Report, makes corrections and resubmits to CSAC.</td>
<td>Keyed in WebGrants or electronic file or paper</td>
<td>After GPA Accept/Reject Report</td>
</tr>
<tr>
<td>College</td>
<td>Can send GPA Verification data to CSAC for their students. 3 GPA Types: Reestablished, Community College, College</td>
<td>Keyed in WebGrants or electronic file or paper</td>
<td>Prior to Mar 2; CC has second cycle prior to Sep 2.</td>
</tr>
<tr>
<td>College</td>
<td>Updates College Cost Estimate on WebGrants.</td>
<td>Keyed in WebGrants or electronic file, GDS</td>
<td>Oct, prior to CSAC Awarding process</td>
</tr>
<tr>
<td>---------</td>
<td>------------------------------------------</td>
<td>---------------------------------------------</td>
<td>----------------------------------</td>
</tr>
<tr>
<td>CSAC</td>
<td>Matches ISIR and CA ISIR with GPA by using demographics since GPA does not have SSN.</td>
<td>Keyed in WebGrants</td>
<td>Oct; daily</td>
</tr>
<tr>
<td>CSAC</td>
<td>After ISIR (and CA ISIR) and GPA matched, creates FA record on GDS and begins Cal Grant Awarding process. Middle Class Scholarship (MCS), Cal Grant C, and Renewal Grants do not require GPA.</td>
<td>GDS</td>
<td>Oct to Mar; Oct to Sep for C2 Competitive; ongoing process until Dec of following year</td>
</tr>
</tbody>
</table>
| CSAC    | **CSAC Cal Grant Awards:**  
E1 = High School Entitlement Mar 2  
E2 = Community College Transfer Entitlement Mar 2  
C1 = Competitive Mar 2  
C = Cal Grant C Mar 2  
C2 = Competitive Sept 2  
MCS = Middle Class Scholarship Mar 2  
*Note: MCS is a Specialized Program* | GDS                                         | Oct 1; daily |
| CSAC    | Application period opens, run E1 Entitlement award cycle | GDS, WebGrants                             | Oct 1; daily |
| CSAC    | Reviews for New Cal Grant eligibility from ISIR and GPA including:  
• US Citizen/eligible noncitizen  
• Selective Service  
• Not in default on Title IV loan or owe refund  
• CA resident  
• No prior bachelor’s degree  
• Enrolled in an eligible program  
• Income and asset ceilings  
• Financial need  
• GPA | GDS                                         | Oct 1; daily |
| CSAC    | Reviews CADA Cal Grant eligibility similar to regular process using CADA data and CA ISIR. | GDS                                         | Jan 1 after CADA is processed; daily |
| CSAC    | Sends California Aid Report (CAR) to student, sends E1 preliminary Cal Grant notice if awarded, includes eligibility for Pell Grant. | Email                                      | Oct; 1-3 days after E1 cycle; daily |
| CSAC    | Notifies college of Cal Grant Award on Cal Grant Roster. Once awarded, no longer evaluates subsequent ISIRs for any changes to FAFSA. | WebGrants                                  | Cal Grant Roster:  
Jan for E1  
Apr for E2  
Apr for MCS?  
May for C  
Jun for C1  
Jul for Renewals  
Oct for C2 |
<p>| CSAC    | Notifies student they must select college. | Email                                      | Feb |</p>
<table>
<thead>
<tr>
<th>Student</th>
<th>Reports changes through WebGrants or paper forms.</th>
<th>WebGrants or paper</th>
<th>Feb; daily</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSAC</td>
<td>Processes changes from college as a result of the college financial aid and verification process from Grant Change Roster or paper.</td>
<td>GDS; Keyed in WebGrants or electronic file</td>
<td>Feb; daily</td>
</tr>
<tr>
<td>CSAC</td>
<td>Notifies colleges and students of changes to Cal Grant Award from college financial aid process.</td>
<td>WebGrants</td>
<td>Feb; daily</td>
</tr>
<tr>
<td>CSAC</td>
<td>Mar 2 Application closes; Run E2 Transfer Entitlement cycle.</td>
<td>GDS</td>
<td>Mar 2</td>
</tr>
</tbody>
</table>
| CSAC    | Reviews for E2 Transfer Entitlement eligibility from ISIR including:  
  - US Citizen/eligible noncitizen  
  - Selective Service  
  - Not in default on Title IV loan or owe refund  
  - CA resident  
  - No prior bachelor’s degree  
  - Enrolled in an eligible program  
  - Income and asset ceilings  
  - Financial need  
  - GPA | GDS | Mar |
| CSAC    | Sends G-6 Transfer Entitlement Forms to E2 students. | Mail paper | Mar |
| CSAC    | Mar 2 MCS Application closes; Run MCS award process. Reviews MCS students for eligibility, including:  
  - Attending CSU or UC  
  - Income and asset ceilings | GDS | Mar |
| CSAC    | Sends MCS award notices to students and college. | WebGrants | Mar |
| Student | Returns G-6 Transfer Entitlement Form to CSAC. | Mail paper | Apr, daily |
| CSAC    | Keys G-6 Transfer Entitlement forms to review and makes E2 awards:  
  - Graduated from CA High School after June 30, 2000 and were CA resident when they graduated from HS  
  - Transferring from CC to 4-year university with no break in attendance | GDS | Apr, daily |
| CSAC    | Sends E2 Transfer Entitlement Award notices to students and college | WebGrants | Apr |
| CSAC    | Run C1 Competitive Scoring Matrix. Run C1 award cycle. Reviews for C1 eligibility from ISIR and GPA including:  
  - US Citizen/eligible noncitizen | GDS | May |
<table>
<thead>
<tr>
<th>CSAC</th>
<th>Sends C1 Competitive Award notices to students and colleges.</th>
<th>WebGrants</th>
<th>May</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSAC</td>
<td>Cal Grant C cycle begins, notifies students of possible eligibility, sends student Cal Grant C Supplement Form.</td>
<td>Mail paper</td>
<td>May</td>
</tr>
<tr>
<td>Student</td>
<td>Returns Cal Grant C Supplement Form to CSAC.</td>
<td>Mail paper</td>
<td>May</td>
</tr>
<tr>
<td>CSAC</td>
<td>Keys Cal Grant C Supplement and makes awards.</td>
<td>GDS</td>
<td>May</td>
</tr>
<tr>
<td>CSAC</td>
<td>Sends Cal Grant C notices to students and college.</td>
<td>WebGrants</td>
<td>May</td>
</tr>
<tr>
<td>CSAC</td>
<td>Notifies student to confirm HS graduation</td>
<td>Email</td>
<td>May</td>
</tr>
<tr>
<td>Student</td>
<td>Confirms High School graduation.</td>
<td>WebGrants for Students</td>
<td>Jun</td>
</tr>
<tr>
<td>High School</td>
<td>Confirms High School graduation.</td>
<td>Keyed in WebGrants or electronic file</td>
<td>Jun</td>
</tr>
<tr>
<td>CSAC</td>
<td>Confirms HS graduation if not reported with CA Department of Education (CDE).</td>
<td>With CDE</td>
<td>Jun</td>
</tr>
<tr>
<td>CSAC</td>
<td>Keys Cal C Supplement, runs cycle, notifies students and colleges of Cal Grant C Award.</td>
<td>GDS, WebGrants</td>
<td>Jun</td>
</tr>
<tr>
<td>Student</td>
<td>Sends form to CSAC if awarded Cal Grant and transferring to eligible Cal Grant college.</td>
<td>Paper form</td>
<td>Jun</td>
</tr>
<tr>
<td>CSAC</td>
<td>Renewal Cal Grant cycle begins. Reviews for Renewal eligibility including:</td>
<td>GDS</td>
<td>Jul; weekly</td>
</tr>
<tr>
<td></td>
<td>● CA resident</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Have at least 10% remaining eligibility</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Have valid transaction for each term of the prior year</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CSAC</td>
<td>Send Renewal Cal Grant notices to students and colleges.</td>
<td>WebGrants</td>
<td>Jul; weekly</td>
</tr>
<tr>
<td>CSAC</td>
<td>Send Fall Advance to college, 95% of prior Fall reconciliation.</td>
<td>EFT or paper check</td>
<td>Aug</td>
</tr>
<tr>
<td>CSAC</td>
<td>Process Cal Grant Roster data from college.</td>
<td>GDS</td>
<td>After data is submitted; daily</td>
</tr>
<tr>
<td>CSAC</td>
<td>Process Payment Codes from college. Once payment and adjustment codes are accepted, Payment Status code will reflect AP (Accepted Payment) or AA (Accepted Adjustment).</td>
<td>GDS</td>
<td>After data is submitted; daily</td>
</tr>
<tr>
<td>CSAC</td>
<td>Process Payment Cycle. Over weekend, AP and AA will change to RP (Reconciled Payment) or RA (Reconciled Adjustment).</td>
<td>GDS</td>
<td>Weekend process</td>
</tr>
<tr>
<td>CSAC</td>
<td>Send Monthly Payment Activity Report to College.</td>
<td>GDS, WebGrants</td>
<td>Aug and monthly process</td>
</tr>
<tr>
<td>CSAC</td>
<td>If supplemental funds needed, send Supplemental Payment to college.</td>
<td>EFT or paper check</td>
<td>Aug, after payment cycle, weekly</td>
</tr>
<tr>
<td>CSAC</td>
<td>C2 Competitive CC application closes.</td>
<td>GDS</td>
<td>Sep 2</td>
</tr>
<tr>
<td>CSAC</td>
<td>Receives enrollment file and GPA file from Community College.</td>
<td>Electronic, GDS</td>
<td>Sep</td>
</tr>
<tr>
<td>CSAC</td>
<td>C2 Competitive award cycle run. Send C2 award notice to students and Community College.</td>
<td>GDS, WebGrants</td>
<td>Oct</td>
</tr>
<tr>
<td>CSAC</td>
<td>Notifies colleges of year end and deadline to report payments for prior award year.</td>
<td>Email by memos</td>
<td>Sep</td>
</tr>
<tr>
<td>CSAC</td>
<td>New award year application period opens; first E1 awards made; first E1 notices sent; E1 runs weekly until next year December.</td>
<td>GDS, WebGrants</td>
<td>Oct 1; daily</td>
</tr>
<tr>
<td>CSAC</td>
<td>Notifies colleges payment deadline, review year end reconciliation for prior award year.</td>
<td>Email by memos</td>
<td>Oct</td>
</tr>
<tr>
<td>CSAC</td>
<td>Notifies students when Cal Grant A Reserve is coming to end.</td>
<td>Email</td>
<td>Nov</td>
</tr>
<tr>
<td>CSAC</td>
<td>GPA collection begins for new award year.</td>
<td>GDS</td>
<td>Nov</td>
</tr>
<tr>
<td>CSAC</td>
<td>End of year closeout for prior year, notifies colleges of final invoice if schools pay more than was accepted through reconciliation; conclude Entitlement and Renewal cycle.</td>
<td>GDS, Paper with invoice</td>
<td>Dec</td>
</tr>
<tr>
<td>CSAC</td>
<td>Sends invoices to colleges, with payments due by January.</td>
<td>Paper invoice</td>
<td>Jan</td>
</tr>
<tr>
<td>CSAC</td>
<td>Final closeout activities.</td>
<td>GDS</td>
<td>Feb</td>
</tr>
</tbody>
</table>

| COLLEGE PROCESS |
|-----------------|-----------------|-----------------|
| **WHO**         | **WHAT**        | **HOW**         | **WHEN**        |
| College         | Loads ISIR and CA ISIR data into their computer system. *Note: Colleges do not have a uniform timeframe due to FAM software updates and institutional policies.* | Electronic file to college Financial Aid Management (FAM) system | Jan 1, after FAM system is updated; daily |
| College         | Sends student information regarding FAFSA and CADA receipt and next steps. | Email | After FAM updated; daily |
| College | Reviews for new Cal Grant Eligibility requirements in addition to other federal requirements:  
- CA Resident or AB 540 eligible  
- US Citizen or eligible non-citizen or AB 540 eligible  
- Selective Service for males  
- Not have earned a bachelor’s degree  
- Not be in grant repayment or in default on a student loan  
- Not be incarcerated  
- Enrolled at least half-time  
- Maintain Satisfactory Academic Progress (SAP)  
- Has financial need  
- Meets Income and Asset requirements  
- If Transfer Entitlement Award, meets all requirements  
  - Graduated from CA High School after June 30, 2000 and were CA resident when they graduated from HS  
  - Transferring from CCC to 4-year university with no break in attendance | College FAM and WebGrants | After FAM updated, and CA ISIR received, and Cal Grant Roster available; daily  
Cal Grant Rosters:  
Jan for E1  
Apr for E2  
Apr for MCS?  
May for C  
Jun for C1  
Jul for Renewals  
Oct for C2 |
|---|---|---|
| College | Reviews CADA Cal Grant students for eligibility requirements and those selected for Verification including:  
- IRS Tax Transcripts  
- Proof of income if IRS Tax return not filed  
- Enrollment in eligible course of study  
- Enrollment status | College FAM and WebGrants | Jan 1, after FAM updated, CA ISIR received, and Cal Grant Roster available; daily |
| UC and CSU | Reviews MCS students for eligibility, including:  
- Income and assets below ceilings  
- Are receiving less than 40% of their mandatory statewide fees in federal or institutional aid | WebGrants and FAM | Apr?, after FAM updated, CA ISIR received, and Cal Grant Roster available; daily |
| College | Reviews Cal Grant C Roster for eligibility including:  
- Enrolled in vocational, occupational, or technical program | WebGrants and FAM | May, after FAM updated, and CA ISIR received, and Cal Grant Roster available; daily |
<p>| College | Notifies students what documents and other requirements are needed for federal and state aid. | Email | Mar, after FAM updated; daily |
| College | Submits college’s request for documents and other requirements. | College FAM, Email, mail, in person, and/or faxes. | Mar, after FAM updated; daily |
| College | Reviews documents and other requirements from student for acceptability. | College FAM | Mar, after FAM updated; daily |
| College | Sends FAFSA corrections to CPS. (Same process as FAFSA; CPS will send student SAR and college ISIR). | College FAM, electronic file to CPS | Mar, after FAM updated; daily |
| College | Loads correction ISIR, review results for accuracy, request documents to resolve conflicting data. Reiterate process until no changes are required. | College FAM | Mar, after FAM updated, after correction ISIR received; daily |
| College | Report corrections to CSAC on Grant Record Change Screen or paper (G-21 Form). | Keyed in WebGrants or paper | Apr, after ISIR corrections and Cal Grant Roster is received; daily |
| College | Report Education Level (EL) to CSAC. EL 1 = 1 – 29 units EL 2 = 30 – 59 units EL 3 = 60 – 89 units EL 4 = 90 – 120 units | Keyed inn WebGrants or electronic file | Apr, after ISIR and Cal Grant Roster is received; daily |
| College | Reviews financial aid award and COA components including living and enrollment status, EFC and Financial Need. | College FAM | Apr, after FAM updated; daily |
| College | Reviews and updates Funds Management for awards, coordinates funds with institutional, federal, and state sources with Business Office. | College FAM, federal and state systems (COD, G-5, WebGrants) | Apr, after FAM updated; daily |
| College | Packages aid according to institutional, federal and state policies. Some colleges can send preliminary award letters prior to verification completion. | College FAM | Apr, after FAM updated; daily |
| College | Notifies students of awards with preliminary or official Award Letter. | Email or college portal | Apr, after FAM updated; daily. Some colleges can send early award letters. |
| College | Adjusts award packages new awards or eligibility changes and notifies student. Cannot receive more than 1 award restricted to tuition and fees. | Email or college portal | Apr, after FAM updated; daily |
| College | Reviews for Renewal Cal Grant Eligibility in addition to other federal requirements ● CA resident: ● Attend at least half-time ● Meet SAP | College FAM and WebGrants | Jul, after FAM updated, ISIR and CA ISIR received, and Cal Grant Roster available; daily |</p>
<table>
<thead>
<tr>
<th>Role</th>
<th>Task</th>
<th>Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>College</td>
<td>Transmits data to Common Origination and Disbursement (COD) system for federal Pell Grant and Student Loan funding.</td>
<td>Summer; daily</td>
</tr>
<tr>
<td>COD and G-5</td>
<td>Processes COD data and updates COD and makes funds available through G-5 federal payment system.</td>
<td>1-2 days; daily</td>
</tr>
<tr>
<td>College</td>
<td>Financial Aid and Business Office review COD and G-5 system for federal funding.</td>
<td>Prior to Fall term; daily</td>
</tr>
<tr>
<td>College</td>
<td>Perform monthly reconciliation for federal aid programs.</td>
<td>Aug; monthly</td>
</tr>
<tr>
<td>College</td>
<td>Receives Cal Grant Fall Advance, 95% of prior Fall reconciliation. Deposit funds in interest bearing account and monitor interest to return to CSAC.</td>
<td>Aug; monitor interest earnings</td>
</tr>
<tr>
<td>College</td>
<td>Makes Cal Grant and financial aid disbursements to students.</td>
<td>Beginning of Fall term; weekly</td>
</tr>
<tr>
<td>College</td>
<td>Reports Cal Grant Payment Activity to report payments and obtain additional Cal Grant funds.</td>
<td>Aug; weekly</td>
</tr>
<tr>
<td>College</td>
<td>Reviews Accept/Reject Payment reports. If rejected, update and transmit corrections, and monitor for Accept/Reject reports.</td>
<td>Aug; weekly</td>
</tr>
<tr>
<td>College</td>
<td>Adjusts amounts for students not attending full-time, prorates award and adjust financial aid packages. FT = Full Time (12 or more units) TT = Three quarter Time (9 – 11 units) HT = Half Time (6 – 8 units)</td>
<td>Aug, weekly</td>
</tr>
<tr>
<td>College</td>
<td>Reviews Monthly Payment Activity Report for reconciliation.</td>
<td>Aug, monthly</td>
</tr>
<tr>
<td>College</td>
<td>Monitor student awards for any changes including withdraw and calculate return funds for federal and state aid.</td>
<td>Aug, weekly</td>
</tr>
<tr>
<td>Community College</td>
<td>Sends enrollment data and GPA data for C2 Competitive cycle.</td>
<td>Sep</td>
</tr>
<tr>
<td>College</td>
<td>Works with US Department of Education (ED) and FAM vendors to prepare for new aid year cycle.</td>
<td>According to ED system update calendar for new</td>
</tr>
<tr>
<td>College</td>
<td>Works to complete all roster payment adjustments and corrections prior to September 30 for prior award year.</td>
<td>Keyed in WebGrants or electronic file</td>
</tr>
<tr>
<td>---------</td>
<td>----------------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------</td>
</tr>
<tr>
<td>College</td>
<td>Works to close out reconciliation for prior award year. Sends check invoice amount to CSAC if required.</td>
<td>Paper check to CSAC</td>
</tr>
<tr>
<td>College</td>
<td>Calculates earned interest and sends check to CSAC for prior award year.</td>
<td>Paper check to CSAC</td>
</tr>
</tbody>
</table>
## CHAFEE GRANT PROCESS

<table>
<thead>
<tr>
<th>WHO</th>
<th>WHAT</th>
<th>HOW</th>
<th>WHEN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student</td>
<td>Files FAFSA and submits to Central Processing System (CPS). Requires FSA ID or paper signature.</td>
<td>Online or by paper to CPS</td>
<td>• Oct 1, no deadline.</td>
</tr>
<tr>
<td>AB 540 student</td>
<td>AB 540 students complete the California Dream Act Application (CADA) and submits to CSAC.</td>
<td>Online in WebGrants or paper to CSAC</td>
<td>• CADA is available after Jan 1.</td>
</tr>
<tr>
<td>Student</td>
<td>Submits Chafee Grant Application to CSAC. Renewals do not need a subsequent Chafee Grant Application.</td>
<td>Online in WebGrants or paper</td>
<td>?</td>
</tr>
<tr>
<td>CSAC</td>
<td>Reviews Chafee Grant eligibility including:</td>
<td>GDS</td>
<td>After Chafee Grant Application received</td>
</tr>
<tr>
<td></td>
<td>• CA Resident</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Financial Need</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Priority awarding criteria:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Paid Renewal students not reached 23 years as of July 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• New and non-paid renewal students who will be 22 years as of July 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• New and non-paid renewal students who have dependents</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• New and non-paid renewal students who have an unmet need of $5,000 or more</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• New and non-paid renewal students who have unmet need of less than $5,000.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CSAC</td>
<td>Verifies Foster Youth status with CA Dept. of Social Services (CDSS)</td>
<td>Electronic file?</td>
<td>After Chafee Grant Application is received</td>
</tr>
<tr>
<td>Student</td>
<td>If CDSS does not verify Foster Youth status, completes Foster Care Eligibility Certification Form to get certified by county. Sends to CSAC</td>
<td>Paper form</td>
<td>After review with CDSS and no match</td>
</tr>
<tr>
<td>CSAC</td>
<td>Processes Foster Care Eligibility Certification Form</td>
<td>Keyed in WebGrants</td>
<td>After Foster Care Eligibility Form received</td>
</tr>
<tr>
<td>CSAC</td>
<td>Reviews for Eligibility, awards student, notifies student</td>
<td>GDS, email to student</td>
<td>After all above steps completed</td>
</tr>
<tr>
<td>CSAC</td>
<td>Sends funds to college</td>
<td></td>
<td>After award is made</td>
</tr>
<tr>
<td>College</td>
<td>Reviews for Eligibility:</td>
<td></td>
<td>After notification of award is received</td>
</tr>
<tr>
<td></td>
<td>• Enrolled at least half-time</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Enrolled in a program at least one academic year long</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Maintain SAP</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
- Demonstrate Financial Need
  May need to adjust previously awarded financial aid.

<table>
<thead>
<tr>
<th>College</th>
<th>Disburses Chafee Grant to student, reports payment to CSAC.</th>
<th>FAM</th>
<th>After funds are received.</th>
</tr>
</thead>
<tbody>
<tr>
<td>College</td>
<td>Reports Chafee payment to CSAC.</td>
<td>WebGrants</td>
<td>After disbursement is made.</td>
</tr>
</tbody>
</table>
A 4-year postsecondary award program for eligible high school graduates.

**Program Purpose and Selection: CAL Grant A Awards seek to make postsecondary education at California 4-year postsecondary institutions accessible for all eligible students.**

**Authorizing Legislation (March 2000 Senate Bill No. 1644, Oti-Z-Pedeco-Poachilgun-Vaissconells-Cal Grant Act)**

**Program Overview:**

**Cal Grant A Entitlement Awards**

Entitlement awards are awarded based on needs assessment and eligibility criteria. These awards are intended to provide financial assistance to eligible students to attend postsecondary institutions.

**Eligibility Requirements:**

- Must be a California resident.
- Must have completed high school or equivalent.
- Must meet financial need criteria.
- Must enroll in a postsecondary institution.

**Program Details:**

- Awards are available for full-time study.
- Awards can be used for tuition, fees, books, and supplies.
- Awards are renewable for up to 4 years, subject to academic performance.

**Application Process:**

- Applications are available online.
- Applications must be submitted by the deadline.
- Applications are reviewed based on financial need and academic performance.

**Effectiveness:**

The program has been effective in increasing access to postsecondary education for eligible students.
Expanding Opportunity, Research Brief | The Century Foundation

540 in 2014.

540 in 2014.

540 in 2014.

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540 in 2014.
In 2013-15 the Cal Grant A income ceiling for a four-person household was $87,200. The asset ceiling was $67,500 and $32,100 for dependent and independent students, respectively.

<table>
<thead>
<tr>
<th>Table 4.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title: EIGHT AGRICULTURAL AWARENESS</td>
</tr>
<tr>
<td>Table: EIGHT AGRICULTURAL AWARENESS</td>
</tr>
<tr>
<td>Column 1: EIGHT AGRICULTURAL AWARENESS</td>
</tr>
<tr>
<td>Column 2: EIGHT AGRICULTURAL AWARENESS</td>
</tr>
<tr>
<td>Column 3: EIGHT AGRICULTURAL AWARENESS</td>
</tr>
</tbody>
</table>

**Legislative History:**

1. Create a “Webinars for Students’ Accoun (.Cal Grant Programs,” 2012).
2. Submit a Webinar Application for Federal Student Aid (FASFA) or CA Dream Act Application.
3. Apply for Cal Grant A.

### Originating Legislation:

**2000 Senate Bill No. 1444: Obligation-Pedagogical-Vesconcellos Cal Grant Act**

In order to be awarded a Cal Grant A, a student must complete three steps:

1. Submit a Webinar Application for Federal Student Aid (FASFA) or CA Dream Act Application.
2. Apply for Cal Grant A.
3. Participate in the Eligibility examination program.

Specific Cal Grant A enrollment requirements for transfer students: Students meeting the above requirements who attend a qualifying institution.

Specific Cal Grant A enrollment requirements for recent high school graduates: Students meeting the above requirements who attend a qualifying institution.

Institution:

- Students must maintain a high school GPA of at least 3.0 (or apply to receive high school graduates)
- Students have demonstrated financial need.
- The student household has an income and asset level not to exceed the Cal Grant A level set forth by CSAC.
- The student has met a high school GPA of at least 3.0 (or apply to receive high school graduates)
- Students have demonstrated financial need.

**Cal Grant B Entitlement Awards**

<table>
<thead>
<tr>
<th>Column 1: Cal Grant B Entitlement Awards</th>
<th>Column 2: Cal Grant B Entitlement Awards</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title: EIGHT AGRICULTURAL AWARENESS</td>
<td></td>
</tr>
<tr>
<td>Table: EIGHT AGRICULTURAL AWARENESS</td>
<td></td>
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<tr>
<td>Column 1: EIGHT AGRICULTURAL AWARENESS</td>
<td></td>
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<tr>
<td>Column 2: EIGHT AGRICULTURAL AWARENESS</td>
<td></td>
</tr>
<tr>
<td>Column 3: EIGHT AGRICULTURAL AWARENESS</td>
<td></td>
</tr>
</tbody>
</table>

**Legislative History:**

1. Create a “Webinars for Students’ Accoun (.Cal Grant Programs,” 2012).
2. Submit a Webinar Application for Federal Student Aid (FASFA) or CA Dream Act Application.
3. Apply for Cal Grant A.

### Originating Legislation:

**2000 Senate Bill No. 1444: Obligation-Pedagogical-Vesconcellos Cal Grant Act**

In order to be awarded a Cal Grant B, a student must complete three steps:

1. Submit a Webinar Application for Federal Student Aid (FASFA) or CA Dream Act Application.
2. Apply for Cal Grant B.
3. Participate in the Eligibility examination program.

Specific Cal Grant B enrollment requirements for transfer students: Students meeting the above requirements who attend a qualifying institution.

Specific Cal Grant B enrollment requirements for recent high school graduates: Students meeting the above requirements who attend a qualifying institution.

Institution:

- Students must maintain a high school GPA of at least 3.0 (or apply to receive high school graduates)
- Students have demonstrated financial need.
- The student household has an income and asset level not to exceed the Cal Grant B level set forth by CSAC.
- The student has met a high school GPA of at least 3.0 (or apply to receive high school graduates)
- Students have demonstrated financial need.
Expanding Opportunity, Reducing Debt | The Century Foundation

540 in 2014

Situation for certain non-resident students who have attended high school in California and received a high school diploma or its equivalent: As of 2000, AB 540 expanded the scope of AB

Be a U.S. citizen or eligible non-citizen
Be a California Resident or AB 540 eligible

Eligibility determination and award process: Eligibility for a Cal Grant A or B is determined through following two standards: general Cal Grant eligibility requirements and entitlement-specific requirements. To meet general Cal Grant requirements, applicants must:

A California public postsecondary educational institution, ( Outreach Program-Vasco High School-CAL Grant ACT 2000)

Finance

1) Federal Supplemental Educational Opportunity Grant Program
2) Federal Work-Study Program
3) Federal Perkins Loan Program
4) Federal Stafford Loan Program
5) Federal Student Aid Programs:

is a California private or independent postsecondary educational institution that participates in the Pell Grant Program and in at least two of the following:

Outlining institutions for Cal Grant B Awards are those with a federal student loan cohort default rate (CDR) below 15.5 percent and a graduation rate above 30 percent

Institutional Requirements:

Outlining institutional requirements: Assuming they continue to meet the federal regulations, any postsecondary institution funding Cal Grant B awards must adhere to the access stipends as well as the access stipends set by the access stipend for the first year in which the student is enrolled in a degree or vocational degree or certificate program.

Program overview:

Attachment

Program overview:

Authorization legislation (March 2020 Senate Bill No. 1644: Outreach Program-Vasco High School-CAL Grant ACT
The asset ceiling was $458,000. The asset ceiling was $67,500 and $32,100 for dependent and independent students.

In 2015-16 the Cal Grant B income ceiling for a four-person household was $49,800. The earnt in both private and public postsecondary institutions (the State Scholarships and Aid Act, “SSS Act”).

In order to be awarded a Cal Grant B entitlement a student must complete these three steps:

1. Complete a Webgrants for Students’ account (Cal Grant Programs, 2022)
2. Submit a high school GPA to CSAC
3. Submit a Free Application for Federal Student Aid (FAFSA) or CA Dream Act Application

Specific Cal Grant Entitlement Award Requirements for Transfer Students: Students who were not previously awarded a Cal Grant but are enrolled in a CSU and are guaranteed a Cal Grant A, are not eligible for aid by March 2 or their senior year in high school of the year following graduation.

Specific Cal Grant Entitlement Award Requirements for Recent high school Graduates: Students meeting the above requirements who attend a qualifying institution.

• The student’s household has an income and asset level not to exceed the Cal Grant B level set forth by CSAC.
• Attend a high school GPA of at least 2.0.
• There is no need for Cal Grant Enriched School.
• No increase in entitlement or in denial on a student loan.
• If made, have met Selective Service Requirements.

More generally, the programs established previously in California, previous regulations established subsistence grants which helped create Cal Grant B as we know it today, but none of the programs established previously

Original legislative intent: To create a program that provides grants to cover the cost of books and room and board, for low-income students who are eligible to enroll in both private and public postsecondary institutions (the State Scholarships and Aid Act, “SSS Act”).
# Original Legislative Intent

This act established competitive scholarships administered by the state. Students must demonstrate financial need and be approved by the Great Scholarships Commission to receive one of the awards. In the original legislation, grants were awarded to two individuals of equal merit, and the number of scholarships each year ("The Great Scholarships") was to increase each year.

Assembly Bill No. 1546: The Great Scholarships Act of 1996

**Legislative History:**

### Eligibility, Determination, and Award Process

To be eligible for Cal Grant A, a student must meet federal financial eligibility requirements. The student must also meet the specific requirements for Cal Grant A, excluding the requirement that they must be enrolled in an entitlement awarded entitlement award.

### Program Purpose and Description

Cal Grant A competitive awards were created to provide financial assistance to students who are eligible for entitlement.

### Program Overview

In the appendix, table 4, can be found in AB No. 97 (Budget Act of 2017 - 2018). There have been additional legislative revisions to this and other Cal Grant programs which are summarized in this section. The current number of this funding and information is set forth by the annual budget act that funds and applies points based on the item in the annual budget. The current funding for this item in the annual budget is $257,500,000. The legislation is effective January 1, 2018.
Legislative history:

Institutional requirements: The same requirements for Cal Grant Entitlement Awards apply to Competitive Awards.

Cal Grant Competitive Awards (Cal Grant Competitive Awards, 2017).

Postsecondary education programs, due to the limited number of awards available to qualifying applicants, California Dream Act applicants currently do not receive postsecondary education programs. Due to the limited number of awards available to qualifying applicants, California Dream Act applicants must apply for Cal Grant B, excluding the requirement that they must be non-eligible for Cal Grant B. To be eligible for Cal Grant Competitive Awards, the applicant must be currently awarded an Entitlement award.

Eligibility determination and award process:

Grant Determination (Main): 2020 Senate Bill No. 1644: Orize-Paddock-Poole-Potion-Vassicellies Cal Grant Act

Program overview:

Competition for Cal Grant A & B programs is limited to California residents and is based on a lottery process. Each year, 10 percent of available awards are reserved for residents enrolled in 2-year postsecondary institutions and another 10 percent are reserved for residents enrolled in 4-year postsecondary institutions. The remaining 80 percent of available awards are reserved for residents who are not eligible for Entitlement awards. The award amount is determined by the available funds and the lottery process.

Amending legislation: 1995 Assembly Bill No. 1546: The Hedges-Dhall-Daune and Donald Doyle Act

In 1995, Assembly Bill No. 1546 was passed. It created the California Dream Act, which provides Cal Grant B to students who were formerly eligible for Cal Grant A but were not eligible for Cal Grant B. This law also created the California Promise Program, which provides Cal Grant B to students who were not eligible for Cal Grant A but were eligible for Cal Grant B. The California Promise Program was later renamed the California Promise Act.

In conclusion, the California Dream Act and the California Promise Act have significantly improved access to postsecondary education for students who were previously not eligible for Cal Grant A or B. These laws have helped to increase enrollment in postsecondary institutions and have had a positive impact on the economy of California.
Attaching the necessary text to the document:

**Exposing Opportunity, Reducing Debt: The Century Foundation**

...continued...

**Legislative History: Original legislative intent This legislation created the Occupational Education and Training Grant Program. This pilot program provided competitive scholarships for students interested in pursuing occupational education and training. (1972)**

...continued...

attachment 1.1
OTHER GRANT OR SCHOLARSHIP PROGRAMS

TIMELINE OF LEGISLATION AUTHORIZING CAL GRANT PROGRAMS: 1955-2015

A budget act of 2017 (AB 377) law the Cal Grant Program, which has been in place since 1955, is discussed in the manual if given to applicants with specific challenges. Funding and amount allocation is decided by the annual budget act currently AB No. 97.
Explanatory Opportunity: Reducing Debt | The Century Foundation

Eligibility determination and award process: To be eligible for the Scholarship, students must meet the annual household income and household asset level requirements in the cost of living in addition to financial requirements. Students must meet general eligibility requirements for Cal Grants under Section 69433.9 of the California Education Code. The maximum annual household income and household asset level is $51,000 in the 2016-17 academic year, but the maximum annual household income and household asset level is $50,000 in the 2016-17 academic year for students in the maximum income family size of 4.


California Middle Class Scholarship Program

Program purpose and description: The Middle Class Scholarship Program provides scholarships to students enrolled in a California State University or the University of California whose annual household income is less than or equal to 150% of the Federal Poverty Level. The program aims to reduce the financial burden for students from middle-class families by providing scholarships that can be used for tuition, fees, and other educational expenses.

Program overview:

Narrative history from original to current: Following Assembly Bill 540 in 2000, both Assembly Bill 130 and Bill 119 were passed in 2011. Assembly Bill 119 and Bill 130 established the Middle Class Scholarship Program. Students who meet the income eligibility requirements and are enrolled in a California State University or the University of California may apply for this scholarship. The program is designed to support students from middle-class families and reduce the financial burden for tuition and fees.

Eligibility determination: In order to be eligible for the California Middle Class Scholarship Program, students must meet the financial eligibility requirements set by the program. Students are considered to be eligible if their annual household income is less than or equal to 150% of the Federal Poverty Level. The program provides scholarships to students who meet these requirements and are enrolled in a California State University or the University of California.

Attachment 1:1
Promoting Safe and Stable Families Amendments of 2001

Program purpose and description: The California Choice Grant Program provides funds for families who were in foster care between the ages of 16 and 18 to pursue education and training. Funding for the program comes from both the federal and state governments.

Narrative history from original to current: The Middle Class Scholarship Program was established by Assembly Bill (AB) 74 (2013) in 2013. Senate Bill (SB) 94 (2013) in 2013. SB 2873, which became law on July 1, 2017, added new provisions to the Education Code.

Original legislative intent: The program aims to make higher education more affordable for middle-class students who are not eligible for financial aid.

70020. California Education Code 2013, Chapter 22.

Applicant program must be approved by the California Commission on Teacher Credentialing. In addition to students enrolled at CSUs and UCs, students enrolled in middle school tertiary academic program (2 CFA) or another academic program. All applications must be submitted by the March 1 deadline. The award amount is based on the student’s financial need. The minimum award amount is $900. The amount of any other financial aid received, and the amount of any other non-need-based aid received, for each $1000 the student receives is determined by their annual household income and other factors.

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Authorization Legislation (main) 2009 Senate Bill No. 47: California National Guard Education Assistance Award Program (CNG EAP)

Program Overview:

California National Guard Education Assistance Award Program (CNG EAP)

2005, funding for new California Grants could only be used at institutions that also met Cal Grant eligibility standards. In 2006, California National Guard Education Assistance Award Program was passed as part of the California Constitution to provide financial assistance to National Guard members and their families. The program is designed to help students attend institutions of higher learning and prepare for careers in fields related to their service in the National Guard.

In 2001, the California National Guard Education Assistance Award Program was expanded to include active duty service members and their families. The program provides financial assistance to students pursuing education and training programs that lead to degrees or certificates in fields related to the National Guard.

Eligibility Criteria:

1. Completion of an application for the CNG EAP
2. Financial need demonstrated by the completion of the Free Application for Federal Student Aid (FAFSA)
3. Demonstration of a strong academic record
4. Membership in the California National Guard

Benefits:

- Tuition assistance
- Course work and training
- Books and supplies
- Transportation

How to Apply:

To apply, visit the California National Guard Education Assistance Award Program website at cng.edu to complete the application process.

Additional Information:

- The program is available to active duty service members and their families.
- The program is administered by the California Department of Education and the California National Guard.
- For more information, visit the California National Guard Education Assistance Award Program website at cng.edu.
Recognizing that the program be allowed to sunset due to lack of participation and uncertain outcomes (April, 2016), a bill (SB 649, introduced in 2009, with National Guard members able to apply starting January 1 of the 2009-10 academic year, was introduced to continue the program. By passing SB 649, the legislature aimed to continue the program through the 2010-11 academic year.

The original legislative intent was to provide higher education opportunities to National Guard members and their families. However, the program was not renewed for each academic year. The program was terminated after five years of full-time enrollment or however long the applicant would remain in the California National Guard. The program was designed to encourage National Guard members to continue their education and pursue higher education opportunities.

For eligibility, applicants must have served in the California National Guard for at least two years, be a resident of California, and be able to meet the educational requirements. The program provided educational assistance to members of the National Guard, veterans, and their families, with a focus on providing educational opportunities and support.

The program was designed to provide educational assistance to members of the National Guard and veterans who had completed their service obligation. The program aimed to encourage continued education and professional development, recognizing the unique contributions of National Guard members and their families.
the same amounts as the loans the previous program had assumed (1997). The assumption program into a grant program would affect more students into the child care at about the same cost as the grant program would provide awards in about 95% of cases. With that in mind, the loan and assumption programs had assumed from low participation rates. CSAC, which sponsored AB 957, hoped that reducing the loan care and development field, the loan assumption program cut back on participation and reduced the child care. The existing child development teacher loan assumption program, which had been established in 1992, although intended to attract students into the field, did not have the desired effect. The Child Development Teacher and Supervisor Grant Program was established to replace the existing fields with the following: in 1997, via Assembly Bill No. 957, the Child Development Teacher and Supervisor Grant Program was established to

Original Legislative Intent: The legislative intent is to attract students into the field of child care and development.

The Child Development Teacher and Supervisor Grant Program was established to replace the existing fields with the following: in 1997, via Assembly Bill No. 957, the Child Development Teacher and Supervisor Grant Program was established to

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The scholarship amount that a student receives under the LEP matches the amount that a student would receive for a Cal Grant scholarship. In addition, LEP grant recipients are not eligible for receiving Cal Grants (Cal. Labor Code § 4709).

Fact Sheet: 2006.

comprehensive under division 4.0 of 4.5 (starting with Section 6100) of the California Labor Code ("LAW Enforcement Personal Dependents (LEPD) Grant Program"), which allows for law enforcement officers, and death beneficiaries and other documentation necessary to show the amount that a student would receive for a Cal Grant scholarship. In addition, LEP grant recipients are not eligible for receiving Cal Grants (Cal. Labor Code § 4709).

eligibility determination and award process: To be eligible to apply, the applicant must be enrolled as an undergraduate student in at least six units at a California institution of higher education. The law enforcement personal dependent grant program (LEPD) offers scholarships to the spouses and children of California law enforcement officers of the department of corrections and rehabilitation or the department of youth authority in California, and includes along with law enforcement officers.

Program overview:

LEPD offers new awards (Child Development Grant Program) 2012. Assembly Bill 281 was enacted in 2022 to repeal the Child Development Teacher Loan

The 1997 bill was written so that the program would sunset in 2002. Assembly Bill 281 was enacted in 2022 to repeal the Child Development Teacher Loan

attachment 1.1

attachment 1.1

attachment 1.1
Applicants to the program are nominated for their awards; current students are nominated by their postsecondary institution. Districts inns are nominated by their local school districts. Applicants to the program are nominated for their awards. Current students are nominated by their postsecondary institution. Districts inns are nominated by their local school districts.

For district nominations to be eligible, they must have a bachelor's degree, have passed the California Basic Educational Skills Test (CBEST), have not delayed on school ranked in the lowest two deciles on the Academic Performance Index (API) for 2 years or more, and meet the following eligibility requirements:

- Must be a teacher, teacher's aide, or teacher aide.
- Must have received a teaching credential or temporary teaching permit.
- Must have taught in a public school for at least 5 years at a school ranked in the lowest two deciles on the API for 2 years or more.
- Must have a bachelor's degree in education.
- Must have a valid teaching credential.

Program Purpose and Eligibility

The Assumption Program of Loans for Education (APLE) is a State-approved, comprehensive loan forgiveness program for K-12 teachers and school administrators in California. The program is designed to provide financial assistance to teachers and administrators who have taught in public schools for at least 5 years and have a valid teaching credential. To be eligible for the program, participants must meet the following eligibility requirements:

- Must have received a teaching credential or temporary teaching permit.
- Must have taught in a public school for at least 5 years at a school ranked in the lowest two deciles on the API for 2 years or more.
- Must have a bachelor's degree in education.
- Must have a valid teaching credential.

Loan Assumption Programs

Assumption Program of Loans for Education (APLE)
The California Student Aids Commission (CSAC) is authorized to administer the California Grant Program, which provides grants to college students who meet certain eligibility requirements. However, the program has faced challenges in increasing the number of students who receive these grants. The 2013-14 budget act (AB 1276) aimed to increase the number of grants awarded by increasing the grant amount from $3,000 to $5,000 per year. Additionally, the budget included funding for programs that support college access and completion.

To address the issue of college access, the CSAC has implemented several initiatives. These include increased funding for California Grant Program (Cal Grant) and California Student Aid (CSA) programs, as well as the expansion of Cal Grant eligibility to include more students who are economically disadvantaged. The budget also allocated funds for the California Promise Program, which provides tuition and fee waivers for community college students.

Despite these efforts, the number of students who receive Cal Grant funding remains relatively low. The CSAC has been working to improve the grant application process and increase awareness of the program among students. Additionally, the agency has been collaborating with community colleges and other organizations to promote college access and completion.

Overall, while progress has been made in increasing college access and funding for students, there is still room for improvement. The CSAC and its partners continue to work towards ensuring that more students have access to higher education and the opportunities that come with it.
attachment 1.1
The applicant will also be evaluated on the following criteria before being accepted into the program:

- Cannot be delinquent on any student loans
- Making satisfactory academic progress
- Be a California resident
- Be a U.S. citizen

Eligibility determination and award process: In order to be eligible for this program and individual must:

- The program will assume up to $8,333 per year that an individual has taught nursing studies at an accredit institution.

Program purpose and description: The intended purpose of this program is to increase the number of nursing faculty members at California college, career, and universities.

Program overview:

The Graduate Apple (GAP) program is intended to assist more students into graduate education in order to fill a growing need for new faculty caused by rising college enrollments and the retirements of existing faculty. In addition, it acknowledges the increase in the cost of higher education as a reason that students do not

- Other recommendations
- Interviews
- Faculty evaluations
- Test scores
- Grade point average

State Nursing Assumption Program for Loans for Education (SNAP)
default on any education loans. In 2016, the award amount for the grant program for each recipient was $473. Individuals must remain employed as a prosecutor or public defender for at least three years and is not currently in

Eligibility determination and award process; Individuals must remain employed as a prosecutor or public defender for at least three years and is not currently in

Emergency Services and administered by CSAC.

Program purpose and description; The 2008 JRF Act established with U.S. Code §3792-2 provides loan repayment assistance for local, state, and federal public

Authorizing legislation (main); 2008 John R. Justice (JRF) Prosecutors and Defenders Incentive Act (JRF Act)

Program overview;

John R. Justice (JRF) Program

SB 3112, as of 2012 SNAP-EFNEP specifies for nursing employees at certain state facilities; however, as of 2012 SNAP-EFNEP is considered to be in active program (California

SB 930 established those teaching partners to be eligible for payments. After they have worked the equivalent of three full-time academic years, in addition. SB 930 established

SB 6 established in 2005 through SB 63 of the California Education Code. The program was

Legislative history of budget relief for eligible graduate students to complete degree. SB 63 of the California Education Code. The program was

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Legislative history of budget relief for eligible graduate students to complete degree. SB 63 of the California Education Code. The program was

SB 63 established in 2005 through SB 63 of the California Education Code. The program was

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### Table 1: Maximum Cal Grant Awards by Program and Institution Type, 2015-16

<table>
<thead>
<tr>
<th>Institution Type</th>
<th>First-Year</th>
<th>Second-Year</th>
<th>Third-Year</th>
<th>Fourth-Year</th>
<th>Non-Year 1</th>
<th>Non-Year 2</th>
<th>Non-Year 3</th>
<th>Non-Year 4</th>
<th>Private Yr 1</th>
<th>Private Yr 2</th>
<th>Private Yr 3</th>
<th>Private Yr 4</th>
<th>Public Yr 1</th>
<th>Public Yr 2</th>
<th>Public Yr 3</th>
<th>Public Yr 4</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$1,179</td>
<td>$1,642</td>
<td>$1,980</td>
<td>$2,462</td>
<td>$1,796</td>
<td>$1,796</td>
<td>$1,796</td>
<td>$1,796</td>
<td>$1,796</td>
<td>$1,796</td>
<td>$1,796</td>
<td>$1,796</td>
<td>$1,796</td>
<td>$1,796</td>
<td>$1,796</td>
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<tr>
<td></td>
<td>$9,084</td>
<td>$9,084</td>
<td>$9,084</td>
<td>$9,084</td>
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<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
</tr>
</tbody>
</table>
| Source: California State Budget Act of 2015

**Notes:**
- Cal Grant C Award recipients: Second to Fourth-Year.
- First-year recipients: Cal Grant B.
- Cal Grant A.
- Cal Grant Awards.
- Books/supplies initiation/fees.
### Table 1.1

#### CAL Grant B

<table>
<thead>
<tr>
<th>Institution Type</th>
<th>Living Situation</th>
<th>Living Situation</th>
<th>Living Situation</th>
<th>Living Situation</th>
<th>Living Situation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>First Year</td>
<td>After First Year</td>
<td>First Year</td>
<td>After First Year</td>
<td>First Year</td>
</tr>
<tr>
<td>University of California</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>California State University</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>Public Institutions</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Living on campus</td>
<td>Living on campus</td>
<td>Living on campus</td>
<td>Living on campus</td>
<td>Living on campus</td>
</tr>
<tr>
<td></td>
<td>Living off campus</td>
<td>Living off campus</td>
<td>Living off campus</td>
<td>Living off campus</td>
<td>Living off campus</td>
</tr>
<tr>
<td></td>
<td>Living with Family</td>
<td>Living with Family</td>
<td>Living with Family</td>
<td>Living with Family</td>
<td>Living with Family</td>
</tr>
<tr>
<td></td>
<td>Living with Family</td>
<td>Living with Family</td>
<td>Living with Family</td>
<td>Living with Family</td>
<td>Living with Family</td>
</tr>
</tbody>
</table>

Living on campus, living off campus, living with family, and living away from home. A study by the Century Foundation found that...
<table>
<thead>
<tr>
<th></th>
<th>Annual Award, Average (dollars)</th>
<th>Total Dollars</th>
<th>Recipients</th>
<th>Number of Awards</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.997</td>
<td>323,902</td>
<td>2,443.16</td>
<td>36</td>
<td>14,800.000</td>
</tr>
<tr>
<td>3.219</td>
<td>0</td>
<td>365</td>
<td>8.598</td>
<td>0</td>
</tr>
<tr>
<td>6.190</td>
<td>161,020</td>
<td>927</td>
<td>3,595</td>
<td>72,000</td>
</tr>
<tr>
<td>6.74</td>
<td>218,476</td>
<td>2,377</td>
<td>237</td>
<td>43,920</td>
</tr>
<tr>
<td>6.68</td>
<td>88</td>
<td>49.420</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Other grants

Cal Grant C
Cal Grant B
Cal Grant A

Cal Grant awards (entitlement and competitive)

Student Aid Commission-Administered Programs: 2015-16

Table 3. Number of undergraduate financial aid recipients, total dollars awarded, and average award amounts by California recipients

<table>
<thead>
<tr>
<th></th>
<th>Living off campus</th>
<th>Living with family</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Four-year college</td>
<td>Four-year college</td>
</tr>
<tr>
<td>9.74</td>
<td>1.6</td>
<td>2.3</td>
</tr>
<tr>
<td>12.0</td>
<td>2.9</td>
<td>7.2</td>
</tr>
<tr>
<td>Bill</td>
<td>Year</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
<td>------</td>
<td>-------------</td>
</tr>
<tr>
<td>SB 182</td>
<td>2010</td>
<td>California Senate Bill 182, Education Committee on Higher Education, Chapter 225, Senate of 2009. Committee on Various Affairs. Cal Grants (AB)</td>
</tr>
<tr>
<td>AB 2006</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SB 97</td>
<td>2003</td>
<td>California Senate Bill 97 (AB) Chapter 239, Senate of 2003.</td>
</tr>
<tr>
<td>SB 728</td>
<td>2003</td>
<td>Summary of Revision to the Ortiz-Pacheco-Poockhigh-Vasconcellos Cal Grant Program of 2000: 2003 through 2016</td>
</tr>
</tbody>
</table>

Table 4: Adopted Revisions to the Ortiz-Pacheco-Poockhigh-Vasconcellos Cal Grant Program of 2000: 2003 through 2016
Table 4: Adopted Revisions to the Ortiz-Pacheco-Poochigian-Vasconcellos Cal Grant Program of 2000: 2003 through 2016 (contd)

<table>
<thead>
<tr>
<th>Year</th>
<th>SB 1028</th>
<th>AB 2936</th>
<th>SB 570</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td></td>
<td></td>
<td>2011</td>
</tr>
<tr>
<td>2012</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **2011**: Amended report requirements to include participation in STEM, career and technical education programs, and exam performance rates for specific undergraduate public postsecondary institutions.
- **2012**: Added requirements related to the eligibility of nontraditional students in the Cal Grant Program.
- **2028**: Revised the eligibility requirements to include participation in STEM, career and technical education programs, and exam performance rates for specific undergraduate public postsecondary institutions.

### Summary of Revisions

- **SB 1028**: Changes to the eligibility requirements for the Cal Grant Program.
- **AB 2936**: Amendments to the Cal Grant Program to include participation in STEM, career and technical education programs, and exam performance rates for specific undergraduate public postsecondary institutions.
- **SB 570**: Revisions to the Cal Grant Program to include participation in STEM, career and technical education programs, and exam performance rates for specific undergraduate public postsecondary institutions.

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**Note**: This table is adapted from the Ortiz-Pacheco-Poochigian-Vasconcellos Cal Grant Program of 2000: 2003 through 2016 (contd) report.
<table>
<thead>
<tr>
<th>Year</th>
<th>Bill</th>
<th>Summary of Revision</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>SB 1314</td>
<td>Allows students to receive Cal Grants if they were enrolled in upper division coursework or a bachelor’s degree program at a community college.</td>
</tr>
<tr>
<td>2014</td>
<td>AB 470</td>
<td>Reverses eligibility of institutions from “participating” to “nonparticipating” for the following federal programs: Federal Work Study, Stedman loan program, and SEOGP.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Year</th>
<th>Bill</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
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<td>SB 1314</td>
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</tr>
</tbody>
</table>

Table 4. Adopted Revisions to the Ortiz-Pacheco-Pozzi-Cutler-Vasconcellos Cal Grant Program of 20200: 2003 through 2016 (cont’d)
<table>
<thead>
<tr>
<th>States of 2016</th>
<th>CCC Transfer Students</th>
<th>Cal Grant Entitlement for Birthdays</th>
</tr>
</thead>
<tbody>
<tr>
<td>1449 (Lopez, Chapter 433, California Assembly Bill)</td>
<td>Student was a resident of the state on their 18th birthday.</td>
<td>Example: Student from requirement of graduating from a California high school or equivalent in a</td>
</tr>
</tbody>
</table>

Attachment 1.1
APPENDIX 7

Cost of Attendance

The Cal Grant program as currently designed focuses on covering tuition and fees for students with financial need but provides only limited support for living expenses. Tuition and fees comprise a relatively small share of the expenses students must cover while they are in college. This is particularly true for community college students, many of whom benefit from the BOG tuition waiver/California Promise and do not face tuition and fee charges. But even at the University of California, where tuition and fees are about $14,000 a year, these charges constitute only about 40 percent of the estimated budget for students living on campus.

The question of equitable subsidies for college students’ living expenses is not simple. Unlike tuition and books, housing and food costs are expenses everyone faces, whether or not they are students. But being in school requires time for classes and studying. Working full time while in college significantly lowers the probability of academic success. So, forgone earnings because of time out of the labor force are a very real cost of being in college. Without assistance covering these costs, many students face daunting financial barriers. Even students who live at home with their parents frequently have to contribute to help cover living expenses.¹

Students can cover a portion of their living expenses through work and loans, but not the full amount. Some grant aid is necessary for students whose parents cannot cover their living expenses.

Our proposal suggests a maximum self-help level of $11,000 for UC and CSU students in Step 1, with the legislature appropriating enough funds to lower that self-help over time to meet CSAC-identified affordability targets that allow for reasonable work expectations and little or no debt. We propose an $8,000 maximum for community college students in Step 1. It is reasonable that opting for this less expensive route should lower the financial burden for these students, who are more likely to be juggling family responsibilities and whose post-college incomes are likely to be lower, making repaying debts more challenging. Again, the goal should be to reduce—but not eliminate—the level of self-help over time.

It is counterproductive for the state to put considerable resources into making tuition and fees affordable but to ignore the remaining financial barriers that will diminish the share of students who succeed in earning degrees in a timely manner; however, the state needs a new, more consistent method of calculating those financial costs

Estimating cost of attendance

If the financial aid system is going to base subsidies on the full cost of attendance, including housing, food, books and supplies, transportation, and other basic living expenses, there should be a reasonable and equitable way to estimate these expenses. Currently, campuses derive student budgets through surveys or other strategies. There is little consistency.

¹ For example, a 2015 survey of Wisconsin students found that 39 percent of students surveyed paid rent and most paid for food. Sara Goldrick-Rab, The Real Price of College, https://tcfdotorg.atavist.com/the-real-price-of-college.
On-campus room and board charges across UC campuses in 2017-18 ranged from $13,115 in San Diego to 35 percent more—$17,549—at Berkeley. At UC San Diego, the budget beyond tuition, fees, and books is slightly lower for on-campus than for off-campus students. The on-campus premium at the other UC institutions ranges from $1,607 at UCLA to $8,295 at Merced.

There are clearly geographical differences in cost across the state, but there is considerable variation in budgets even within geographical areas. For example, Berkeley City College budgets more than UC Berkeley for students living in apartments, but about half as much for those living at home with parents. San Francisco State budgets slightly more than UC Berkeley for students living in apartments, but charges considerably less for its dormitories. UC Riverside budgets $6,000 less than Riverside City college for students living off campus.

### Variation in living expense budgets: San Francisco Area and the Riverside Area

<table>
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<th>UC Berkeley</th>
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<td>n/a</td>
</tr>
<tr>
<td>In an apartment</td>
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<tr>
<td>At home with parents</td>
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<table>
<thead>
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<th>UC Riverside</th>
<th>CSU San Bernardino</th>
<th>Riverside City College</th>
</tr>
</thead>
<tbody>
<tr>
<td>In a dorm</td>
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<td></td>
</tr>
<tr>
<td>In an apartment</td>
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<tr>
<td>At home with parents</td>
<td>$10,883</td>
<td>$2,557</td>
<td>$4,374</td>
</tr>
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</table>

Source: NCES, College Navigator

The variation in budgets for books and supplies also raises questions about consistency in the methodology used across institutions. Most (but not all) community colleges budgeted $1,854 in 2017-18. The highest UC book budget was $1,357 at UC Irvine, and Berkeley budgeted just $891.

We recommend that CSAC set geographically-sensitive budgets for non-tuition and fee expenses and use them to define the expectation that campuses meet need. Cal Grants should not differ based on living in a dorm versus an apartment, but institutions with more expensive dorms would have to provide more generous institutional grants in order to preserve the standard self-help amount and hit CSAC-identified affordability targets. Schools that do not meet those targets will have to include standard notices on their award letters that their high housing prices prevent them from meeting the state’s affordability standards. This policy should encourage campuses to keep their on-campus living options more affordable.
Students living at home

California public colleges and universities also vary significantly in how they account for expenses associated with living at home. UC campuses add about $7,000 in “other” expenses to the budgets of students living at home, for whom budgets do not include a room and board component. Community colleges add an average of about $600 in other expenses beyond those allowed for students living off-campus. (De Anza, Foothill, and Berkeley City are among the community colleges not adding at all to the other expenses budgets for students living at home; San Jose City College adds about $5,500.) CSU institutions do not provide any extra allowance.

These is no reason to believe that the expenses facing students living at home would vary so much depending on the segment in which they are enrolled. For the Cal Grant, CSAC should establish a standardized methodology to calculate these students’ budgets, allowing for the reality that there are costs associated with an extra person living in the household and for the need for students to contribute to their family’s expenses. This practice will raise the estimated cost of attendance for community college and CSU students living at home.

Estimating costs across living arrangements

Even with budgets standardized across institutions, the revised Cal Grant system still must address the different costs facing students who choose different living arrangements. Should a student living at home receive the same level Cal Grant and institutional aid as a student living in campus housing, perhaps measuring cost of attendance by taking an average of the costs of the two? Or should the cost of attendance (and resulting aid level) vary based on the student’s living situation?

Providing incentives for students to live at home by using an average cost of attendance that effectively underfunds on-campus housing and slightly over-funds students living at home could have a range of impacts on access and success. On the one hand, some students do not have the option to live at home. Moreover, there is significant evidence that living on campus can have a positive impact on student success.\(^2\) On the other hand, there could be real savings to both students and the state from encouraging living at home. In other words, there are benefits and drawbacks to both approaches.

We recommend an approach that both makes on-campus living accessible for low-income students by meeting need (assuming a reasonable self-help) for students who live on campus, but also allows students to work less or take on less debt, through a lower self-help requirement, should they choose to save money and live at home. CSAC should:

- Develop a cost of living assessment for students living on campus or in apartments with the standard affordability target discussed above that assumes a self-help total of $11,000 for at UCs and CSUs, and $8,000 for community college students.
- Develop a cost of living assessment that more consistently and fairly takes into account costs most students still bear while living at home, but set the affordability target by assuming a lower self-help target for students who choose this money-saving option.

This approach makes living on campus an accessible option for all students, while still giving students the option of working less or taking on less debt by going the cheaper route.


Expanding Opportunity, Reducing Debt | The Century Foundation
Impact of cost of living on CSAC-provided Cal Grant award levels

While our recommendations establish Cal Grant Awards that would generally be consistent for all Pell Grant recipients in a segment, with institutional award levels varying to fill in gaps in need at UC and CSU, the lower cost of attendance for students living at home does create some caveats to that general rule. Specifically, because Pell grants, Cal Grants, plus the self-help requirement cannot exceed total cost of attendance, some CSU and perhaps UC students living at home may receive lower CSAC-provided Cal Grant awards than other Pell recipients. At community colleges, where CSAC awards will be designed to meet need without an institutional supplement, there is likely to be more variation in award amounts.

CSAC-provided Cal Grant awards for these categories of students may vary:

- Some students living at home and attending CSU and possibly UC will receive smaller grants because of the lower cost of attendance.
- Students living at home and attending community colleges will receive smaller grant than those living on their own. However, because they will have a lower self-help expectation, the difference in award levels will be smaller than the difference in COA. Cal Grant award levels will taper down from the maximum level for as family income rises.

Part-time students

Many community college students enroll part time. They clearly have lower tuition and book charges than full-time students. They also have more time to work. (Their higher earnings are reflected in higher EFCs, but not until the third year of enrollment, when EFC is based on income during the calendar year in which they were first enrolled.) Except in rare situations, the federal Pell Grant award is a function of EFC, but not cost of attendance. The award is pro-rated for attendance intensity with, for example, half-time students receiving half of the award they would get if they were full time. The simplest adjustment to the Cal Grant would take the same approach. In the example above of a $7,000 Cal Grant for community college students student, half-time students would receive $3,500 Cal Grants.

The system is designed to meet the need of full-time students. It pro-rates awards for part-time students without addressing the question of measuring need among these students, a process that the federal student aid system also avoids.
APPENDIX 8

Legislative Specifications

Personalized Estimates

- Require the California Franchise Tax Board to include an option on the state income tax return for a taxpayer to request information about college expenses and aid for the taxpayer or a dependent based on information available from the taxpayer’s tax return.
- Amend section 19557 of the California Revenue and Taxation Code, which allows CSAC to receive income information regarding financial aid applicants with the applicants’ permission, to allow CSAC to receive such information for the purposes of preparing and providing estimates of college expenses and aid.
- Require institutions, as a condition of participating in the Cal Grant program:
  - To provide CSAC with electronic access to the college’s net price calculators (which are already required for colleges participating in federal aid programs);
  - To provide admitted students with financial aid offers in a format that makes them comparable to other colleges’ offers through a format selected by CSAC.

Merging the Cal Grant Programs

[The report notes that there are at least three ways that the combination of Cal Grants and institutional aid can be spread more broadly and stacked to address students’ total needs. This version maintains a Guaranteed Cal Grant for UC and CSU that is equal to tuition and fees, through a required match by the institution. Institutional aid would be provided (at the discretion of the institutions or systems) in addition to that aid in order to meet the affordability target].

Statement of Legislative Intent

It is the intent of the Legislature to make it possible for every California resident to enroll in college to earn an undergraduate degree without having to work more than a modest amount, and with minimal if any borrowing. To achieve this goal, the Legislature recognizes that financial aid must include support for expenses beyond tuition and fees, and that adequately addressing students’ needs requires a combination of federal, state, and institutional aid.

- The Legislature is establishing an affordability target that limits a student’s need to work or borrow in order to cover college expenses.
- The Legislature intends that state funding for Cal Grants will be sufficient so that the combination of federal, state, and institutional aid is enough for each California resident student’s financial aid package to meet or exceed the affordability target, if institutions help keep dormitory and other costs reasonable.
- The Legislature believes that the most common estimate of a family’s ability to pay, the federal EFC, fails to take into consideration the higher cost of living faced by most Californians. The Legislature requests that the Commission provide recommendations for adjusting the measure for California aid purposes.
- The Legislature has determined that institutional admission and progress requirements make a separate grade point average requirement in the Cal Grant program redundant.
The Legislature has determined that combining family resource measures into an index like the EFC is more appropriate and easier to administer than using income and asset tables.

Unified Cal Grant

Eliminate the separate Cal Grant A, B, C, T and the Middle Class Scholarship.

The Cal Grant Award is:
- Guaranteed to any California resident, regardless of age or time out of school, for a total of up to four years of full-time-equivalent enrollment at a California public institution.
- Available for any year of undergraduate enrollment, for not-less-than-half-time enrollment in any program leading to a degree or certificate program of not more than four months (full time).
- For students enrolling at least half time but less than full time, the amount of the Cal Grant Award shall be the same proportion of it would have been if the student was attending full time.

Definitions

“CSAC-Estimated COA” means an estimate of tuition and fees, food and housing expenses, transportation, personal expenses, and books & supplies. Estimates vary by region, and separate estimates are established for students living on their own (not on campus) and dependent students living at home with one or more parents.

“School-Estimated COA” means the institution of higher education’s estimate of tuition and fees, food and housing expenses, transportation, personal expenses, and books & supplies, based on a student’s living situation.

“Family Resources” means the Commission’s estimate of resources available to a student. For 2019-20: the amount for dependent students shall be the amount of the parent contribution (federal Expected Family Contribution after subtracting the student contribution portion); the amount for independent students students shall be equal to the federal Expected Family Contribution. In subsequent years the amount shall be determined in a manner established by the Commission, taking into consideration differences in regional cost of living.

“Self-Help Expectation” means the amount that a student is expected to contribute toward college expenses through modest work, loans, or both. For 2019-20 the amount of the self-help expectation shall be:
- $8,000 for students enrolling full time in a California community college;
- $11,000 for students enrolling full time in any other institution;

In subsequent years the amounts shall be established by the Commission (or set in the Budget Act by the Legislature upon recommendation of the Commission).
“Affordability target” is the amount of grant aid necessary for a student’s out-of-pocket expenses to meet the self-help expectation. It is equal to the school-estimated COA minus the family resources (including federal grant aid) and the self-help expectation.

“Intended Amount” means the amount of grant aid needed to meet the affordability target, taking into consideration Pell Grants and other grant aid received by a student.

“Adjusted Intended Amount” means the amount of grant aid needed to meet the affordability target, if the affordability target used CSAC-estimated COA instead of school-estimated COA.

“Cal Grant Award” means:
- For UC and CSU, systemwide tuition and fees or the adjusted intended amount, whichever is lower.
- For the California community colleges, the adjusted intended amount.
- For private institutions, the commission component.

“Commission Component” means the Commission’s allocation of grant aid for a student that forms a portion of the Cal Grant Award. For 2019-20 the amount of the commission component for a full-time student shall be equal to:
- For the California community colleges, the adjusted intended amount.
- For UC, $_____ [or X% of systemwide tuition and fees] or a proportionate amount for students who require less than the G.
- For CSU, $_____ [or X% of systemwide tuition and fees] or a portion of the adjusted intended amount that bears the same proportion as $_____ bears to to systemwide tuition and fees.
- For the nonprofit/WASC institutions, the Commission component for UC, except no more than the institution’s average per-student spending on instruction during the three most recent years that federal data are available.

“Institutional Component” means a portion of the Cal Grant Award provided by the institution of higher education. Institutions shall be required, pursuant to the participation agreement with CSAC, to provide an institutional component equal to the difference between the Cal Grant Award and the commission component.

Other Provisions

Studies of Affordability

- The Commission shall arrange for one or more studies of alternative approaches to the federal Expected Family Contribution calculation, including a consideration of regional cost of living adjustments, and make recommendations to the Legislature.

- The Commission shall develop recommended methodologies for determining student expenses other than living expenses for use by California institutions of higher education.
Fund for Innovation in College Affordability

- A fund is established, to be managed over multiple years by the California Student Aid Commission, to test creative approaches to address financial barriers that prevent students from enrolling in or optimizing their participation in college.
- Programs tested through the fund shall be subject to independent evaluations designed in advance of implementation, and by evaluators not selected, managed or paid by the participating institutions or organizations.
Introduction

The Century Foundation (TCF) report *Expanding Opportunity, Reducing Debt: Reforming California Student Aid* recommends substantial reforms to California’s financial aid system, unified by the principle that financial aid should a) be as easy and convenient for students and families to access and understand; and b) better serve students with financial need by covering a greater share of total cost of attendance (COA) than does the current tuition-centered model.

In the interest of providing Commissioners with sufficient time to fully consider the policy, fiscal, and programmatic implications of these changes, staff have prepared this memorandum containing a recommended “Roadmap” to financial aid reform. The Roadmap addresses the components of the TCF report in three distinct stages, spread out over the remainder of the 2018 legislative year and the 2019-2020 budget and legislative sessions.

Taken together, the policy recommendations in these three stages represent a holistic reform of State financial aid and would create a simplified, streamlined system and make college more affordable for hundreds of thousands of students. However, there would be considerable costs associated with most of these reforms, and policy implications that the Commission should consider as well. This Roadmap represents a recommendation from CSAC staff for the process of considering these changes. While the reforms are offered here in three “stages,” the overall approach is comprehensive, and these reforms are being offered in multiple phases to simplify the policy options contained within.

Stage One: The 2018-2019 Budget

The first stage includes issues the Commission has discussed in the past, and that can be addressed in current (Fiscal Year 2018-2019) budget proposals.

Cal Grant B Access Award

The major statewide grant program that provides support for nontuition expenses is the Cal Grant B Access Award (also known as the book and supply award, because it is intended to be used to purchase textbooks and other educational supplies – but can be used to finance any educational expenses a student incurs). Currently, the Access Award provides eligible students with up to $1,672 per academic year, which includes a base grant of $1,648 and an additional $24 that is financed by the College Access Tax Credit.

According to historical sources available to CSAC staff, the Access Award was set at approximately $900 when first implemented in the late 1960s – an amount equivalent to roughly $6,000 in 2017 inflation-adjusted dollars. With over 240,000 students receiving the Access Award in 2018-19, this award is one of the most effective ways of getting grant aid directly in the hands of students with high levels of unmet financial need.

An increase to the Cal Grant B Access Award carries with it a substantial fiscal impact to the State (see chart, below), but could also pay significant dividends, as it would help reduce student food and housing insecurity by providing direct grant aid to low-income students, and would also help by reducing students’ reliance on loan debt.
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<th>FY 2018-19</th>
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<th>FY 2020-21</th>
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<td>Maximum Award</td>
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**Recommendation:**

- Propose budget language and appropriate funding to phase in, over three years, an increase to the Cal Grant B Access Award, starting in the 2018-19 academic year.

**CSAC Outreach and Early Information**

The TCF report recommendations on the Commission’s outreach efforts, including providing early, personalized information on student financial aid estimates, are consistent with recent CSAC efforts, including:

- Expanding outreach to underserved communities, such as through the African-American Student Outreach Initiative.
- Incorporating personalized information about aid estimates, including federal, State, and institutional aid, into CSAC communications and public outreach materials, such as preliminary award notification letters and the net price calculator that will be a part of the modernized WebGrants system.

**Recommendation:**

- Propose budget funding for a permanent, dedicated outreach unit at CSAC (3-5 positions), with a mandate to prioritize efforts on providing information and services related to financial aid and the application process to the most underserved communities in California – including, but not limited to, students of color, rural students, and current and former foster youth.
- Propose statutory language requiring CSAC, as part of our outreach efforts, to provide information to students and families as early as possible regarding their estimated eligibility for federal, State, and institutional financial aid, provided reliable estimates can be attained – but keep this language intentionally broad so as to keep up with changing circumstances (such as the updated WebGrants system, the CSAC website, etc.)
Innovation in Financial Aid

Individual campuses may have innovative new ideas for enhancing college affordability and reducing their students’ overall cost of attendance that have not yet been taken into consideration by the State grant aid system; this proposal would allow the State to not only finance but evaluate and consider the merit of pilot proposals at the campus level. (Some campuses, for example, have experimented with “emergency aid” programs to provide much-needed support for students at risk of dropping out, becoming homeless, etc.)

Under this proposal, the Commission would receive an annual allocation from the State budget and administer grants to institutions, via a competitive application process, that want to experiment with innovative approaches to financial aid. As a condition of receiving these dollars, campuses would be required to perform an independent evaluation of these programs and their outcomes and report back to the Commission. The Commission could then report outcomes to the Legislature and the Administration, recommending statewide funding for any programs that yield positive results.

Recommendation:

- Propose statutory and budget language, accompanied by a budget allocation, creating a Fund for Innovation in College Affordability, and specifying that the Commission shall issue grants from this fund for the purpose of enhancing college affordability for students with high levels of financial need; as a condition of receiving these funds, the receiving institution or segment would report back to the Commission on the results of an independent evaluation of the outcomes of these programs.

Stage Two: The 2018 (or 2019) Legislative Year

The second stage of financial aid reform would involve the Commission considering major policy changes to the construction, eligibility, and award amounts of the Cal Grant program, by consolidating the major current grant programs (Cal Grant A, B, and C, and possibly the Middle Class Scholarship) into a single unified Cal Grant.

Cal Grant Consolidation

Due to the need to study the effects of this proposal further, including the total number of students served and the costs to the State, this component of the reform project would be discussed at the Commission’s June 2018 meeting, with a goal of introducing statutory changes either near the end of the 2018 legislative year or at the beginning of the 2019 legislative year.

Recommendation:

- Direct staff to propose a comprehensive consolidation proposal to the Commission no later than the June 2018 meeting, with a full consideration of the policy, fiscal, and programmatic impact of consolidating all of the current components of the Cal Grant.
program, as well as the Middle Class Scholarship, into a single Cal Grant program. The
development of any such proposal should involve discussions with all key stakeholders,
including, but not limited to, segments, institutions, legislative staff, the Department of
Finance, and students.
  o As much as possible, this consolidation should involve closing up the current
“gaps” in the Cal Grant system, such as the provision limiting the number of
freshmen students at first-year schools eligible for a Cal Grant B tuition and fee
award.
  • If the Commission has had adequate time to review such a proposal and endorses it at
the June 2018 meeting, staff would propose statutory language to the Legislature.

Stage Three: The 2019-2020 Legislative Session and Budget Years

The TCF report recommends that California adopt a substantial overhaul of the current financial
aid system, moving from a system where Cal Grants primarily cover tuition and eligibility is
determined by income and asset ceilings to a more holistic system addressing COA, and
determined instead by unmet need according to Expected Family Contribution (EFC).

While staff feels that there is policy merit to such a model, remaking California financial aid on
this scale requires extensive discussions with policymakers and stakeholders, and deeper
analyses of the likely impact to students, institutions, and to the State. Staff and Commission
liaisons could lead these discussions throughout the remainder of 2018 and into 2019, bringing
any comprehensive reform proposals to the Commission for sufficient deliberation and a vote
sometime in 2019. If the Commission chooses to endorse any major reforms, they would be
introduced as statutory or budget proposals in 2019-2020.

Recommendation:

  • Direct staff, in conjunction with assigned Commission liaisons, to further study the
impact of moving to a financial aid model along the lines of the TCF recommendations,
including, but not limited to, the following elements:
    o Using students’ unmet need after calculating EFC, rather than a fixed income
and asset ceiling, to determine eligibility for, and award amount of, Cal Grants
    o Setting a fixed “affordability target,” including a self-help expectation, as part of
the Cal Grant model
    o Remaking Cal Grant as an entitlement program available to all California
students attending an eligible institution, regardless of GPA, age, or time out of
high school
    o Creating a model whereby institutional aid and State grant aid work together to
provide support for students on a sliding scale according to their financial need
    o Considering the merits and costs of imposing new accountability standards on
private institutions for participating in State financial aid
    o The feasibility of eliminating or modifying current Cal Grant application deadlines
  • Staff will present to Commissioners at a future meeting a proposal for a comprehensive
financial aid reform that meets the requirements directed by the Legislature
(consolidation and further addressing cost of attendance) and considers these
recommendations in the TCF report
The Commission will have the opportunity to fully consider this proposal and, if endorsed, staff will present budget and statutory changes to the Legislature to move to this model.
An act to amend, add and repeal Section 66011 of 70901.3 of the Education Code, relating to postsecondary education.

LEGISLATIVE COUNSEL’S DIGEST

AB 2621, as amended, Medina. Postsecondary education: California Community Colleges.

Existing law establishes the California Community Colleges, under the administration of the Board of Governors of the California Community Colleges, as one of the segments of public postsecondary education in this state. Existing law establishes community college districts throughout the state, and authorizes them to provide instruction at the campuses they operate.

This bill would require the Legislative Analyst’s Office to conduct a study on the feasibility of creating an exclusively online community college and to report its findings to the Legislature on or before July 1, 2019.

Existing law, the Donahoe Higher Education Act, among other things, declares the policy of the Legislature that all resident applicants to California institutions of public higher education, who are determined to be qualified by law or by admission standards established by the respective governing boards, should be admitted to a district of the California Community Colleges, the California State University, or the University of California.
This bill would make nonsubstantive changes to this provision relating to its references to the California Community Colleges and to community college districts and their governing boards.


The people of the State of California do enact as follows:

SECTION 1. Section 70901.3 is added to the Education Code, to read:

70901.3. (a) The Legislative Analyst’s Office shall conduct a study on the feasibility of creating an exclusively online community college, and on or before July 1, 2019, shall report its findings to the Legislature. The report shall include, but not necessarily be limited to, all of the following:

(1) The types of courses that the online community college should offer.
(2) The composition and educational requirements of the faculty who would teach the courses identified pursuant to paragraph (1).
(3) The appropriate governing body for the online community college.
(4) The appropriate role of the Office of the Chancellor of the California Community Colleges and the Board of Governors of the California Community Colleges.
(5) What an accreditation plan should entail for the online community college.
(6) What metrics for success and data gathering should be required and collected by the online community college.
(7) What an outreach plan to potential students should entail for the online community college.

(b) (1) A report submitted pursuant to subdivision (a) shall be submitted in compliance with Section 9795 of the Government Code.
(2) Pursuant to Section 10231.5 of the Government Code, this section shall be repealed on January 1, 2023.

SECTION 1. Section 66011 of the Education Code is amended to read:

66011. (a) It is the policy of the Legislature that all resident applicants to California institutions of public higher education, who are determined to be qualified by law or by admission
standards established by the respective governing boards, should be admitted to either (1) a community college district, in accordance with Section 76000, (2) the California State University, or (3) the University of California.

(b) As used in this part, “governing boards” means the governing boards of community college districts and the Board of Governors of the California Community Colleges, the Trustees of the California State University, and the Regents of the University of California.
An act to amend Section 70901 of the Education Code, relating to postsecondary education.

LEGISLATIVE COUNSEL'S DIGEST


Existing law establishes the California Community Colleges under the administration of the Board of Governors of the California Community Colleges. Existing law authorizes the establishment of community college districts under the administration of community college governing boards, and authorizes these districts to provide instruction at community college campuses throughout the state. Existing law requires the board of governors to develop criteria and standards, in accordance with specified statewide minimum requirements, for the purposes of making the annual budget request for the California Community Colleges to the Governor and the Legislature, and allocating state general apportionment revenues.

This bill would require the Legislative Analyst’s Office to conduct a study of the funding formula used to allocate state apportionments by the California Community Colleges for the 2017–18 fiscal year. The bill would require the Legislative Analyst’s Office to submit a report to the Legislature, on or before July 1, 2019, containing its findings from the study and providing recommendations as to various funding
formula models the Legislature may wish to adopt for use by the California Community Colleges.

Existing law requires the Board of Governors of the California Community Colleges to provide leadership and direction in the continuing development of the California Community Colleges as an integral and effective element in the structure of public higher education in the state.

This bill would make nonsubstantive changes to this law.


The people of the State of California do enact as follows:

SECTION 1. (a) The Legislative Analyst’s Office shall conduct a study of the funding formula used to allocate state apportionments by the California Community Colleges for the 2017–18 fiscal year.

(b) On or before July 1, 2019, the Legislative Analyst’s Office shall submit a report to the Legislature, consistent with Section 9795 of the Government Code, containing its findings from the study and providing recommendations as to various funding formula models the Legislature may wish to adopt for use by the California Community Colleges.

SECTION 1. Section 70901 of the Education Code is amended to read:

70901. (a) The Board of Governors of the California Community Colleges shall provide leadership and direction in the continuing development of the California Community Colleges as an integral and effective element in the structure of public higher education in the state. The work of the board of governors shall at all times be directed to maintaining and continuing, to the maximum degree permissible, local authority and control in the administration of the California Community Colleges.

(b) Subject to, and in furtherance of, subdivision (a), and in consultation with community college districts and other interested parties as specified in subdivision (c), the board of governors shall provide general supervision over community college districts, and shall, in furtherance of those purposes, perform the following functions:
(1) Establish minimum standards as required by law, including, but not limited to, all of the following:
   (A) Minimum standards to govern student academic standards relating to graduation requirements and probation, dismissal, and readmission policies.
   (B) Minimum standards for the employment of academic and administrative staff in community colleges.
   (C) Minimum standards for the formation of community colleges and districts.
   (D) Minimum standards for credit and noncredit classes.
   (E) Minimum standards governing procedures established by governing boards of community college districts to ensure faculty, staff, and students the right to participate effectively in district and college governance, and the opportunity to express their opinions at the campus level and to ensure that these opinions are given every reasonable consideration, and the right of academic senates to assume primary responsibility for making recommendations in the areas of curriculum and academic standards.

(2) Evaluate and issue annual reports on the fiscal and educational effectiveness of community college districts according to outcome measures cooperatively developed with those districts, and provide assistance when districts encounter severe management difficulties.

(3) Conduct necessary systemwide research on community colleges, and provide appropriate information services, including, but not limited to, definitions for the purpose of uniform reporting, collection, compilation, and analysis of data for effective planning and coordination, and dissemination of information.

(4) (A) Provide representation, advocacy, and accountability for the California Community Colleges before state and national legislative and executive agencies.
   (B) In order to wholly engage in the recognition review process of an accrediting agency pursuant to subdivision (c) of Section 72208, conduct a survey of the community colleges, including consultation with representatives of both faculty and classified personnel, to develop a report to be transmitted to the United States Department of Education and the National Advisory Committee on Institutional Quality and Integrity that reflects a systemwide evaluation of the regional accrediting agency based on the criteria used to determine an accreditor’s status.
(5) (A) Administer state support programs, both operational and capital outlay, and those federally supported programs for which the board of governors has responsibility pursuant to state or federal law. In so doing, the board of governors shall do all of the following:

(i) (I) Annually prepare and adopt a proposed budget for the California Community Colleges. The proposed budget shall, at a minimum, identify the total revenue needs for serving educational needs within the mission, the amount to be expended for the state general apportionment, the amounts requested for various categorical programs established by law, the amounts requested for new programs and budget improvements, and the amount requested for systemwide administration.

(ii) The proposed budget for the California Community Colleges shall be submitted to the Department of Finance in accordance with established timelines for development of the annual Budget Bill.

(iii) To the extent authorized by law, establish the method for determining and allocating the state general apportionment.

(B) The board of governors may enter into a direct contract with the Academic Senate for the California Community Colleges for the purpose of supporting statewide initiatives, projects, and programs within the purview of the Academic Senate for the California Community Colleges. If the board of governors elects to enter into a direct contract with the Academic Senate for the California Community Colleges, the contract shall specify the objectives and the expected outcomes of the contract.

(6) (A) Establish minimum conditions entitling districts to receive state aid for support of community colleges. In so doing, the board of governors shall establish and carry out a periodic review of each community college district to determine whether it has met the minimum conditions prescribed by the board of governors.

(B) In determining whether a community college district satisfies the minimum conditions established pursuant to this section, the board of governors shall review the regional accreditation status of the community colleges within that district.
(7) Coordinate and encourage interdistrict, regional, and statewide development of community college programs, facilities, and services.

(8) Facilitate articulation with other segments of higher education with secondary education.

(9) Review and approve comprehensive plans for each community college district. The plans shall be submitted to the board of governors by the governing board of each community college district.

(10) Review and approve all educational programs offered by community college districts and all courses that are not offered as part of an educational program approved by the board of governors.

(11) Exercise general supervision over the formation of new community college districts and the reorganization of existing community college districts, including the approval or disapproval of plans therefor.

(12) Notwithstanding any other law, be solely responsible for establishing, maintaining, revising, and updating, as necessary, the uniform budgeting and accounting structures and procedures for the California Community Colleges.

(13) Establish policies regarding interdistrict attendance of students.

(14) Advise and assist governing boards of community college districts on the implementation and interpretation of state and federal laws affecting community colleges.

(15) Contract for the procurement of goods and services, as necessary.

(16) Carry out other functions as expressly provided by law.

(c) Subject to, and in furtherance of, subdivision (a), the board of governors shall have full authority to adopt rules and regulations necessary and proper to execute the functions specified in this section as well as other functions that the board of governors is expressly authorized by statute to regulate.

(d) Wherever in this section or any other statute a power is vested in the board of governors, the board of governors, by a majority vote, may adopt a rule delegating that power to the chancellor, or any officer, employee, or committee of the California Community Colleges, or community college district, as the board of governors may designate. However, the board of governors shall not delegate any power that is expressly made nondelegable.
by statute. Any rule delegating power shall prescribe the limits of
delegation.
(e) In performing the functions specified in this section, the
board of governors shall establish and carry out a process for
consultation with institutional representatives of community college
districts so as to ensure their participation in the development and
review of policy proposals. The consultation process shall also
afford community college organizations, as well as interested
individuals and parties, an opportunity to review and comment on
proposed policy before it is adopted by the board of governors.
Access, Equity, and Success for All

Community College Funding Formula Principles

The CEO Funding Formula Workgroup was tasked by Chancellor Oakley with providing recommendations in response to the Governor’s January funding formula proposal. The Workgroup urges consideration of the following principles in the development of a new funding formula:

- Recognize the necessity of building institutional capacity to improve student outcomes by increasing community college base funding prior to implementation of a new funding formula;
- Integrate the enrollment and academic progress of economically disadvantaged populations with a formula that balances access, equity, and success for all students;
- Provide two years of program transition funding at a new, higher base level while the formula’s metrics are analyzed and refined to ensure their efficacy in advancing student equity, inclusion, and success;
- Adequately define equity metrics to most accurately represent all economically disadvantaged students (e.g. low income, CalWORKs, students with disabilities, foster youth, AB 540) and to identify their respective needs for Guided Pathways;
- Enhance funding predictability with a three-year average for base funding and by assigning Summer FTE to the fiscal year in which instruction was held;
- Progressively phase out transition funding to fully implement access, equity, and success metrics by 2025;
- Recognize the diversity of regional and local factors;
- Establish a funding formula oversight council to conduct annual analyses and to make recommendations for adjustments that advance equity-minded student success through improved fiscal stewardship.
CA LATINO LEGISLATIVE CAUCUS UNVEILS 2018 PRIORITY LEGISLATION
April 04, 2018

SACRAMENTO – Senator Ben Hueso (D-San Diego) and Assemblywoman Lorena González Fletcher, Chair and Vice Chair of the California Latino Legislative Caucus, today announced the Latino Caucus’ 2018 policy priorities and priority legislation.

“This year, more than ever, we are fighting hard to ensure all Californians have an opportunity to thrive and succeed,” said Senator Hueso. “While Washington DC is playing games with people’s lives and trying to take us backwards, in California we are working to improve educational opportunities, protect hard working and law-abiding immigrants, clean our air and water, increase access to quality health care and good paying jobs, protect our veterans and increase affordable housing. This year we have identified twenty bills as legislative priorities and we have updated our policy priorities to reflect the current state of affairs.”

“Our legislative focus this year is to protect the rights and improve the lives of all Californians and all California communities,” added Assemblywoman Gonzalez Fletcher. “The Latino Caucus is committed to policy priorities that make things better for all of us who live in this great state.”

Members voted to declare the following twenty bills as the Latino Caucus’ 2018 priority legislation:

- SB 946 (Lara) Safe Sidewalk Vending Act
- SB 974 (Lara) Health4All Adults
- SB 1108 (Hernandez) Protecting Access to Medi-Cal Coverage
- SB 1155 (Hueso) Language Accessibility in Courts
- AB 1037 (Limón) CA Dreamer Service Incentive Grant Program
- AB 1786 (Cervantes) Articulation Agreements for California Veterans
- AB 1862 (Santiago & Carrillo) Funding for TPS Immigration Services
- AB 1877 (Limón) Emergency Communication Translation
- AB 1885 (E. Garcia) CA Resident Worker Program & Economic Stabilization Act
- AB 1942 (Santiago) Earned Income Tax Credit
- AB 2015 (Reyes) Assisting Students with FAFSA and Dream Act Applications
- AB 2079 (Gonzalez Fletcher) Sexual Harassment Prevention for Janitorial Workers
- AB 2372 (Gloria) CA’s Sustainable and Affordable (CASA) Housing Act
- AB 2477 (Rubio & Low) Dream Resource Liaisons
- AB 2514 (Thurmond) Grant Program for Dual Language Instruction
- AB 2597 (Arambula) Programs in Medical Education (PRIME)
- AB 2772 (Medina) Ethnic Studies
- AB 2885 (Rodriguez) Zero Emission Vehicles Rebates in Disadvantaged Communities
- AB 2887 (Aguiar-Curry) Farmworker Housing Centers
- AB 3022 (Gonzalez Fletcher) Retroactive High School Diplomas for Deported Pupils
March 15, 2018
Sacramento – The California Legislative Black Caucus (CLBC) proudly announce its CLBC 2018 legislative and budget priorities.

“The needs, desires, and priorities of Black Californians are reflected in the legislation the Caucus is leading this year,” said CLBC Chair, Chris Holden (AD 41). “The CLBC is proclaiming victories in education, economic advancement, and overall quality of life. I am committed to the Caucus’ objectives of social, economic, and educational justice.”

“I am currently working on legislation to reverse the damaging effects of some of our state’s outdated, overly punitive, and ineffective sentencing laws, which have disproportionately impacted generations of African Americans,” said CLBC’s Second Vice Chair, Senator Steven Bradford (SD 35). “Similarly, it is a priority of mine to ensure that those returning to our communities are not set-up for failure and have a pathway to become contributing members of society,” continued Bradford. “As Californians have overwhelmingly voted to legalize the recreational use of cannabis, it is important to me that this burgeoning industry reflects the diversity of California, and in particular, includes those who have fallen victim to our nation’s failed war on drugs. I look forward to announcing legislation related to equity in the cannabis industry soon.”

“Our legislative priorities reinforce our belief that helping Blacks in California will undoubtedly end up helping all Californians,” added Assemblywoman Dr. Shirley Weber (AD 79), First Vice-Chair of the Caucus. “CLBC is committed to shaping our state’s public policy agenda for the betterment of everyone in our communities across the state.”

The legislative package includes Assembly Bill 2635 by Assemblymember Weber which adds African Americans to the local control funding formula (LCFF). By adding this subgroup to the LCFF, it is projected that $360 million will be redirected to schools that serve Black students. Adding this subgroup has a great budgetary demand which qualifies this bill for both budgetary and legislative priority. Members voted unanimously to champion the following bills and budget asks which make up the CLBC’s 2018 legislative package.

**Budget Priorities**

AB-2635 Weber: Education finance: local control funding formula: supplemental grants: lowest performing pupil subgroup or subgroups.

California African American Museum – $6,775,000; $6.45 Million (One Time), $325,000 (Ongoing)

**Legislative Priorities**

AB-2635 Weber: Education finance: local control funding formula: supplemental grants: lowest performing pupil subgroup or subgroups.

AB-2918 Holden: Vehicles: Driver’s Handbook

SB-982 Mitchell: CalWORKS Grants

**Endorsed Bills**

- AB-2289 Weber: Pupil Rights: Pregnant and Parenting Pupils
- AB-2550 Weber: CA Dignity Act
- AB-1940 McCarty: Parole: Reintegration Credits
- AB-1488 Thurmond: County Juvenile Transition Centers
• AB-1916 Cooper: Civil Service: Personnel Classification Plan: Salary Equalization
• AB-3046 Gipson: Foster care: rights
• AB-3115 Gipson: Prisoners: Civic Education
• AB-1892 Jones-Sawyer: CalFresh
• AB-3039 Holden: Occupational Licensing for the Previously Incarcerated
• AB-2747 Holden: College Athlete Protection
• AB-2444 Burke: Pupil Health: Eye and Vision Health
• ACR-177 Jones-Sawyer: Intergenerational Trauma: Epigenetics
• SB-439 Mitchell: Jurisdiction of Juvenile Court
API Legislative Caucus Policy Priorities 2018

The California Asian Pacific Islander (API) Legislative Caucus represents and advocates for the interests of the diverse Asian & Pacific Islander American (APIA) communities throughout California. Furthermore, it seeks to increase APIA participation and representation in all levels of government.

The API Legislative Caucus established the following policy priorities to address issues important to the Asian & Pacific Islander American community.

EDUCATION

SB 892 (Pan) – Lunar New Year
SB 892 establishes a formal statewide recognition for Lunar New Year by requiring the Governor to issue an annual proclamation.

Lunar New Year is celebrated by over 2.5 million Chinese, Korean and Vietnamese residents in California. The celebration of the Lunar New Year in communities throughout California illustrates the state’s rich cultural history and commitment to racial, religious and cultural diversity. SB 892 is a step forward in recognizing the importance of the contributions made by API communities.

AB 2291 (Chiu) – Campus Climate
AB 2291 requires schools to update school safety plans with information and training for educators to address discrimination and harassment.

Sikh and Muslim students indicate that they have experienced some form of bullying, intimidation, verbal or physical harassment at more than twice the rate of other students. Those surveyed often cited the lack of adequate response and training on the part of educators to address these issues. AB 2292 would ensure that teachers and other school employees are given the tools they need to adequately address bullying on school campuses.

AB 1248 (Gloria) – Cultural Diversity at Graduation Ceremonies
AB 1248 protects a pupil’s right to wear religious, ceremonial, or cultural adornments at a school graduation ceremony.

A cultural adornment is an accessory work to represent a spiritual, religious, or ceremonial tradition. However, some California students have been prevented from wearing cultural adornments at graduation ceremonies. California is a diverse state made brighter by the multitude of cultures and religious that composes it. AB 1248 ensures that a student’s right to celebrate their cultural or religious tradition is protected.
AB 2808 (Muratsuchi) – Increasing Local Control Funding Formula Targets
AB 2808 increases K-12 spending to ensure our schools receive the needed funding to promote student success.

Though K-12 public education has increased since the Great Recession, many school districts struggle to meet fixed cost. More than 12% of California’s students in public schools identify as Asian American or Pacific Islander. AB 2808 will assist API students to ensure they receive the resources to achieve education equity.

HEALTH AND MENTAL HEALTH

SB 968 (Pan) – Higher Education Mental Health Ratio
SB 968 requires the Trustees of the CSU, the governing board of each CA Community College district and the governing body of each independent institution of higher education that is a qualifying institution, and request the Regents of the UC, to hire one full-time equivalent mental health counselor per 1,000 students at each of their respective campuses to the fullest extent consistent with state and federal law.

Research has found that Asian American college students have higher rates of suicidal thoughts than their White peers. Among women aged 15-24, Asian Americans have a suicide death rate that is 30 percent higher than their White counterparts. SB 968 is an important measure to increase access to mental health services for a vulnerable population.

IMMIGRATION

AB 2477 (Rubio/Low)- DREAM Resource Liaison
AB 2477 requires the California Community Colleges and the California State Universities and requests the Universities of California to have a DREAM Resource Liaison on their campuses.

Having such liaisons on school campuses would allow all students to feel safe in their educational journeys and provide them resources in order to reach their full potential. Every year, about 65,000 undocumented students graduate from high schools in the United States. In 2016, the Pew Research Center and the Migration Policy Center reported that Asians are the fastest growing undocumented population, many of them college-aged. AB 2477 provides our undocumented students with the resources to feel safe in their place of education and to thrive.

LANGUAGE ACCESS

AB 1909 (Nazarian) – Threshold Language Translation for Providers of IHSS
AB 1909 requires the CA Department of Social Services to translate all written notices and web content intended for In Home Supportive Service (IHSS) providers into the state threshold languages: English, Spanish, Chinese and Armenian.

Statewide, 9,000 IHSS providers speak Chinese and almost 17,000 speak Armenian. Currently, approximately 40 percent of providers across the state receive program instructions, timesheets, tax notices, forms, and other important materials in a language they do not primarily read or speak. If a provider is unable to understand the already complicated IHSS rules, it may jeopardize their pay and, ultimately, their job. AB 1909 ensures that all IHSS providers would be able to access the necessary information they need to do their job in their primary language.

AB 2299 (Chu) – Ensuring Readability of Consumer Notices & Education Materials
AB 2299 ensures that materials sent to non-English speakers regarding Medi-Cal benefits are in their language and readable to eliminate language barriers to public programs.
Currently, the Department of Health Care Services (DHCS) requires Medi-Cal managed care plans to apply reading level and readability requirements to health education materials produced in English. However, Medi-Cal managed care plans do not apply the same reading level and readability requirements to all consumer materials or to materials translated into threshold languages. A significant number of Medi-Cal managed care plan members speak a language other than English as their primary language. In comparison with their English-speaking counterparts, Limited English Proficient (LEP) individuals are more likely to have low literacy levels and/or low health literacy. This may limit individuals’ ability to navigate a complex health system, which can lead to lower quality health care and poor healthcare outcomes. AB 2299 will improve access for all Medi-Cal recipients to ensure fair access to benefits.

PUBLIC SAFETY

AB 2034 (Kalra) – Human Trafficking Awareness Training: Transit Employees
AB 2034 requires transit employees in bus, train or light rail operations to undergo human trafficking awareness training by Jan 2020. Additionally requires Department of Justice to develop guidelines for transit operations to assist in their training.

California has the highest number of reported human trafficking cases in the country, and many human trafficking victims are hidden in plain sight along our state’s transportation routes. The bill is modeled after a successful program by the Santa Clara County Valley Transportation Authority (VTA) in collaboration with the South Bay Coalition to End Human Trafficking. In 2017, the Polaris hotline reported 23% of human trafficking survivors were API. AB 2034 equips transit operators and employees on the front-line of defense with the training to identify the signs of human trafficking. By doing so, suspected acts of human trafficking can be properly reported and, if needed, acted upon by law enforcement to prevent further harm to the victim.

SMALL BUSINESS

AB 2184 (Chiu) – Immigrant Business Inclusion Act
AB 2184 clarifies requirements for issuing business licenses to enhance entrepreneurship and reduce barriers to economic opportunity in California. Under the provisions of the bill, local governments would use Individual Taxpayer Identification Numbers as an alternative to Social Security Numbers on business permits for non-professional businesses.

In a state where 1 in 3 small business owners are immigrants, those without Social Security Numbers (SSN) could be prevented from applying from business licenses in more than 11 counties. California has led the nation in ensuring that immigrants are fully integrated into the economy and well-being of our state. Asian American immigration into the United States often surpasses the level of immigration for countries like Mexico, and AB 2184 is vital to ensure that residents have the means to succeed in California.

AB 2335 (Ting) – Corner Stores
AB 2335 requires the Department of Food and Agriculture to administer the Nutrition Incentive Matching Program and to award grants to the City of Los Angeles and the City and County of San Francisco to provide grant funds to small businesses and corner stores that are located in food deserts.

Food deserts are neighborhoods where residents have low access to supermarkets. Typically these neighborhoods are low-income urban areas, and residents have no choice, but to get their groceries from corner stores, many of which do not stock fresh produce. Many corner stores are small, locally-owned businesses that cannot afford to purchase additional refrigeration units. API
communities in food deserts are particularly vulnerable such as in LA’s Filipinotown where there are no supermarkets. AB 2335 would create the Nutrition Incentive Program which would provide grant incentives to corner stores and other small-scale stores with a limited selection of food products to purchase energy efficient refrigeration.

WORKER RIGHTS AND PROTECTION

AB 1761 (Muratsuchi) – Hotel Housekeeper Protection Act
AB 1761 protects hotel employees from violent and sexual assaults and harassment from hotel guests by requiring hotel employers to provide a panic button to their employees in order to summon assistance in an emergency situation. Hotel employees deserve to feel safe when they are doing their job, and hotel maids often work in dangerous situations that put them at risk of sexual assault or harassment.

Many APIs work in the hotel service industry as house keepers and maids. In fact, today Black, Latina and Asian women comprise 40 percent or more of the nation’s maids, nannies, and home health-care aides. AB 1761 will protect APIs in the hotel from sexual harassment and sexual assault.

AB 1913 (Kalra) – Foreign Labor Contractors
AB 193 requires all foreign labor contractors to register with the CA Labor Commissioner, not only those foreign labor contractors who recruit workers through the H-2B visa category. This is an important technical fix to SB 477 (Steinberg). This would apply important protections and remedies for those foreign workers solicited and recruited to work temporarily in CA to protect them from human trafficking and other labor code violations.

A 2017 report on Human Trafficking of Domestic Workers in the United States revealed that API women are especially at risk for human trafficking and exploitation. By covering all foreign labor contractors, AB 1913 will ensure that all foreign workers are protected against wage theft, human trafficking, and other worker abuses – abuses that impact many vulnerable API populations.

AB 2775 (Kalra) – Professional Cosmetics Ingredients Listing
AB 2775 establishes label parity with retail cosmetic products by requiring manufacturers of professional cosmetic products to label products with chemicals that pose a health risk.

This bill elevates the labeling standard of professional cosmetic products to that of retail cosmetic products. By requiring manufacturers to list ingredients on the labels of all professional cosmetic products, individuals and the beauty salon industry can take steps to avoid or limit exposure to hazardous chemicals. According to the Bureau of Labor Statistics, Vietnamese immigrants dominate the nail industry in California, leaving them disproportionately vulnerable to harmful substances in cosmetic products. AB 2775 will prevent the prevalence of adverse health impacts associated with these hazardous chemicals.

For questions about the API Legislative Caucus’ Budget and Legislative priorities, please contact Cat Nou, API Legislative Caucus Chief Consultant, at (916) 319-3686 or cat.nou@asm.ca.gov.
AB 310  (Medina D)  Part-time faculty office hours.
Introduced: 2/6/2017
Location: 1/29/2018-S. DESK
Summary: Would require each community college district to report, on or before August 15 of each year, the total part-time faculty office hours paid divided by the total part-time faculty office hours taught during the prior fiscal year and post this information on its Internet Web site. This bill contains other related provisions and other existing laws.

AB 809  (Quirk-Silva D)  Veterans: public postsecondary education: veterans’ priority registration for enrollment.
Introduced: 2/15/2017
Last Amend: 3/23/2017
Location: 1/29/2018-S. DESK
Summary: Current law also requires each community college district that administers a priority enrollment system to grant priority registration for enrollment to students in the California Community College Extended Opportunity Programs and Services and to disabled students, as defined. This bill would require that the priority registration for enrollment for members and former members of the Armed Forces of the United States and for members and former members of the State Military Reserve that is required by existing law, as described above, be applied notwithstanding any other law.

AB 1767  (Cervantes D)  California Kickstart My Future Loan Forgiveness Program.
Introduced: 1/4/2018
Last Amend: 2/22/2018
Summary: Would establish the California Kickstart My Future Loan Forgiveness Program, under the administration of the Student Aid Commission, to provide student loan forgiveness awards for the purpose of alleviating the burden of federal student loan debt for recent graduates meeting specified requirements. The bill would, subject to an available and sufficient appropriation, authorize an eligible applicant to receive a student loan forgiveness award equal to 100% of his or her monthly federal income-driven repayment plan payments for 24 months of repayment under the federal program.

AB 1803  (Choi R)  Postsecondary education: career placement and job search services for graduates.
Introduced: 1/10/2018
Location: 4/11/2018-A. APPR. SUSPENSE FILE
Summary: Would require a public or private institution of higher education that offers a baccalaureate degree program, provides career placement and job search services to students, and receives state funds for student financial assistance to provide career placement and job search services to a person for five years after the person receives a baccalaureate degree at the institution.

Introduced: 1/10/2018
Last Amend: 4/5/2018
Status: 4/9/2018-Re-referred to Com. on APPR.
Location: 4/5/2018-A. APPR.
Summary: Would require a community college to inform students of their rights to access transfer-level coursework and of the multiple measures placement policies developed by the community college, as provided. The bill would require a community college to annually report to the Office of the Chancellor of the California Community Colleges the community college's placement policies and placement results, and would require a community college to publicly post its placement results. The bill would require its provisions to be implemented by a specified date. To the extent the bill would impose additional duties on community college districts, the bill would impose a state-mandated local program.

AB 1858  (Calderon D)  Student financial aid: Financial Aid Shopping Sheet.
### AB 1887
**Public education governance: service on boards and commissions.**
- **Introduced:** 1/18/2018
- **Last Amend:** 3/15/2018
- **Status:** 3/19/2018-Re-referred to Com. on ED.
- **Location:** 3/15/2018- A. ED.
- **Summary:** Current law provides that a person is incapable of holding a civil office if, at the time of his or her election or appointment, he or she is not 18 years of age and a citizen of the state. This bill would authorize any pupil attending a California public secondary school who is under the age of 18 years to serve on any board or commission that includes members who are pupils or minors and is established under specified portions of the Education Code that relate to public elementary and secondary education and that includes members who are pupils or minors.

### AB 1895
**California DREAM Loan Program: repayment, deferment, and forbearance.**
- **Introduced:** 1/18/2018
- **Last Amend:** 3/15/2018
- **Status:** 3/19/2018-Re-referred to Com. on APPR.
- **Location:** 3/15/2018- A. APPR.
- **Summary:** The California DREAM Loan Program provides that a student attending a participating campus of the University of California or California State University may receive a loan, referred to as a DREAM loan, through the program if the student satisfies specified requirements, including a requirement that the student be exempt from paying nonresident tuition or meet equivalent requirements adopted by the Regents of the University of California. This bill would require a participating campus, on or before January 1, 2020, to adopt procedures allowing a borrower to select an income-based repayment plan for the repayment of a DREAM loan, as specified.

### AB 1935
**Community colleges: tutoring.**
- **Introduced:** 1/24/2018
- **Last Amend:** 4/5/2018
- **Status:** 4/9/2018-Re-referred to Com. on APPR.
- **Location:** 4/5/2018- A. APPR.
- **Summary:** Under current law, community college districts throughout the state have established campuses where they provide instruction to students. Current law establishes a system through which state funds are apportioned to community college districts based on specified formulas. A provision of existing law identifies the noncredit community college courses and classes that are eligible for state apportionment funding. This bill would provide that supervised tutoring for basic skills, and for degree-applicable and transfer-level courses, as authorized pursuant to regulations adopted by the board of governors by July 31, 2019, is eligible for state apportionment funding.

### AB 1936
**Postsecondary education: Office of Higher Education Performance and Accountability.**
- **Introduced:** 1/25/2018
- **Status:** 4/4/2018-In committee: Set, first hearing. Referred to APPR. suspense file.
- **Location:** 4/4/2018- A. APPR. SUSPENSE FILE
- **Summary:** Would establish the Office of Higher Education Performance and Accountability as the statewide postsecondary education coordination and planning entity. The bill would provide for the appointment by the Governor, subject to confirmation by a majority of the membership of the Senate, of an executive director of the office. The bill would establish an 8-member advisory board for the purpose of examining, and making recommendations to, the office regarding the functions and operations of the office and reviewing and commenting on any recommendations made by the office to the Governor and the Legislature, among other specified duties.

### AB 1961
**Postsecondary education: student housing and meal plans.**
- **Introduced:** 1/30/2018
- **Last Amend:** 3/15/2018
- **Status:** 3/19/2018-Re-referred to Com. on APPR.
- **Location:** 3/19/2018- A. APPR.
- **Summary:** Would require each institution of higher education receiving state funds for student financial assistance to, as a condition of receipt of the funds, separately list the cost of institutionally
operated housing and meal plans on all Internet Web sites and documents it provides to students for purposes of advertising or otherwise displaying the student costs associated with institutionally operated housing. The bill would prohibit each of these institutions, as a condition of receipt of the funds, from requiring a student to have a campus meal plan in order to live in institutionally operated housing.

**AB 2012** (Medina D) School and community college employees: parental leave.  
**Introduced:** 2/1/2018  
**Status:** 4/4/2018-From committee: Do pass and re-refer to Com. on ED. (Ayes 9. Noes 3.) (April 3). Re-referred to Com. on ED.  
**Location:** 4/3/2018-A. ED.  
**Summary:** Would require, regardless of the type of differential pay system used by a school district or community college district, a person employed in a position requiring certification qualifications and a person employed in an academic position to receive no less than 50% of his or her regular salary for the remaining portion of the 12-workweek period of parental leave. This bill contains other related provisions and other existing laws.

**AB 2049** (Gonzalez Fletcher D) Classified school and community college employees: payroll deductions for employee organization dues.  
**Introduced:** 2/6/2018  
**Last Amend:** 3/19/2018  
**Status:** 4/4/2018-From committee: Do pass and re-refer to Com. on HIGHER ED. (Ayes 5. Noes 0.) (April 4). Re-referred to Com. on HIGHER ED.  
**Location:** 4/4/2018-A. HIGHER ED.  
**Summary:** Would require the governing board of a school district, and the governing board of a community college district, when drawing an order for the salary or wage payment due to a classified employee of the school district or community college district to, without charge, reduce the order by the amount that it has been requested in a revocable written authorization by an employee who is a member of the bargaining unit to deduct for the payment of dues in, or for any other service provided by, any bona fide employee organization. The bill would require the revocability of one of these authorizations to be determined by its terms.

**AB 2081** (Melendez R) Postsecondary education: Campus Free Speech Act.  
**Introduced:** 2/7/2018  
**Status:** 4/3/2018-In committee: Set, first hearing. Failed passage.  
**Location:** 4/3/2018-A. HIGHER ED.  
**Summary:** Would establish the Campus Free Speech Act, which would, among other things, require the appropriate governing board or body of each higher education institution, as defined, to develop and adopt a policy on free expression that contains specified components. The act would require that the policy supersede any provisions in the policies and regulations of the institution that restrict speech on campus and are inconsistent with the policy, and would require the appropriate governing board or body of the institution to remove or revise the provisions to ensure compatibility with the policy.

**AB 2160** (Thurmond D) Classified employees: school and community college districts: part-time playground positions.  
**Introduced:** 2/12/2018  
**Status:** 4/4/2018-From committee: Do pass and re-refer to Com. on HIGHER ED. (Ayes 5. Noes 0.) (April 4). Re-referred to Com. on HIGHER ED.  
**Location:** 4/4/2018-A. HIGHER ED.  
**Summary:** In a community college district not incorporating the merit system, current law requires the governing board of the community college district to employ persons for positions that are not academic positions, which are known as the classified service. Current law, for purposes of this provision, exempts part-time playground positions from the classified service. This bill would delete the above-described provisions exempting part-time playground positions from the classified service, thereby making those positions part of the classified service.

**AB 2210** (McCarty D) Public postsecondary education: holders of certain special immigrant visas.  
**Introduced:** 2/12/2018  
**Last Amend:** 3/15/2018  
**Status:** 4/4/2018-From committee: Do pass and re-refer to Com. on APPR. (Ayes 13. Noes 0.) (April 3). Re-referred to Com. on APPR.  
**Location:** 4/3/2018-A. APPR.  
**Summary:** Current law exempts students who have been granted special immigrant visas pursuant to a specified federal statute, or are refugees admitted to the United States under a specified federal statute, and who, upon entering the United States, settled in California, from paying nonresident tuition at the California Community Colleges. Current law authorizes a community college district to report a student, who is exempt from nonresident tuition under this provision and who is enrolled as a
student of that district, as a full-time equivalent student for apportionment purposes. This bill would exempt students granted special immigrant visas pursuant to an additional federal statute from paying nonresident tuition at the California Community Colleges.

**AB 2220**  
(Bonta D) **College Student Athlete Bill of Rights.**  
**Introduced:** 2/12/2018  
**Last Amend:** 4/10/2018  
**Status:** 4/11/2018-Re-referred to Com. on HIGHER ED.  
**Location:** 4/4/2018-A. HIGHER ED.  
**Summary:** Would require all intercollegiate athletic programs at private postsecondary educational institutions, independent institutions of higher education, or campuses of the University of California or the California State University that provide athletic scholarships for college student athletes to comply with the prescribed requirements. The bill would rename the Student Athlete Bill of Rights as the College Student Athlete Bill of Rights and would redesignate “student athlete” as “college student athlete” for purposes of the College Student Athlete Bill of Rights. The bill would delete the provisions requiring an institution to exclusively use revenue from media rights for intercollegiate athletics to defray certain costs accrued under the College Student Athlete Bill of Rights.

**AB 2306**  
(Santiago D) **Student financial aid: Cal Grant Program.**  
**Introduced:** 2/13/2018  
**Status:** 4/4/2018-From committee: Do pass and re-refer to Com. on APPR. (Ayes 9. Noes 2.) (April 3). Re-referred to Com. on APPR.  
**Location:** 4/3/2018-A. APPR.  
**Summary:** The Cal Grant Program prohibits an applicant from receiving one or a combination of program awards in excess of the amount equivalent to the award level for a total of a 4-year period of full-time attendance in an undergraduate program, except as provided. This bill would increase this generally applicable maximum for total Cal Grant awards to a community college applicant to the award level for a 6-year period of full-time attendance. The bill would provide that this 6-year period of Cal Grant eligibility shall carry over to any 4-year qualifying institution if the applicant transfers from a community college to a 4-year qualifying institution, but shall not exceed the 6-year maximum in total.

**AB 2374**  
(Kiley R) **Postsecondary education: Free Speech on Campus Act of 2018.**  
**Introduced:** 2/14/2018  
**Last Amend:** 3/15/2018  
**Status:** 4/10/2018-From committee: Do pass and re-refer to Com. on APPR. with recommendation: To Consent Calendar. (Ayes 10. Noes 0.) (April 10). Re-referred to Com. on APPR.  
**Location:** 4/10/2018-A. APPR.  
**Summary:** Would require a campus of the California Community Colleges or the California State University, and would request a campus of the University of California, to make and disseminate a free speech statement that affirms the importance of, and the campus's commitment to promoting, freedom of expression. The bill would require those campuses to supplement that statement with educational programming, including, but not limited to, online resources. Because the bill would impose new duties on a campus of the California Community Colleges, the bill would impose a state-mandated local program.

**AB 2391**  
(Harper R) **Student health: identification cards: suicide prevention telephone numbers.**  
**Introduced:** 2/14/2018  
**Last Amend:** 4/5/2018  
**Status:** 4/9/2018-Read second time. Ordered to third reading.  
**Location:** 4/9/2018-A. THIRD READING  
**Summary:** Would, commencing July 1, 2019, require a campus of the California Community Colleges or the California State University that issues student identification cards to, and would request a campus of the University of California or an independent institution of higher education that issues student identification cards to, include on the back of the student identification cards the telephone numbers for the National Suicide Prevention Lifeline and Crisis Text Line, or a local suicide prevention lifeline and crisis text line that the campus deems appropriate, and the campus police or security telephone number or, if the campus does not have a campus police or security telephone number, the local nonemergency telephone number, as provided.

**AB 2477**  
(Rubio D) **Student support services: Dream Resource Liaisons.**  
**Introduced:** 2/14/2018  
**Status:** 4/4/2018-From committee: Do pass and re-refer to Com. on APPR. (Ayes 11. Noes 1.) (April 3). Re-referred to Com. on APPR.  
**Location:** 4/3/2018-A. APPR.  
**Summary:** Would, commencing with the 2019–20 academic year, require the California Community Colleges and the California State University, and request the University of California, to designate a Dream Resource Liaison on each of their respective campuses, as specified, to assist students meeting...
specified requirements, including undocumented students, by streamlining access to all available financial aid and academic opportunities for those students. By requiring community colleges to designate a Dream Resource Liaison, this bill would impose a state-mandated local program.

AB 2554  (Bonta D) Public postsecondary education: exemption from mandatory systemwide tuition and fees: surviving child or spouse of a federal firefighter.

Introduced: 2/15/2018
Last Amend: 3/12/2018
Status: 4/4/2018-From committee: Do pass and re-refer to Com. on APPR. (Ayes 13. Noes 0.) (April 3). Re-referred to Com. on APPR.
Location: 4/3/2018-A. APPR.
Summary: Current law prohibits the Board of Directors of the Hastings College of the Law, the Board of Governors of the California Community Colleges, the Trustees of the California State University, and, if they adopt an appropriate resolution, the Regents of the University of California, from collecting mandatory systemwide tuition and fees from any surviving spouse or surviving child of a deceased person who was a resident of the state and employed by or contracting with a public agency, whose principal duties consisted of active law enforcement service or active fire suppression and prevention, and who died as a result of his or her duties, as specified. This bill would specify that the surviving child or spouse of a firefighter employed by the federal government whose duty assignment involved the performance of firefighting services in this state would also be eligible for exemption from mandatory systemwide tuition and fees under the provision described above.

AB 2563  (Patterson R) Student financial aid: Cal Grant B and Cal Grant C awards: financial aid book advance program.

Introduced: 2/15/2018
Last Amend: 3/23/2018
Status: 4/4/2018-From committee: Do pass and re-refer to Com. on APPR. (Ayes 13. Noes 0.) (April 3). Re-referred to Com. on APPR.
Location: 4/3/2018-A. APPR.
Summary: Would, beginning with the 2019–20 academic year, require each Cal Grant participating institution, as a condition of its voluntary participation in the Cal Grant Program, to implement a financial aid book advance program that would provide a line of credit at the institution's campus bookstore to students receiving Cal Grant B, Cal Grant C, federal Pell Grant, or other financial aid dispersed to the student for educational expenses for the purchase of books and educational materials before the Cal Grant B or Cal Grant C funds are disbursed to the student.

AB 2722  (Medina D) Student financial aid: California Military Department GI Bill Award Program.

Introduced: 2/15/2018
Last Amend: 4/5/2018
Status: 4/9/2018-Re-referred to Com. on V.A.
Location: 4/3/2018-A. V. A.
Summary: Would change the name of the California National Guard Education Assistance Award Program to the California Military Department GI Bill Award Program. The bill would provide that the award could be used to obtain one baccalaureate, graduate, or doctoral degree if the person agrees to serve 2 years in the California National Guard or the California State Military Reserve, as specified. The bill would delete the obsolete provision requiring the submission of a report by the Legislative Analyst. The bill would also delete the provision rendering the program inoperative on July 1, 2019, and repealing the program on January 1, 2020, thereby extending the program indefinitely.

AB 2785  (Rubio D) Student services: lactation accommodations.

Introduced: 2/16/2018
Last Amend: 4/5/2018
Status: 4/9/2018-Re-referred to Com. on APPR.
Location: 4/3/2018-A. APPR.
Summary: Would require the California Community Colleges and the California State University to provide reasonable accommodations to a lactating student on their respective campuses to express breast milk, breast-feed an infant child, or address other needs related to breast-feeding. The bill would require that these reasonable accommodations include, but are not limited to, access to a private and secure room, other than a restroom, to express breast milk or breast-feed an infant child, permission to bring onto a school campus any equipment used to express breast milk, and access to a power source for that equipment.

AB 2804  (Waldron R) Substance use disorder treatment workforce expansion.

Introduced: 2/16/2018
Status: 4/4/2018-Coauthors revised. From committee: Do pass and re-refer to Com. on APPR. with recommendation: To Consent Calendar. (Ayes 15. Noes 0.) (April 3). Re-referred to Com. on APPR.
Location: 4/3/2018-A. APPR.
Summary: Would state the Legislature’s long-range goals through the creation of one-year and five-year plans to expand the substance use disorder treatment workforce in California to aid in the treatment of alcohol and drug abuse. The bill would set out one-year goals for school districts, the California State University system, the University of California, the community college system, and the State Department of Health Care Services.

**AB 2990** (Low D) Public postsecondary education: exemption from tuition and fees for qualifying survivors of deceased public safety and fire suppression personnel: notice.
- Introduced: 2/16/2018
- Last Amend: 4/5/2018
- Status: 4/9/2018-Re-referred to Com. on APPR.

Summary: Current law prohibits the Board of Directors of the Hastings College of the Law, the Board of Governors of the California Community Colleges, the Trustees of the California State University, and, if they adopt an appropriate resolution, the Regents of the University of California, from collecting mandatory systemwide tuition and fees from any surviving spouse or surviving child of a deceased person who was a resident of the state and employed by or contracting with a public agency, whose principal duties consisted of active law enforcement service or active fire suppression and prevention, and who died as a result of his or her duties, as specified. This bill would require the Hastings College of Law, each campus of the California Community Colleges, and the California State University that has an Internet Web site, to provide an online posting or notice of systemwide fee or tuition waivers available to students pursuant to the provision described above.

**SB 940** (Beall D) Student financial aid: Cal Grant Program: foster youth.
- Introduced: 1/29/2018
- Last Amend: 3/21/2018
- Location: 3/21/2018-S. APPR.

Summary: The Ortiz-Pacheco-Poochigian-Vasconcellos Cal Grant Program establishes the Cal Grant A and B Entitlement awards, the California Community College Transfer Entitlement awards, the Competitive Cal Grant A and B awards, the Cal Grant C awards, and the Cal Grant T awards under the administration of the Student Aid Commission, and establishes eligibility requirements for awards under these programs for participating students attending qualifying institutions. This bill would provide alternative deadlines for submitting a complete financial aid application for a student who is a current or former foster youth, who is attending a qualifying institution that offers baccalaureate degrees or is attending a California community college, and has not yet reached 26 years of age as of July 1 of the initial award year.

**SB 967** (Berryhill R) Public postsecondary education: waiver of mandatory systemwide tuition and fees: current or former foster youth.
- Introduced: 1/31/2018
- Last Amend: 3/8/2018
- Location: 4/11/2018-S. APPR.

Summary: The provisions of the Donahoe Higher Education Act apply to the University of California only to the extent that the Regents of the University of California, by appropriate resolution, make them applicable. The act prohibits campuses of those segments from charging mandatory systemwide tuition or fees to specified students who apply for a waiver. This bill would, in addition, prohibit those campuses from charging mandatory systemwide tuition or fees to current or former foster youth, who meet certain requirements, for a total of the equivalent of attendance in a 4-year undergraduate program.

**SB 972** (Portantino D) Pupil and student health: identification cards: suicide prevention hotline telephone number.
- Introduced: 2/1/2018
- Last Amend: 3/5/2018
- Status: 3/15/2018-Read second time. Ordered to third reading.
- Location: 3/15/2018-S. THIRD READING

Summary: Would require a public school, including a charter school, or a private school that serves pupils in any of grades 7 to 12, inclusive, that issues pupil identification cards to have printed on the back of the pupil identification cards the telephone number for a suicide prevention hotline or the Crisis Text Line, or both telephone numbers. The bill would require a public or private institution of higher education that issues student identification cards to have printed on the back of the student identification cards the telephone number for a suicide prevention hotline or the Crisis Text Line, or both telephone numbers.

**SB 1009** (Wilk R) Community colleges: tutoring.


**SB 1071** (Newman D) **Public postsecondary education: Chancellor of the California Community Colleges: uniform policy to award course credit for prior military education, training, and service.**

*Introduced: 2/12/2018*

*Last Amend: 3/22/2018*

*Status: 4/11/2018-Action From ED.: Do pass as amended.To APPR.*

*Location: 4/11/2018-S. APPR.*

*Summary: Would require, commencing January 1, 2019, the office of the Chancellor of the California Community Colleges, in collaboration with the Academic Senate for the California Community Colleges, to begin development of, and for each community college district to subsequently begin adoption and implementation of, a uniform policy to award military personnel and veterans with an official Joint Services Transcript, as specified. The bill would also require the office of the chancellor and the academic senate to review and adjust this uniform policy to align it with policies of other public postsecondary educational institutions.*

**SB 1224** (Glazer D) **Statewide longitudinal education and workforce data system.**

*Introduced: 2/15/2018*

*Last Amend: 3/19/2018*

*Status: 4/11/2018-Action From ED.: Do pass as amended.To APPR.*

*Location: 4/11/2018-S. APPR.*

*Summary: Would establish a statewide longitudinal education and workforce data system to include data on California students from enrollment in kindergarten to their entry into the workforce. The bill would require the State Department of Education, the Chancellor of the California Community Colleges, and the California State University, and would request the University of California, to set up a data collection system to track student data for these purposes, and would require the Labor and Workforce Development Agency to provide wage record and workforce program data for those students recently entering the workforce.*

**SB 1243** (Portantino D) **Public postsecondary education: The California State Pathways in Technology Program.**

*Introduced: 2/15/2018*

*Last Amend: 4/11/2018-Action From ED.: Do pass as amended.To APPR.*

*Location: 4/11/2018-S. APPR.*

*Summary: Would establish the California State Pathways in Technology (CA P-TECH) Program as a public-private partnership for purposes of preparing California students for high-skill jobs of the future in technology, manufacturing, health care, and finance. The bill would specify the core benefits of the program for participating students, including an opportunity to earn an Associate of Applied Science degree. The bill would express the intent of the Legislature that the CA P-TECH Program be funded through an appropriation in the annual Budget Act or in another statute.*

**SB 1348** (Pan D) **Postsecondary education: allied health professional clinical programs: reporting.**

*Introduced: 2/16/2018*

*Last Amend: 3/22/2018*

*Status: 4/9/2018-Set for hearing April 16.*

*Location: 4/4/2018-S. APPR.*

*Summary: Would require, beginning in 2019 and in each year thereafter, the Chancellor of the California Community Colleges to include in the annual report, for each community college program that offers certificates or degrees related to allied health professionals that require clinical training, specified information relating to clinical training for those certificates or degrees. The bill would require, beginning in 2019 and in each year thereafter, each private postsecondary institution with a program offering those certificates or degrees to include that same information in the School Performance Fact Sheet.*

**SB 1354** (Galgiani D) **Community colleges: California Apprenticeship Initiative (CAI) New and Innovative Grant Program.**
Introduced: 2/16/2018
Status: 4/6/2018-Set for hearing April 17.
Location: 4/4/2018-S. JUD.
Summary: Would enact the Campus Free Expression Act. The bill would declare that the outdoor areas of public postsecondary educational institutions are traditional public forums. The bill would provide that a public postsecondary educational institution may maintain and enforce reasonable time, place, and manner restrictions only when those restrictions are narrowly tailored in service of a significant institutional interest, employ clear, published, content-neutral, and viewpoint-neutral criteria, and provide for ample alternative means of expression.

SB 1388 (Anderson R)  Postsecondary education: Forming Open and Robust University Minds Act.
Introduced: 2/16/2018
Location: 4/4/2018-S. ED.
Summary: Would establish the Forming Open and Robust University Minds (FORUM) Act, which would require the Board of Governors of the California Community Colleges and the Trustees of the California State University to, and would encourage the Regents of the University of California to, develop and adopt a policy on free expression that contains specified statements.

SB 1406 (Hill D)  Public postsecondary education: community college districts: baccalaureate degree pilot program.
Introduced: 2/16/2018
Last Amend: 4/10/2018
Status: 4/10/2018-Read second time and amended. Re-referred to Com. on APPR.
Location: 4/10/2018-S. APPR.
Summary: Current law requires a student participating in a baccalaureate degree pilot program to complete his or her degree by the end of the 2022–23 academic year. Current law makes the authorization to establish pilot baccalaureate degree programs inoperative on July 1, 2023, and repeals the authorization on January 1, 2024. Would require that a student participating in a baccalaureate degree pilot program commence his or her degree program by the beginning of the 2022–23 academic year. This bill would extend the inoperative and repeal dates for the authorization to establish pilot baccalaureate degree programs by 3 years.

SB 1471 (Hernandez D)  Cal Grant Program: Competitive Cal Grant A and B awards.
Introduced: 2/16/2018
Location: 4/4/2018-S. APPR.
Summary: Would increase the annual Competitive Cal Grant A and B award limit from 25,750 to 30,000.

To Be Heard in Policy Committee

AB 1786 (Cervantes D)  Community colleges: academic credit for prior military experience.
Introduced: 1/8/2018
Last Amend: 3/20/2018
Location: 3/19/2018-A. HIGHER ED.
Summary: Current law requires the Chancellor of the California Community Colleges, using common course descriptors and pertinent recommendations of the American Council on Education, to determine, by July 1, 2015, for which courses credit should be awarded for prior military experience. This bill would instead require a statewide articulation officer at the Office of the Chancellor of the California Community Colleges, who would be designated by the chancellor under the bill’s provisions.
by March 31, 2019, to, using common course descriptors and pertinent recommendations of the American Council on Education, determine, by July 1, 2019, for which courses credit should be awarded for prior military experience.

**AB 1978 (Chávez R) Cal Grant Program.**
*Introduced: 1/31/2018*
*Status: 2/1/2018-From printer. May be heard in committee March 3.*
*Location: 1/31/2018-A. PRINT*
*Summary: Current law, the Ortiz-Pacheco-Poochigian-Vasconcellos Cal Grant Program (Cal Grant Program), establishes the Cal Grant A and B Entitlement Awards, the California Community College Transfer Entitlement Awards, the Competitive Cal Grant A and B Awards, the Cal Grant C Awards, and the Cal Grant T Awards under the administration of the Student Aid Commission, and establishes eligibility requirements for awards under these programs for participating students attending qualifying institutions. This bill would make a nonsubstantive change to the provision that establishes the Cal Grant Program.*

**AB 2015 (Reyes D) Pupil instruction: economics: completion of applications for student financial aid.**
*Introduced: 2/5/2018*
*Status: 2/12/2018-Referred to Com. on ED.*
*Location: 2/12/2018-A. ED.*
*Summary: Would require, commencing with the 2019–20 school year, the governing board of a school district or the governing body of a charter school that offers a course in economics that is limited to grade 12 pupils to include instruction, as part of that course, in the proper completion of student financial aid applications, including the Free Application for Federal Student Aid (FAFSA) and the California Dream Act Application. The bill would require the State Department of Education, before the commencement of the 2019–20 school year, to provide guidance on how to implement these provisions, including, but not necessarily limited to, who may provide instruction.*

**AB 2027 (Fong R) Career technical education.**
*Introduced: 2/5/2018*
*Status: 2/6/2018-From printer. May be heard in committee March 8.*
*Location: 2/5/2018-A. PRINT*
*Summary: Current law requires the Board of Governors of the California Community Colleges to collect and maintain information related to career technical education and technical training within the California Community Colleges for inclusion within the integrated statewide information system. With respect to this integrated statewide information system, current law specifies that its data gathering and analysis capabilities include maintaining a comprehensive inventory of all career technical education and technical training programs that are maintained by the public schools. This bill would make various nonsubstantive changes in these provisions.*

**AB 2070 (Reyes D) Postsecondary education: sexual assault and sexual violence prevention training: intimate partner and dating violence.**
*Introduced: 2/7/2018*
*Last Amend: 4/9/2018*
*Status: 4/10/2018-Re-referred to Com. on HIGHER ED.*
*Location: 3/22/2018-A. HIGHER ED.*
*Summary: Current law requires the governing boards of each community college district, the Trustees of the California State University, the Regents of the University of California, and the governing boards of independent postsecondary institutions, in order to receive state funds for student financial assistance, to adopt, among other things, detailed and victim-centered policies and protocols, and outreach programs, regarding sexual assault, domestic violence, dating violence, and stalking involving a student that comport with best practices and current professional standards, covering specified topics. This bill would provide that the outreach programming required by this provision would include informing students about specified topics relating to intimate partner and dating violence, as specified.*

**AB 2170 (Choi R) Veterans education and training: California State Approving Agency for Veterans Education.**
*Introduced: 2/12/2018*
*Location: 3/1/2018-A. HIGHER ED.*
*Summary: Would require the California State Approving Agency for Veterans Education for provide for the certification of nanodegree for completing certain vocational education programs in science, technology, engineering, and mathematics concentrations for veterans returning from military service on or after September 11, 2001, offered by California institutions of higher education as part of their participation in veterans education and training programs authorized by the federal Higher Education Act.*

**AB 2248 (McCarty D) Student financial aid: Cal Grant program.**
Introduced: 2/13/2018
Last Amend: 3/23/2018
Location: 3/1/2018-A. HIGHER ED.

Summary: Would, commencing with the start of the 2019–20 academic year, define “full time” for purposes of determining Cal Grant eligibility to mean 30 or more semester units or the equivalent, in an academic year for new awards and all subsequent renewals of that eligibility, and for all awards starting with the 2022–23 academic year. This bill would define “part time” to mean between 6 and below 30 semester units or the equivalent, for the academic year, in the above-described range of academic years, when at least 6 semester units, or the equivalent, are taken per semester. The definition of full time and part time for the enrollment status at a California community college would remain unchanged for the purposes of Cal Grant eligibility.

AB 2385 (Cunningham R) Public postsecondary education: textbooks.
Introduced: 2/14/2018
Last Amend: 3/15/2018
Status: 3/19/2018-Re-referred to Com. on HIGHER ED.
Location: 3/15/2018-A. HIGHER ED.

Summary: Current law urges textbook publishers to take specified actions aimed at informing students about, and reducing the amounts that students pay for, college textbooks. Among those actions, existing law urges textbook publishers to provide to faculty and departments considering textbook orders, and to post on their Internet Web sites, among other things, an explanation of how the newest edition is different from previous editions. This bill would instead urge textbook publishers to post in a prominent location on their Internet Web sites, among other things, a detailed description of how the newest edition differs from the previous edition, as specified.

AB 2478 (Voepel R) Personal income taxes: gross income: exclusion: student loan assistance.
Introduced: 2/14/2018
Status: 3/5/2018-Referred to Com. on REV. & TAX.
Location: 3/5/2018-A. REV. & TAX

Summary: The Personal Income Tax Law excludes from the gross income of an employee amounts paid or incurred by an employer for educational assistance to the employee, as specified, up to $5,250 during a calendar year. This bill would exclude from the gross income of an employee amounts, not exceeding an aggregate amount of $5,250 per year, that are paid or incurred by an employer for the payment of principal or interest on a qualified education loan, as defined, incurred by the employee.

AB 2479 (Voepel R) Public postsecondary education: income share agreement: pilot program.
Introduced: 2/14/2018
Last Amend: 3/8/2018
Status: 3/12/2018-Re-referred to Com. on HIGHER ED.
Location: 3/5/2018-A. HIGHER ED.

Summary: Would request the University of California and the California State University to each select a university of their respective system to establish, commencing with the 2020–21 academic year, a pilot program to waive the tuition for participating students who enter into an income share agreement with the university. The bill would require the income share agreement to be subject to specified requirements, including, among others, that the agreement provide for monthly payments to be based on a specified percentage of the student’s annual income for 10 years after graduation.

AB 2480 (Voepel R) Income taxes: credit: Scholarship Tax Credit Program Act.
Introduced: 2/14/2018
Last Amend: 3/19/2018
Status: 3/20/2018-Re-referred to Com. on REV. & TAX.
Location: 3/5/2018-A. REV. & TAX

Summary: The Personal Income Tax Law and the Corporation Tax Law allow various credits against the taxes imposed by those laws. This bill, for each taxable year beginning on or after January 1, 2019, would allow a credit in an amount equal to the total contributions made to a scholarship granting organization that provides scholarships to eligible students to cover all or part of the tuition and fees at a qualified school, as defined, during the taxable year, not to exceed a specified amount. The bill would impose specified duties on the Franchise Tax Board, the State Department of Education, and the Employment Development Department in administering the credits.

AB 2575 (Santiago D) High school and community college dual enrollment: College and Career Access Pathways partnerships: private schools.
Introduced: 2/15/2018
Last Amend: 4/5/2018
Status: 4/9/2018-Re-referred to Com. on HIGHER ED.
Location: 3/8/2018-A. HIGHER ED.
Summary: Current law authorizes the governing board of a community college district to enter into a College and Career Access Pathways (CCAP) partnership with the governing board of a school district with the goal of developing seamless pathways from high school to community college for career technical education or preparation for transfer, improving high school graduation rates, or helping high school pupils achieve college and career readiness. This bill would authorize the governing body of a private school, including a parochial school, to enter into a CCAP partnership agreement with the governing board of a community college district pursuant to these provisions.

**AB 2621** (Medina D) Postsecondary education: California Community Colleges.
Introduced: 2/15/2018
Last Amend: 4/3/2018
Status: 4/4/2018-Re-referred to Com. on HIGHER ED.
Location: 4/2/2018-A. HIGHER ED.
Summary: Current law establishes the California Community Colleges, under the administration of the Board of Governors of the California Community Colleges, as one of the segments of public postsecondary education in this state. Current law establishes community college districts throughout the state, and authorizes them to provide instruction at the campuses they operate. This bill would require the Legislative Analyst’s Office to conduct a study on the feasibility of creating an exclusively online community college and to report its findings to the Legislature on or before July 1, 2019.

**AB 2716** (Nazarian D) Postsecondary education: Every Kid Counts Act.
Introducted: 2/15/2018
Status: 2/16/2018-From printer. May be heard in committee March 18.
Location: 2/15/2018-A. PRINT
Summary: Current law establishes the Every Kid Counts (EKC) Act, which requires the Scholarshare Investment Board to implement and administer a college savings program that incentivizes families to participate in a qualified tuition program established under the Golden State Scholarshare Trust Act or other college savings programs. This bill would make a nonsubstantive change to those provisions.

**AB 2747** (Holden D) Student Athletes Bill of Rights: student athlete liaisons: collegiate athlete mandated reporters.
Introducted: 2/16/2018
Last Amend: 4/9/2018
Status: 4/10/2018-Re-referred to Com. on HIGHER ED.
Location: 3/22/2018-A. HIGHER ED.
Summary: Would add to the Student Athlete Bill of Rights provisions declaring that college athletes have the right to self-organization and requiring institutions of higher education, as defined, to provide student athletes with designated information. This bill contains other related provisions and other existing laws.

**AB 2767** (Medina D) California Community Colleges: funding formula: study.
Introducted: 2/16/2018
Last Amend: 4/3/2018
Status: 4/4/2018-Re-referred to Com. on HIGHER ED.
Location: 4/2/2018-A. HIGHER ED.
Summary: Current law authorizes the establishment of community college districts under the administration of community college governing boards, and authorizes these districts to provide instruction at community college campuses throughout the state. Current law requires the board of governors to develop criteria and standards, in accordance with specified statewide minimum requirements, for the purposes of making the annual budget request for the California Community Colleges to the Governor and the Legislature, and allocating state general apportionment revenues. This bill would require the Legislative Analyst’s Office to conduct a study of the funding formula used to allocate state apportionments by the California Community Colleges for the 2017–18 fiscal year.

**AB 2776** (Salas D) Workforce development: workforce diploma program: California Community Colleges.
Introducted: 2/16/2018
Last Amend: 3/23/2018
Status: 4/2/2018-Re-referred to Com. on HIGHER ED.
Location: 3/15/2018-A. HIGHER ED.
Summary: Would establish a workforce diploma program under the administration of the California Community Colleges. The program would consist of components that would include career diplomas, standard diplomas, pay-for-performance programs, and the use of approved providers who provide designated services to increase the employability of program participants. The bill would provide for an online component of the workforce diploma program. The bill would express the intent of the Legislature to provide $5,000,000 of funding, as specified, to the Chancellor’s Office of the California Community Colleges through the annual Budget Act or another statute, to fund a 2-year pilot
workforce diploma program.

**AB 2871** (Garcia, Eduardo D)  
**Public schools: College and Career Access Pathways partnerships.**

*Introduced:* 2/16/2018  
*Last Amend:* 4/2/2018  
*Status:* 4/3/2018-Re-referred to Com. on HIGHER ED.  
*Location:* 3/8/2018-A. HIGHER ED.  
*Summary:* Would establish the Rural Dual Enrollment Teacher Qualifications Pilot Program. Commencing with the 2019–20 school year, the bill would authorize a high school district within Imperial County to allow a high school teacher of that district to teach a college course on the high school campus pursuant to a College and Career Access Pathways (CCAP) partnership if the teacher has met specified requirements. The bill would require any course taught by a qualified high school teacher under the bill to be evaluated and approved by the community college, and would only allow pupils enrolled through a CCAP partnership to enroll in these courses.

**AB 2891** (Holden D)  
**High school and community college dual enrollment: College and Career Access Pathways partnerships: charter schools.**

*Introduced:* 2/16/2018  
*Last Amend:* 3/19/2018  
*Status:* 3/20/2018-Re-referred to Com. on HIGHER ED.  
*Location:* 3/8/2018-A. HIGHER ED.  
*Summary:* Would authorize the governing body of a charter school to enter into a CCAP partnership agreement with the governing board of a community college district pursuant to these provisions.

**AB 2894** (Gloria D)  
**Postsecondary education: students called to active military duty during an academic term.**

*Introduced:* 2/16/2018  
*Last Amend:* 3/23/2018  
*Status:* 4/2/2018-Re-referred to Com. on HIGHER ED.  
*Location:* 3/22/2018-A. HIGHER ED.  
*Summary:* Current law requires public and private postsecondary educational institutions to refund 100% of the tuition and fees paid by a student to the institution for the academic term in which the student was required to report for military service. This bill would provide that, when a student, as defined, is called to active military duty during an academic term, the student may: choose to withdraw from the institution, retroactive to the beginning of the academic term; if at least 75% of the term has been completed, choose to request that the faculty member assign a grade for the course based on the work the student has completed, as specified; or, if the faculty member assigns a grade of Incomplete for the student’s coursework, the student has a minimum of 2 weeks after returning to the institution to complete the course requirements.

**AB 2993** (Baker R)  
**Community colleges: Community College Completion Grant Program.**

*Introduced:* 2/16/2018  
*Status:* 2/17/2018-From printer. May be heard in committee March 19.  
*Location:* 2/16/2018-A. PRINT  
*Summary:* Current law establishes the California Community Colleges, under the administration of the Board of Governors of the California Community Colleges, as one of the segments of public postsecondary education in this state. The board of governors appoints a chief executive officer known as the Chancellor of the California Community Colleges. This bill would change the deadline for submission of that report to April 15, 2019. This bill contains other current laws.

**AB 3060** (Bonta D)  
**Income and corporation taxes: deductions: educational assistance.**

*Introduced:* 2/16/2018  
*Last Amend:* 3/22/2018  
*Status:* 4/2/2018-Re-referred to Com. on REV. & TAX.  
*Location:* 3/22/2018-A. REV. & TAX  
*Summary:* Would allow a deduction under the Personal Income Tax Law and the Corporation Tax Law for amounts paid or incurred by an employer during the taxable year for the educational assistance of full-time employees pursuant to an educational assistance program. This bill would take effect immediately as a tax levy.

**AB 3071** (Nazarian D)  
**Community colleges: community service classes.**

*Introduced:* 2/16/2018  
*Status:* 2/17/2018-From printer. May be heard in committee March 19.  
*Location:* 2/16/2018-A. PRINT  
*Summary:* Current law establishes community college districts throughout the state, and authorizes them to provide instruction at the campuses they operate. Current law authorizes the governing board of any community college district to establish and maintain, in accordance with specified criteria,
community service classes in civic, vocational, literacy, health, homemaking, technical, and general education, including, but not limited to, classes in the fields of visual and performing arts, handicraft, science, literature, nature study, nature contacting, aquatic sports, and athletics. This bill would make nonsubstantive changes in this provision.

AB 3089 (Thurmond D)  **Student financial aid: Chafee grant awards.**
Introduced: 2/16/2018
Last Amend: 4/2/2018
Status: 4/3/2018-Referred to Com. on HIGHER ED.
Location: 3/19/2018-A. HIGHER ED.
Summary: Commencing with the 2019–20 award year, this bill would provide that new Chafee grant awards may be available to students as long as they are under the age of 28 by December 31 of the award year. The bill would appropriate an additional $250,000 from the General Fund annually to expand the state’s allocation to the Chafee Educational and Training Vouchers program. The bill would require the commission to annually report to the Legislature specified information regarding Chafee grant awards for the preceding award year.

AB 3101 (Carrillo D)  **Community colleges.**
Introduced: 2/16/2018
Status: 3/12/2018-Referred to Com. on HIGHER ED.
Location: 3/12/2018-A. HIGHER ED.
Summary: Would require the Board of Governors of the California Community Colleges, on or before July 31, 2019, to revise the CCCApply application and enrollment process so that only data that is required by the federal government, or that is otherwise necessary, as determined by the board, is collected during the process. The bill would require the board, to the extent that data can be collected from the student at a later time, to delay the collection of that data until after the student is enrolled.

AB 3153 (Levine D)  **Student financial aid: Cal Grants: summer term students.**
Introduced: 2/16/2018
Last Amend: 3/23/2018
Status: 4/2/2018-Referred to Com. on HIGHER ED.
Location: 3/22/2018-A. HIGHER ED.
Summary: Would require that a student’s attendance in the equivalent of 2 summer sessions or terms of full-time attendance be included in the 4 years of full-time attendance in an undergraduate program for which a student may receive a Cal Grant Program award.

AB 3186 (Medina D)  **Public postsecondary education: University of California: California Community Colleges: competitive bidding: best value.**
Introduced: 2/16/2018
Location: 3/12/2018-A. HIGHER ED.
Summary: Current law requires the governing board of any community college district to let specified contracts involving an expenditure of more than $50,000 to the lowest responsible bidder meeting certain specifications, or else reject all bids. Existing law, until January 1, 2019, provides that the bid evaluation and selection for these contracts may be determined by the best value for the University of California or the community college district, as specified. This bill would delete the January 1, 2019, repeal date applicable to best value procurement authority, thereby extending operation of these provisions indefinitely and would delete the references to the reports described above regarding use of best value procurement by the University of California and community college districts.

AB 3255 (Committee on Higher Education)  **Postsecondary education: omnibus bill.**
Introduced: 3/15/2018
Status: 3/22/2018-Refereed to Com. on HIGHER ED.
Location: 3/22/2018-A. HIGHER ED.
Summary: Current law requires the Commission on Teacher Credentialing to maintain for public record certain enumerated information and authorizes the commission to disclose that information. Current law generally prohibits the disclosure by the commission of information absent an order from a court of competent jurisdiction. This bill would, for purposes of the ongoing evaluation of teacher preparation programs at the California State University, authorize the commission to provide to the Office of the Chancellor of the California State University or the State Department of Education any data it collects to the extent that the disclosure is permitted by state and federal privacy laws.

SB 968 (Pan D)  **Postsecondary education: mental health counselors.**
Introduced: 1/31/2018
Last Amend: 3/12/2018
Location: 2/8/2018-S. ED.
Summary: Would require the Trustees of the California State University, and the governing board of each community college district, and request the Regents of the University of California, to have one full-time equivalent mental health counselor per 1,000 students enrolled at each of their respective campuses to the fullest extent consistent with state and federal law. The bill would define mental health counselor for purposes of this provision. The bill would require those institutions, on or before January 1, 2020, and every 3 years thereafter, to report to the Legislature how funding was spent and the number of mental health counselors employed on each of its campuses, as specified.

SB 1218 (Gaines R) Personal income taxes: deduction: 529 college savings plans: contributions.
Introduced: 2/15/2018
Status: 3/1/2018-Referred to Com. on GOV. & F.
Location: 3/1/2018-S. GOV. & F.
Summary: For taxable years beginning on or after January 1, 2018, would allow as a deduction under that law the lesser of (1) the amount contributed by a qualified taxpayer, as defined, to a qualified tuition program, as specified, or (2) $20,000, as indexed for inflation. This bill contains other related provisions.

SB 1378 (Nguyen R) Postsecondary education: segments.
Introduced: 2/16/2018
Status: 3/8/2018-Referred to Com. on RLS.
Location: 2/16/2018-S. RLS.
Summary: Would make nonsubstantive changes in a provision that, for purposes of the Donahoe Higher Education Act, designates the segments of public postsecondary education as the California Community Colleges, the California State University, and the University of California, as specified, and defines independent institutions of higher education for these purposes.

SB 1432 (Fuller R) School districts and community college districts: election procedures.
Introduced: 2/16/2018
Status: 3/8/2018-Referred to Com. on RLS.
Location: 2/16/2018-S. RLS.
Summary: Current law prescribes the procedures for the election of governing board members in a school district or community college district. Current law requires that any election held for the purpose of electing governing board members of any school district or community college district be held and conducted in accordance with uniform procedures, as provided. This bill would make nonsubstantive changes to the latter provision.

SB 1470 (Stern D) Jobs for California Graduates Program.
Introduced: 2/16/2018
Summary: Current law establishes the Jobs for California Graduates Program for the purpose of creating a regional system of local programs to help California’s at-risk youth complete their secondary education and transition into the workforce or enroll in postsecondary education. As part of this program, current law authorizes the Director of Employment Development to make grants to applicants for the purposes of carrying out Jobs for California Graduates local programs in the central valley region and requires these local programs to include certain elements. This bill would additionally require local programs to consult with local workforce development boards on efforts where they can cooperate.

SB 1472 (Hernandez D) Student financial aid: Competitive Cal Grant A and B awards.
Introduced: 2/16/2018
Status: 3/8/2018-Referred to Com. on RLS.
Location: 2/16/2018-S. RLS.
Summary: Would update a cross reference to the total number of Competitive Cal Grant A and B awards granted annually.

Total Measures: 74
Total Tracking Forms: 74
**AB 1862** (Santiago D) *Immigration services: grants.*

*Introduced:* 1/11/2018  
*Location:* 4/11/2018-A. APPR.  
*Summary:* The TPS program authorizes eligible nationals from TPS designated foreign countries to remain in the United States on a temporary and renewable basis. This bill would appropriate $10,000,000 from the General Fund to the department for the 2017–18 fiscal year for immigration services funding to be available for payment to existing entities under contract pursuant to specified provisions as described for work on behalf of clients who are current or former recipients of federal Temporary Protected Status.  
*Vote Events:*  
04/10/2018 ASM. HUM. S. (Y:6 N:0 A:1) (P)  
03/20/2018 ASM. JUD. (Y:8 N:1 A:1) (P)

**AB 1895** (Calderon D) *California DREAM Loan Program: repayment, deferment, and forbearance.*

*Introduced:* 1/18/2018  
*Status:* 3/19/2018-Re-referred to Com. on APPR.  
*Location:* 3/15/2018-A. APPR.  
*Summary:* The California DREAM Loan Program provides that a student attending a participating campus of the University of California or California State University may receive a loan, referred to as a DREAM loan, through the program if the student satisfies specified requirements, including a requirement that the student be exempt from paying nonresident tuition or meet equivalent requirements adopted by the Regents of the University of California. This bill would require a participating campus, on or before January 1, 2020, to adopt procedures allowing a borrower to select an income-based repayment plan for the repayment of a DREAM loan, as specified.  
*Vote Events:*  
03/13/2018 ASM. HIGHER ED. (Y:11 N:0 A:2) (P)

**AB 2015** (Reyes D) *Pupil instruction: economics: completion of applications for student financial aid.*

*Introduced:* 2/5/2018  
*Status:* 2/12/2018-Referred to Com. on ED.  
*Location:* 2/12/2018-A. ED.  
*Summary:* Would require, commencing with the 2019–20 school year, the governing board of a school district or the governing body of a charter school that offers a course in economics that is limited to grade 12 pupils to include instruction, as part of that course, in the proper completion of student financial aid applications, including the Free Application for Federal Student Aid (FAFSA) and the California Dream Act Application. The bill would require the State Department of Education, before the commencement of the 2019–20 school year, to provide guidance on how to implement these provisions, including, but not necessarily limited to, who may provide instruction.

**AB 2210** (McCarty D) *Public postsecondary education: holders of certain special immigrant visas.*

*Introduced:* 2/12/2018  
*Status:* 4/4/2018-From committee: Do pass and re-refer to Com. on APPR. (Ayes 13. Noes 0.) (April 3). Re-referred to Com. on APPR.  
*Location:* 4/3/2018-A. APPR.  
*Summary:* Current law exempts students who have been granted special immigrant visas pursuant to a specified federal statute, or are refugees admitted to the United States under a specified federal statute, and who, upon entering the United States, settled in California, from paying nonresident tuition at the California Community Colleges. Current law authorizes a community college district to report a student, who is exempt from nonresident tuition under this provision and who is enrolled as a student of that district, as a full-time equivalent student for apportionment purposes. This bill would exempt students granted special immigrant visas pursuant to an additional federal statute from paying nonresident tuition at the California Community Colleges.  
*Vote Events:*  
04/03/2018 ASM. HIGHER ED. (Y:13 N:0 A:0) (P)

**AB 2477** (Rubio D) *Student support services: Dream Resource Liaisons.*

*Introduced:* 2/14/2018  
*Status:* 4/4/2018-From committee: Do pass and re-refer to Com. on APPR. (Ayes 11. Noes 1.) (April 3). Re-referred to Com. on APPR.  
*Location:* 4/3/2018-A. APPR.  
*Summary:* Would, commencing with the 2019–20 academic year, require the California Community
Colleges and the California State University, and request the University of California, to designate a Dream Resource Liaison on each of their respective campuses, as specified, to assist students meeting specified requirements, including undocumented students, by streamlining access to all available financial aid and academic opportunities for those students. By requiring community colleges to designate a Dream Resource Liaison, this bill would impose a state-mandated local program.

**Vote Events:**
04/03/2018 ASM. HIGHER ED. (Y:11 N:1 A:1) (P)

**AB 2931**  
(Patterson R) Law enforcement: cooperation with immigration officials.  
**Introduced:** 2/16/2018  
**Status:** 4/10/2018-In committee: Set, first hearing. Failed passage. Reconsideration granted.  
**Location:** 4/10/2018-A. PUB. S.  
**Summary:** Current law authorizes a local law enforcement agency to cooperate with federal immigration authorities regarding an individual under certain circumstances, including if the individual has been previously convicted of certain crimes or if the individual is arrested and brought before a magistrate on a charge involving a serious or violent felony, as defined, or a felony that is punishable by imprisonment in the state prison, and a magistrate makes a specified finding of probable cause to a complaint based on that charge. This bill would add additional qualifying convictions that would authorize local law enforcement to cooperate with federal immigration authorities regarding the individual.  

**Vote Events:**
04/10/2018 ASM. PUB. S. (Y:7 N:0 A:0) (P)  
04/10/2018 ASM. PUB. S. (Y:2 N:5 A:0) (F)

**AB 3008**  
(Burke D) Public postsecondary education: exemption from paying nonresident tuition.  
**Introduced:** 2/16/2018  
**Status:** 4/10/2018-Re-referred to Com. on HIGHER ED.  
**Location:** 3/12/2018-A. HIGHER ED.  
**Summary:** Current law exempts a student, other than a nonimmigrant alien, as defined, from nonresident tuition at the California State University and the California Community Colleges if the student has a total of 3 or more years of attendance, or attainment of equivalent credits earned while in California, at California high schools, California adult schools, campuses of the California Community Colleges, or a combination of those schools, as specified, or if the student completes 3 or more years of full-time high school coursework, and a total of 3 or more years of attendance in California elementary schools, California secondary schools, or a combination of California elementary and secondary schools. Notwithstanding the exclusion of nonimmigrant aliens from the exemption from paying nonresident tuition, the bill would provide that any student enrolled at the California State University or the California Community Colleges shall remain eligible for the exemption from nonresident tuition if the nonimmigrant alien met the requirements for the exemption from nonresident tuition as a dependent of an individual with an E-2 nonimmigrant classification as long as the student remains continuously enrolled, irrespective of any change in the student's visa or immigration status.

**SB 1219**  
(Gaines R) Law enforcement: sharing data.  
**Introduced:** 2/15/2018  
**Status:** 4/3/2018-Set for hearing April 17.  
**Location:** 3/1/2018-S. PUB. S.  
**Summary:** The California Values Act (act), prohibits, subject to exceptions, state and local law enforcement agencies, including school police and security departments, from using money or personnel to investigate, interrogate, detain, detect, or arrest persons for immigration enforcement purposes, as specified, and, subject to exceptions, proscribes other activities or conduct in connection with immigration enforcement by law enforcement agencies. This bill would repeal those provisions. This bill contains other related provisions and other existing laws.

**Total Measures:** 8  
**Total Tracking Forms:** 8