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January 22, 2018

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California State University Report: Preliminary Institutional Financial Aid Programs

As required by Section 66021.1 of the Education Code, enclosed is the California State University's (CSU) Preliminary Institutional Financial Aid Report for the 2016/17 academic year.

As CSU has consistently reported over the years, we have found that more than half of CSU's students will graduate without any education loan debt. Of those that did incur debt, the average debt load was lower than the California and national averages. Specifically, some of the highlights on CSU financial aid report includes:

- In 2016-17 80% of all CSU students (379,000+) received over \$4.2 Billion in total financial assistance.
- 77% of undergraduate financial aid recipients have their tuition fees fully covered by State University Grants, Cal Grants or waivers.

CSU Campuses
Bakersfield
Channel Islands
Chico
Dominguez Hills
East Bay

Fresno
Fullerton
Humboldt
Long Beach
Los Angeles
Maritime Academy

Monterey Bay
Northridge
Pomona
Sacramento
San Bernardino
San Diego

San Francisco
San José
San Luis Obispo
San Marcos
Sonoma
Stanislaus

Institutional Aid Preliminary Report

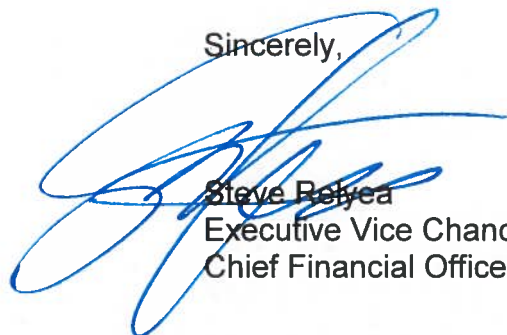
January 17, 2018

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- More than half (51 percent) of CSU baccalaureate recipients graduated with zero education loan debt.
- Of the 49 percent who graduated with debt, the average loan debt of \$16,617 is lower than the California average of \$22,744.
- State mandated fee waivers represent over \$51 Million in foregone revenue to CSU campuses.

If you have any questions about this report, please contact Mr. Dean Kulju, Director, Student Financial Aid Services and Programs at (562) 951-4737.

Sincerely,



Steve Relyea
Executive Vice Chancellor and
Chief Financial Officer

SR:skg

Full report posted to www.calstate.edu/budget/fybudget/legislative-reports/

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INSTITUTIONAL FINANCIAL AID PROGRAMS AT THE CALIFORNIA STATE UNIVERSITY

Section 66021.1 of the California Education Code directs the California State University to report annually to the Legislature on its institutional financial aid programs including a preliminary and final report. This preliminary report is provided in response to the request, which reads as follows:

66021.1 (b) The California State University shall, and the University of California is requested to, report annually to the Legislature on their respective institutional financial aid programs. The California State University shall, and the University of California is requested, to provide preliminary reports on or before January 10 of each year, and the final reports on or before March 31 of each year.

(c) The preliminary reports shall include all of the following:

(1) A description of the goals, terms, and policies of each of the university's institutional aid programs, including eligibility criteria, allocation of financial aid awards, fee waivers, and other relevant information.

(2) A description and explanation of any changes the university has made to any of these policies since the prior year, and any changes the university intends to make for the next academic year.

(3) The total amount the university expended on institutional aid for students, disaggregated by student level, for the two prior academic years, the current year, and a projection for the next year, and the average and 90th percentile undergraduate institutional aid award amount provided per recipient for the prior two academic years and the current academic year.

(4) The average and 90th percentile parental income level, expected family contribution, and the financial need of undergraduate need-based student institutional gift aid recipients for the prior two academic years.

(5) For the prior year, the current year, and the budget year, and an analysis identifying the estimated number of undergraduates with financial need; their aggregate cost of attendance and aggregate expected federal parent contribution; the aggregate amount of financial aid, including federal gift aid, state gift aid, institutional need-based aid, institutional merit-based aid, other institutional gift aid, and private gift aid, received by these students; the aggregate remaining amount to be met by work, borrowing, or other means; and an explanation of the estimated change in aggregate student need in the budget year resulting from changes in the cost of attendance, and other factors, including any fee increases proposed by the university in its fall budget proposal. The explanation shall include an estimate of the extent to which cost increases will be offset by federal, state, and institutional financial aid programs.

(6) The typical financial aid package for a typical dependent undergraduate student with a parent income of twenty thousand dollars (\$20,000), forty thousand dollars (\$40,000), sixty thousand dollars (\$60,000), eighty thousand dollars (\$80,000), and one hundred thousand dollars (\$100,000).

(d) The final report shall include all of the following for the prior academic year:

(1) An aggregate summary of financial aid awarded to students, including scholarships, grants, waivers, loans, and work-study awards from federal, state, institutional, and private sources.

(2) Indicators of effectiveness of university's aid programs in achieving the university stated goals related to financial aid.

Financial Aid Reports

In addition to this report, the University produces a variety of ad hoc reports, which contain a variety of information including student costs, trends, and historical data. Information regarding fees and financial aid is provided to the Board of Trustees throughout the year as part of finance and budget presentations and discussions.

Overview of Institutional Aid Programs

Historically, California has made a strong commitment to provide access to public postsecondary institutions while making it a priority to keep fees low at these institutions. Up until the Educational Opportunity Program was introduced in 1969 the availability of federal student aid programs, along with the state's scholarship program, precluded the apparent need for any system wide financial aid program at the CSU. The Program was introduced in order to promote expanded educational opportunities for low-income disadvantaged students. With its success, public institutions have continued to see more individuals afforded the ability to go to college, despite increases in the cost of attendance for postsecondary education. As such, the CSU and other higher education institutions have employed efforts to ensure that financial aid is available to assist students in meeting their costs to pursue their college degrees and overcome financial barriers. *See Table 1.1 Institutional Aid Expenditures on page 9 of this report.*

Goals for Institutional Aid Programs

Institutional aid programs contribute to a robust assortment of federal and state programs that make it possible to address the financial needs of CSU students. The CSU Board of Trustees adopted a fee and financial aid policy in 1993 with the goal to cover the State University Fee for financially needy students. In response to Trustee policy, to the maximum extent possible, the CSU offsets the tuition for low and middle-income students utilizing the State University Grant and Cal Grant programs to promote access and ensure affordability for students with the least ability to pay. While not all CSU students may be eligible for grants, campuses construct financial aid packages with work study and loans after grants to minimize student indebtedness.

State University Grants (SUG)

The State University Grant (SUG) program was established for the 1982-83 award year with a General Fund appropriation of \$3.4 million. Due to fiscal considerations, General Fund support for the SUG program leveled off at \$33.7 million in 1992-93. Absent an increase in state support for the SUG program, in March 1993, the CSU Board of Trustees approved the framework for a new student fee and financial aid policy that called for dedicating one-third of new revenues due to tuition rate increases to the State University Grant program. The CSU commitment to this program for 2017-2018 is nearly \$701 million. The SUG program provides need-based grants to eligible California residents and Dream applicants who enroll at CSU campuses in undergraduate, post-baccalaureate, and graduate programs. Need is based on expected family contribution (EFC) which cannot exceed one half of the campus standard cost of attendance for students living off-campus. The awarding criteria may vary across campuses depending on funds available, student demographics etc.

Educational Opportunity Program (EOP) Grants

The Educational Opportunity Program (EOP) Grants were established under the Budget Act of 1969 to provide financial assistance and support services to economically disadvantaged students admitted to the CSU under the Educational Opportunity Program. Program participants must be California residents enrolled in undergraduate degree programs and demonstrate financial need based on EFC, which may vary across campuses. The maximum authorized grant is \$2,000 per year by statute; however, funding for the program has remained static at approximately \$17.5 million since the 1980's. The average award amount of an EOP grant is \$836.

Graduate Equity Fellowships

The Graduate Equity Fellowship program was established in 1985-86 and targets educationally and economically disadvantaged students to promote diversity in our graduate study programs and increase participation in those fields of study. The available funding of approximately \$850,000 was permanently allocated to campuses in 1996-97. The average award amount of a Graduate Equity Fellowship is \$2,482.

CSU Future Scholars Program Awards

The CSU Future Scholars Program, funded through lottery revenues, was designed to promote college participation of students who are disadvantaged because of economic, educational, or environmental background. Awards are renewable based on satisfactory academic performance. Financial need is not a criterion for eligibility and significant discretion is accorded to campuses in the use of funding to achieve program objectives. This program was designated as a campus based program in 2000-01 thus permitting campuses greater flexibility in the use of available lottery funding. The average award amount of a Future Scholars award is \$1,316.

Campus Fee-Funded Grants

Several CSU campuses set aside one-third of their resources from campus fee increases per Trustee policy (Executive Order 661) to assist financially needy students. Executive Order 740 superseded Executive Order 661 in April 2000, as requested by campus and student leaders, eliminating this requirement. In 2016-2017, 3,102 students received campus fee grants for a total of \$4,595,010.

Institutional Scholarships

CSU campuses provide a variety of institutional scholarships to enrolled students. Funding for these awards typically come from endowments, annual gifts, or other resources designated for this purpose. Eligibility criteria for institutional scholarships vary widely by campus as do application requirements and selection procedures. The average institutional scholarship award amount is \$2,585.

This category of assistance does not include “Outside Scholarships and Grants” where the funding is external to the campus and the determination of eligibility or the designation of award recipients is made by a source external to the institution.

Athletic Scholarships and Grants

CSU campuses with intercollegiate athletic programs provide athletic scholarships or grants to student-athletes. Typically the funding is derived from revenues generated by athletic programs or development (fundraising) efforts of the campus and administered in conformance with applicable regulations and guidance from the National Collegiate Athletic Association (NCAA). Athletic grants and scholarships are generally awarded without respect to financial need but CSU policy requires that all awards be reported to the financial aid office to ensure the coordination of resources provided to need-based financial aid recipients and the prevention of over-awards to students. The average athletic scholarship award amount is \$10,054.

Education Doctorate Grant

The Education Doctorate Grant program was established in the 2007-08 academic year in conjunction with the independent educational doctorate program. Funding for the program is derived by a 10 percent set aside of the educational doctorate fees. Need based awards are made to California residents demonstrating the requisite need while completing their doctorate program. Award amounts are limited to the amount of education doctorate fees. In 2016-17, 203 students received funding for a total of \$849,951.

Doctor of Physical Therapy Grant

The Doctor of Physical Therapy Grant program was established in the 2012-13 academic year in conjunction with the doctorate program. Funding for the program is derived by a 33.3 percent set aside of the doctorate fees. Need based awards are made to California residents demonstrating the requisite need while completing their doctorate program. Award amounts are limited to the amount of physical therapy doctorate fees. In 2016-17, 429 students received funding for a total of \$3,267,894.

Doctor of Nursing Practice Grant

The Doctor of Nursing Practice Grant program was established in the 2012-13 academic year in conjunction with the doctorate program. Funding for the program is derived by a 20 percent set aside of the doctorate fees. Need based awards are made to California residents demonstrating the requisite need while completing their doctorate program. Award amounts are limited to the amount of nursing practice doctorate fees. In 2016-17, 24 students received funding for a total of \$301,611.

Graduate Business Grant

The Graduate Business Grant was established in the 2009-10 academic year consistent with the graduate business professional fee. Funding for the program is derived by a minimum 25 percent set aside of the graduate business professional fee. Need based awards are made to California residents demonstrating the requisite need while completing their master's program. Award amounts are limited to the amount of graduate business professional fees. In 2016-17, 970 students received funding for a total of \$2,897,496.

California Dream Loan

The California Dream Loan was established in the 2015-16 academic year. For the 2015-16 academic year, \$2 million was allocated systemwide. Of this, \$1 million lottery fund revenues and \$1 million state general fund was allocated to 22 CSU campuses based on eligible student population. In 2016-17, the state did not allocate funding for the CA Dream Program in the budget for the CSU. To fund the program at the same level as the 2015-2016 academic year, the CSU rolled-over unexpended funds from the 2015-2016 academic year and centrally funded the difference, with lottery funds, for a total of \$2 million Systemwide available for loans. As such, in 2016-17, 506 students received funding for a total of \$1,365,027. See California Dream Loan chart for additional information.

Waivers of Tuition Fee

In addition to traditional financial aid programs, fee waivers for tuition and campus-based fees are provided to students per the Education Code. During the years covered by this report, mandatory waivers are available to dependents or survivors of disabled or deceased California veterans, certain recipients (or children of recipients) of a Congressional Medal of Honor, children or surviving spouses of deceased public law enforcement or fire suppression employees who were California residents and who were killed in the course of law enforcement or fire suppression duties, and dependents of victims of the September 11, 2001 terrorist attacks. In addition, campuses have the authority to provide "discretionary" fee waivers to various categories of students. More detailed information is provided in the CSU Mandatory Waiver Report on page 10 of this report.

Recent and Anticipated Changes to Institutional Aid Policy

No changes are expected at this time. Table 1.1 reflects the Institutional Aid expenditures for 2016-17.

Mandatory Fee Waiver Programs

The *CSU Mandatory Waiver Report on page 10* reflects the actual number of waivers provided. The table also provides the minimum, average, and maximum amounts of waivers granted; as well as the aggregate cost of waivers for each CSU mandatory waiver program. CSU defines mandatory waivers as those mandated by state law – Alan Pattee, California Veteran, and 9-11 Victims Dependents. CSU also funds a number of non-state mandated waivers that are required by labor contracts (Employee and Dependents), state policy (California Residents 60+), and CSU policy that addresses state policy concerns (High School Students Special Programs).

Undergraduate Institutional Aid Recipients

The average and 90th percentile undergraduate institutional aid award amount provided per recipient for the prior two academic years and the current academic year are provided below:

<i>2015-2016</i>	Avg	90th Percentile
Amount	\$4,475	\$6,122

<i>2016</i>	Avg	90th Percentile
Amount	\$4,472	\$6,072

<i>2017-2018</i>	Avg	90th Percentile
Amount	\$4,480	\$6,100

Undergraduate Need-based Institutional Aid Recipients

In 2015-2016; 144,818 CSU undergraduates (35% of enrolled students) received funding from this source. Their financial characteristics and average institutional aid award are presented below.

<i>2015-2016</i>	Avg	90th Percentile
Parent Income *	\$27,827	\$55,760
Expected Family Contribution	\$722	\$2,792
Financial Need	\$19,804	\$25,676

** Dependent students*

In 2016-2017; 145,656 CSU undergraduates (35% of enrolled students) received funding from this source. Their financial characteristics and average institutional aid award are presented below.

<i>2016-2017</i>	Avg	90th Percentile
Parent Income *	\$28,569	\$56,550
Expected Family Contribution	\$831	\$3,040
Financial Need	\$19,962	\$26,248

** Dependent students*

Effectiveness of Institutional Aid Programs

The following information is from the 2016-2017 academic year:

Of all CSU students, 80% receive some form of financial assistance and 77% of undergraduate financial aid recipients have their fees fully covered by grants or waivers.

Regarding student indebtedness, the most recent national information for baccalaureate recipients is from the 2015-2016 academic year:

<i>2015-2016</i>	Amount of Debt	% with Debt
CSU Average	\$16,617	49%
California Average	\$22,744	53%
National Average	Not Currently Available	

CSU students are approximately 27% below the state average.

Undergraduate Student Costs and Resources

The following tables reflect data on the aggregate cost of attendance, EFC, financial need, and the aid received from various sources on the part of financially needy undergraduates enrolled at the CSU. The tables also include an entry for outstanding or unmet need.

In reviewing these tables it is important to note that the aggregate amounts of financial aid cannot be deducted from the aggregate need figure to determine the outstanding or unmet need. Some students with financial need receive aid in excess of their evaluated need; this occurs when students receive unsubsidized student loans or parent loans to replace all or a portion of the expected family contribution.

Financial need is determined by deducting the amount of the EFC determined through the federal need analysis methodology from the student's Cost of Attendance (COA). Student financial aid administrators on the campuses then offer the student a "package" of financial aid taking into account the total aid that the student might receive from all sources. When financial aid program resources are not adequate to award students the full amount of their financial need, a student may appear to have unmet need. Unmet need may be created when a student who is awarded work-study does not work the requisite number of hours required to earn the full amount of the work-study awarded. Students may also elect not to borrow, thus creating unmet need to the extent of student loans included as a part of the package. In addition, students may elect to decrease the costs used to determine their financial need, e.g., sharing an apartment with several roommates.

During 2016-17, there were 298,085 CSU undergraduates who demonstrated financial need and received funding. This number represents approximately 72 percent of the college year undergraduate headcount enrollment of 416,405 undergraduates for 2016-2017.

2016-17 Undergraduates

Aggregate Need and Aid	Students	Dollars	Avg
Cost of Attendance	297,811	\$6,204,770,320	\$20,835
Expected Family Contribution	297,738	\$878,051,970	\$2,949
Financial Need	297,738	\$5,325,793,038	\$17,888
Outside Scholarships & Other Resources	17,180	\$46,168,492	\$2,687
Federal Gift Aid	217,868	\$963,581,482	\$4,423
State Gift Aid (Cal Grants)	126,501	\$664,378,571	\$5,252
State Gift Aid (MCS)	33,452	\$43,380,155	\$1,297
Institutional Non-need-based Gift Aid	20,028	\$63,945,570	\$3,193
Institutional Need-based Gift Aid	133,401	\$586,098,800	\$4,394
All Scholarships & Grant Aid	283,406	\$2,392,125,827	\$8,441
Balance of Need after Gift Aid	293,081	\$2,945,737,853	\$10,051
Total Work-Study	6,909	\$19,371,021	\$2,804
Total Loans	138,659	\$1,005,975,730	\$7,255
Total Financial Aid	298,085	\$3,417,472,578	\$11,465
Outstanding/Unmet Need	262,352	\$2,047,749,281	\$7,805

2017-18 Undergraduates

Aggregate Need and Aid	Students	Dollars	Avg
Cost of Attendance	301,000	\$6,411,300,000	\$21,300
Expected Family Contribution	301,000	\$903,000,000	\$3,000
Financial Need	301,000	\$5,508,300,000	\$18,300
Outside Scholarships & Other Resources	19,500	\$52,650,000	\$2,700
Federal Gift Aid	221,000	\$998,920,000	\$4,520
State Gift Aid (Cal Grants)	128,000	\$704,000,000	\$5,500
State Scholarship (MCS)	36,200	\$65,703,000	\$1,815
Institutional Non-need-based Gift Aid	20,100	\$64,320,000	\$3,200
Institutional Need-based Gift Aid	135,000	\$621,000,000	\$4,600
All Scholarships & Grant Aid	285,950	\$2,506,593,000	\$9,157
Balance of Need after Gift Aid	296,219	\$3,001,707,000	\$10,130
Total Work-Study	7,050	\$19,740,000	\$2,800
Total Loans	140,266	\$1,025,344,460	\$7,310
Total Financial Aid	301,000	\$3,551,677,460	\$11,800
Outstanding/Unmet Need	264,880	\$2,113,152,343	\$7,978

2018-19 Undergraduates

Aggregate Need and Aid	Students	Dollars	Avg
Cost of Attendance	303,500	\$6,616,300,000	\$21,800
Expected Family Contribution	303,500	\$928,710,000	\$3,060
Financial Need	303,500	\$5,687,590,000	\$18,740
Outside Scholarships & Other Resources	19,900	\$54,128,000	\$2,720
Federal Gift Aid	221,600	\$1,019,360,000	\$4,600
State Gift Aid (Cal Grants)	130,000	\$728,000,000	\$5,600
State Scholarship (MCS)	38,000	\$69,540,000	\$1,830
Institutional Non-need-based Gift Aid	20,300	\$65,569,000	\$3,230
Institutional Need-based Gift Aid	136,500	\$641,550,000	\$4,700
All Scholarships & Grant Aid	288,325	\$2,578,147,000	\$9,300
Balance of Need after Gift Aid	296,219	\$3,109,443,000	\$10,500
Total Work-Study	7,080	\$19,824,000	\$2,800
Total Loans	141,431	\$1,040,932,160	\$7,360
Total Financial Aid	303,500	\$3,638,903,160	\$11,990
Outstanding/Unmet Need	267,080	\$2,212,581,787	\$8,284

Typical financial aid packages for dependent students

This table/graphic would show the financial aid package received by a typical dependent student with a family income of: (a) \$20,000; (b) \$40,000; (c) \$60,000; (d) \$80,000; and (e) \$100,000.

The following tables assume that the student resides in off-campus housing (typically a shared apartment) and is an entering freshman. The parent contribution assumes a family of four with only one in college.

2017-2018 Academic Year	Parent Income				
	\$20,000	\$40,000	\$60,000	\$80,000	\$100,000
Cost of Attendance	\$25,419	\$25,419	\$25,419	\$25,419	\$25,419
Parent Contribution	\$0	\$326	\$3,502	\$7,803	\$14,254
Financial Need	\$25,419	\$25,093	\$21,917	\$17,616	\$11,165
Typical Financial Aid Package					
Federal Pell Grant	\$5,920	\$5,570	\$2,370	\$0	\$0
Federal SEOG	\$800	\$750	\$0	\$0	\$0
Cal Grant	\$1,672	\$5,742	\$0	\$0	\$0
State University Grant	\$5,742	\$0	\$5,742	\$0	\$0
State Scholarship (MCS)	\$0	\$0	\$0	\$2,298	\$2,298
Federal Work-Study & Student Loans	\$11,285	\$13,031	\$13,805	\$15,318	\$8,867
Total Student Financial Aid	\$25,419	\$25,093	\$21,917	\$17,616	\$11,165

Table 1.1 Institutional Aid Expenditures									
	Actual 2015-2016		Actual 2016-2017		Projected 2017-2018		Projected 2018-2019		
	Students	Dollars	Students	Dollars	Students	Dollars	Students	Dollars	
State University Grants									
Undergraduate	120,981	\$566,340,802	121,621	\$565,852,610	124,000	\$619,948,800	124,000	\$619,948,800	
Graduate/Postbaccalaureate	14,132	\$75,888,714	13,919	\$75,567,134	14,200	\$81,000,000	14,200	\$81,000,000	
All Students	135,113	\$642,229,516	135,540	\$641,419,744	138,200	\$700,948,800	138,200	\$700,948,800	
Educational Opportunity Program (EOP) Grants									
Undergraduate	21,692	\$18,232,208	20,772	\$17,373,963	21,300	\$18,030,973	21,300	\$18,030,973	
Graduate/Postbaccalaureate	0	\$0	0	\$0	0	\$0	0	\$0	
All Students	21,692	\$18,232,208	20,772	\$17,373,963	21,300	\$18,030,973	21,300	\$18,030,973	
Graduate Equity Fellowships									
Undergraduate	0	\$0	0	\$0	0	\$0	0	\$0	
Graduate/Postbaccalaureate	357	\$878,866	316	\$784,289	330	\$825,000	340	\$850,000	
All Students	357	\$878,866	316	\$784,289	330	\$825,000	340	\$850,000	
CSU Future Scholars Program Awards									
Undergraduate	321	\$352,215	335	\$398,992	340	\$408,000	346	\$415,200	
Graduate/Postbaccalaureate	21	\$49,000	15	\$61,502	20	\$82,000	20	\$82,000	
All Students	342	\$401,215	350	\$460,494	360	\$490,000	366	\$497,200	
Campus Fee Grants									
Undergraduate	2,868	\$3,513,997	2,990	\$4,252,329	3,050	\$4,575,000	3,070	\$4,727,800	
Graduate/Postbaccalaureate	61	\$114,670	112	\$342,681	100	\$310,000	110	\$352,000	
All Students	2,929	\$3,628,667	3,102	\$4,595,010	3,150	\$4,885,000	3,180	\$5,079,800	
Institutional Scholarships									
Undergraduate	22,383	\$49,059,012	23,880	\$54,468,836	24,000	\$57,600,000	24,400	\$59,536,000	
Graduate/Postbaccalaureate	4,685	\$15,246,697	4,994	\$20,162,723	5,000	\$21,250,000	5,100	\$21,930,000	
All Students	27,068	\$64,305,709	28,874	\$74,631,559	29,000	\$78,850,000	29,500	\$81,466,000	
Athletic Scholarships & Grants									
Undergraduate	4,642	\$43,123,567	4,755	\$47,676,800	4,820	\$50,754,600	4,880	\$51,728,000	
Graduate/Postbaccalaureate	79	\$1,052,663	81	\$942,154	80	\$976,000	80	\$1,000,000	
All Students	4,721	\$47,176,230	4,836	\$48,618,954	4,900	\$51,730,600	4,960	\$52,728,000	
Education Doctorate Grants									
Undergraduate	226	\$871,757	203	\$849,951	210	\$923,200	215	\$954,600	
Doctorate of Physical Therapy Grants									
Undergraduate	410	\$3,515,396	429	\$3,267,894	440	\$3,520,000	450	\$3,645,000	
Doctorate of Nursing Grants									
Undergraduate	19	\$199,253	24	\$301,611	25	\$325,000	25	\$337,500	
Graduate Business Grant									
Undergraduate	33	\$91,258	43	\$115,422	40	\$112,000	40	\$114,000	
Graduate/Postbaccalaureate	995	\$3,186,757	927	\$2,782,074	940	\$2,961,940	950	\$3,040,000	
All Students	1,028	\$3,278,015	970	\$2,897,496	980	\$3,073,940	990	\$3,154,000	
Institutional-Grants & Scholarships									
Undergraduate	152,559	\$681,996,285	153,891	\$687,889,096	155,889	\$751,429,373	156,316	\$754,500,773	
Graduate/Postbaccalaureate	18,599	\$101,876,732	18,752	\$106,339,756	19,040	\$112,173,140	19,169	\$113,191,100	
All Students	171,158	\$783,873,017	172,643	\$794,228,852	174,929	\$863,602,513	175,485	\$867,691,873	
Institutional Long-Term Educational Loans									
Undergraduate	34	\$126,722	32	\$128,959	36	\$152,200	36	\$152,200	
Graduate/Postbaccalaureate	5	\$18,501	2	\$7,800	2	\$8,000	2	\$8,000	
All Students	39	\$145,223	34	\$136,759	38	\$160,200	38	\$160,200	
Unduplicated Students and Total Awards									
Undergraduate	152,648	\$682,645,594	154,048	\$689,342,250	155,924	\$751,581,573	156,351	\$754,652,973	
Graduate/Postbaccalaureate	18,603	\$101,895,233	18,753	\$106,347,556	19,042	\$112,181,140	19,042	\$113,199,100	
All Students	171,251	\$784,540,827	172,801	\$795,689,806	174,967	\$863,762,713	175,394	\$867,852,073	
Waivers of State Tuition Fee									
Undergraduate	13,594	\$56,397,432	14,568	\$61,570,513	14,600	\$64,678,000	14,800	\$66,600,000	
Graduate/Postbaccalaureate	2,890	\$12,691,602	3,023	\$13,626,758	3,050	\$14,335,000	3,060	\$14,535,000	
All Students	16,484	\$69,089,034	17,591	\$75,197,271	17,650	\$79,013,000	17,860	\$81,135,000	
Unduplicated Students and Total Assistance									
Undergraduate	165,285	\$739,043,026	167,476	\$750,749,581	169,536	\$816,259,573	170,159	\$821,252,973	
Graduate/Postbaccalaureate	21,108	\$114,586,835	21,399	\$120,071,940	21,694	\$126,516,140	21,704	\$127,734,100	
All Students	186,393	\$853,629,861	188,875	\$870,821,521	191,230	\$942,775,713	191,863	\$948,987,073	

The California State University Institutional Aid Program Report

January 2018

CSU Preliminary Mandatory Waiver Report

		2015/16 Reported	2016/17 Reported	2017/18 Budget	2018/19 Budget
Number of Fee Waivers					
Cal Vet/Medal of Honor		8,514	9,091	9,091	9,091
	Undergraduate	8,059	8,595	8,595	8,595
	Graduate	455	496	496	496
	Alan Pattee				
	Undergraduate	35	34	34	34
	Graduate	33	31	31	31
	Graduate	2	3	3	3
Minimum/Average/Maximum Waiver					
Cal Vet/Medal of Honor					
Undergraduate					
	Minimum	\$0	\$0	\$0	\$0
	Average	\$5,342	\$5,344	\$5,601	\$5,607
	Maximum	\$5,472	\$5,472	\$5,742	\$5,742
Graduate					
	Minimum	\$0	\$0	\$0	\$0
	Average	\$5,956	\$6,004	\$6,365	\$6,381
	Maximum	\$6,738	\$6,738	\$7,176	\$7,176
Alan Pattee					
Undergraduate					
	Minimum	\$0	\$0	\$0	\$0
	Average	\$5,343	\$5,321	\$5,576	\$5,584
	Maximum	\$5,472	\$5,472	\$5,472	\$5,742
Graduate					
	Minimum	\$0	\$0	\$0	\$0
	Average	\$6,738	\$5,231	\$5,574	\$5,574
	Maximum	\$6,738	\$6,738	\$6,738	\$7,176
Aggregate Cost of Waivers					
Cal Vet/Medal of Honor					
	Undergraduate	\$43,047,904	\$48,136,916	\$48,136,916	\$48,195,140
	Graduate	\$2,707,194	\$3,159,315	\$3,159,315	\$3,167,015
		\$45,755,098	\$51,296,231	\$51,296,231	\$51,362,155
Alan Pattee					
	Undergraduate	\$174,510	\$170,073	\$170,073	\$170,307
	Graduate	\$11,253	\$13,934	\$13,934	\$13,934
		\$185,763	\$184,007	\$184,007	\$184,241
<hr/>					
Mandatory Waivers		\$45,940,860	\$51,480,238	\$51,480,238	\$51,546,396
Other Required Waivers		\$21,801,976	\$20,136,524	\$23,759,190	\$23,791,397
Total Funded Waivers Cost		\$67,742,836	\$71,616,762	\$75,239,429	\$75,337,793
Total Funded Waivers		14,404	15,186	15,186	15,186

Section 70035 of the California Education Code directs the California State University to report annually to the Legislature on the DREAM loan program. The following information is provided in response to the request, which reads as follows:

(g) (1) The California State University and the University of California shall annually report to the Legislature as part of their respective annual financial aid reports the dollar amount of each DREAM loan awarded and number of students for whom a DREAM loan was awarded that academic year.

(2) Each institution, including an institution described in subdivision (f), shall annually report all of the following:

- (A) The total amount of funding in the institution’s DREAM revolving fund.
- (B) The annual amount contributed by the state to the institution’s DREAM revolving fund.
- (C) The annual amount contributed by the institution to the institution’s DREAM revolving fund.
- (D) The annual administrative costs of the DREAM Program at the institution.

2016-2017				
Campus	State General Fund	Lottery Funds	Total Funding	Annual Administrative Cost
Bakersfield	\$0	\$9,800	\$44,800	\$0
Channel Islands	\$0	\$0	\$18,300	\$0
Chico	\$0	\$6,000	\$34,500	\$0
Dominguez Hills	\$0	\$16,095	\$81,900	\$0
East Bay	\$0	\$4,000	\$43,500	\$2,175
Fresno	\$0	\$10,500	\$103,600	\$0
Fullerton	\$0	\$2,000	\$195,100	\$0
Humboldt	\$0	\$9,000	\$11,000	\$0
Long Beach	\$0	\$51,000	\$202,800	\$0
Los Angeles	\$0	\$96,000	\$202,800	\$0
Maritime	\$0	\$0	\$0	\$0
Monterey Bay	\$0	\$2,000	\$21,400	\$0
Northridge	\$0	\$133,900	\$232,000	\$0
Pomona	\$0	\$28,000	\$139,500	\$0
Sacramento	\$0	\$16,905	\$99,500	\$3,377
San Bernardino	\$0	\$44,100	\$101,400	\$0
San Diego	\$0	\$30,975	\$58,500	\$2,675
San Francisco	\$0	\$23,342	\$127,300	\$6,044
San Jose	\$0	\$17,600	\$104,900	\$0
San Luis Obispo	\$0	\$34,255	\$42,900	\$1,920
San Marcos	\$0	\$10,000	\$51,500	\$0
Sonoma	\$0	\$36,225	\$37,700	\$1,495
Stanislaus	\$0	\$20,334	\$45,100	\$2,148
Total	\$0	\$602,031	\$2,000,000	\$19,834

The difference between lottery funding and total funding is the unexpended funds rolled forward from the prior year.

FINAL REPORT: Aggregate Summary of Financial Aid Awarded

2016-17 Student Financial Assistance by Student Level

Undergraduates	Number	Total	Mean
Pell Grant	218,203	\$944,753,115	\$4,330
SEOG Grant	25,532	\$14,438,801	\$566
BIA Grant	129	\$433,060	\$3,357
Chafee Grant	586	\$2,636,950	\$4,500
Federal Teach Grant	195	\$536,377	\$2,751
Other Federal Grant	993	\$3,366,656	\$3,390
Direct Loan-Subsidized	132,703	\$548,531,558	\$4,134
Direct Loan- Unsubsidized	100,919	\$414,811,748	\$4,110
Parent Loan	14,119	\$180,634,653	\$12,794
Perkins Loan	3,228	\$7,386,905	\$2,288
Nursing Student Loan	124	\$415,639	\$3,352
Federal Work-Study	6,916	\$19,387,740	\$2,803
Cal Grant A	32,046	\$162,724,010	\$5,078
Cal Grant B	94,614	\$502,288,733	\$5,309
Middle Class Scholarship	42,114	\$52,395,375	\$1,244
State University Grant	121,621	\$565,852,610	\$4,653
EOP Grant	20,772	\$17,373,963	\$836
Future Scholars Scholarship	335	\$398,992	\$1,191
Graduate Business Grant	43	\$115,422	\$2,684
Campus Fee Grant	2,990	\$4,252,329	\$1,422
Institutional Scholarship	23,880	\$54,468,836	\$2,281
Athletic Scholarship	4,755	\$47,676,800	\$10,027
Institutional Long Term Loan	32	\$128,959	\$4,030
California Dream Loan	506	\$1,365,027	\$2,698
Other Scholarship/Grant	18,397	\$43,377,247	\$2,358
Other Educational Loan	6,126	\$62,427,263	\$10,191
Tuition Fee Waivers	14,568	\$61,570,513	\$4,226
Americorp Grant	212	\$425,973	\$2,009
Other Resources	3,637	\$17,582,862	\$4,834
All Federal Grants	218,812	\$969,531,615	\$4,431
Federal Direct Loans	155,574	\$963,343,306	\$6,192
All Federal Loans	157,106	\$1,153,550,932	\$7,343
Total Federal Aid	288,811	\$2,142,470,287	\$7,418
Cal Grants	126,666	\$665,041,751	\$5,250
CSU Scholarships, Grants, Waivers	168,017	\$751,734,485	\$4,474
Other Aid Programs	24,742	\$107,298,496	\$4,337
Work Study	6,916	\$19,387,740	\$2,803
All Scholarships, Grants, & Waivers	312,343	\$2,478,736,837	\$7,936
All Loans	160,025	\$1,217,472,181	\$7,608
Work Study & Loans	163,334	\$1,236,859,921	\$7,573
Total Aid: Grants, Loans, Work Study, & Waivers	340,691	\$3,715,596,758	\$10,906

2016-17 Student Financial Assistance by Student Level

Graduates	Number	Total	Mean
Pell Grant	3,251	\$10,365,259	\$3,188
SEOG Grant	0	\$0	\$0
BIA Grant	13	\$44,035	\$3,387
Chafee Grant	2	\$7,500	\$3,750
Federal Teach Grant	1005	\$2,745,747	\$2,732
Other Federal Grant	223	\$2,294,228	\$10,288
Direct Loan-Subsidized	5,255	\$22,606,326	\$4,302
Direct Loan- Unsubsidized	25,201	\$334,293,090	\$13,265
Graduate PLUS Loan	1,600	\$15,895,085	\$9,934
Perkins Loan	160	\$440,638	\$2,754
Nursing Student Loan	50	\$228,023	\$4,560
Federal Work-Study	345	\$959,280	\$2,781
Cal Grant A	33	\$159,914	\$4,846
Cal Grant B	57	\$358,553	\$6,290
Middle Class Scholarship	838	\$1,117,444	\$1,333
Graduate Equity Fellowship	315	\$782,289	\$2,483
State University Grant	13,919	\$75,567,134	\$5,429
Doctor of Education Grant	203	\$849,951	\$4,187
Doctor of Physical Therapy Grant	429	\$3,267,894	\$7,617
Doctor of Nursing Practice Grant	24	\$301,611	\$12,567
Graduate Business Grant	927	\$2,782,074	\$3,001
Campus Fee Grant	112	\$342,681	\$3,060
Institutional Scholarship	4,994	\$20,162,723	\$4,037
Athletic Scholarship	81	\$942,154	\$11,632
Institutional Long Term Loan	2	\$7,800	\$3,900
California Dream Loan	-	\$0	\$0
Other Scholarship/Grant	1,945	\$9,625,114	\$4,949
Other Educational Loan	913	\$10,826,618	\$11,858
Tuition Fee Waivers	3,023	\$13,626,758	\$4,508
Americorp Grant	211	\$767,163	\$3,636
Other Resources	1,471	\$11,278,549	\$7,667
All Federal Grants	4,077	\$17,750,997	\$4,354
Federal Direct Loans	26,923	\$356,899,416	\$13,256
All Federal Loans	27,004	\$373,463,162	\$13,830
Total Federal Aid	28,752	\$392,173,439	\$13,640
Cal Grants	104	\$592,290	\$5,695
CSU Scholarships, Grants, Waivers	21,180	\$118,663,751	\$5,603
Other Aid Programs	2,836	\$20,459,532	\$7,214
Work Study	345	\$959,280	\$2,781
All Scholarships, Grants, & Waivers	24,365	\$149,001,853	\$6,115
All Loans	27,474	\$384,297,580	\$13,988
Work Study & Loans	27,594	\$385,256,860	\$13,962
Total Aid: Grants, Loans, Work Study, & Waivers	38,946	\$534,258,713	\$13,718

All Students	Number	Total	Mean
Pell Grant	221,454	\$955,118,374	\$4,313
SEOG Grant	25,532	\$14,438,801	\$566
BIA Grant	142	\$477,095	\$3,360
Chafee Grant	588	\$2,644,450	\$4,497
Federal Teach Grant	1200	\$3,282,124	\$2,735
Other Federal Grant	1,216	\$5,660,884	\$4,655
Direct Loan-Subsidized	137,958	\$571,137,884	\$4,140
Direct Loan- Unsubsidized	126,120	\$749,104,838	\$5,940
Parent Loan	14,119	\$180,634,653	\$12,794
Graduate PLUS Loan	1,819	\$17,665,514	\$9,712
Perkins Loan	3,388	\$7,827,543	\$2,310
Nursing Student Loan	174	\$643,662	\$3,699
Federal Work-Study	7,261	\$20,347,020	\$2,802
Cal Grant A	32,079	\$162,883,924	\$5,078
Cal Grant B	94,671	\$502,647,286	\$5,309
Middle Class Scholarship	42,952	\$53,512,819	\$1,246
Graduate Equity Fellowship	316	\$784,289	\$2,482
State University Grant	135,540	\$641,419,744	\$4,732
EOP Grant	20,772	\$17,373,963	\$836
Doctor of Education Grant	203	\$849,951	\$4,187
Doctor of Physical Therapy Grant	429	\$3,267,894	\$7,617
Doctor of Nursing Practice Grant	24	\$301,611	\$12,567
Future Scholars Scholarship	350	\$460,494	\$1,316
Graduate Business Grant	970	\$2,897,496	\$2,987
Campus Fee Grant	3,102	\$4,595,010	\$1,481
Institutional Scholarship	28,874	\$74,631,559	\$2,585
Athletic Scholarship	4,836	\$48,618,954	\$10,054
Institutional Long Term Loan	34	\$136,759	\$4,022
California Dream Loan	506	\$1,365,027	\$2,698
Other Scholarship/Grant	20,342	\$53,002,361	\$2,606
Other Educational Loan	7,039	\$73,253,881	\$10,407
Tuition Fee Waivers	17,591	\$75,197,271	\$4,275
Americorp Grant	423	\$1,193,136	\$2,821
Other Resources	5,108	\$28,861,411	\$5,650
All Federal Grants	222,889	\$987,282,612	\$4,429
Direct Loans	182,497	\$1,320,242,722	\$7,234
All Federal Loans	184,110	\$1,527,014,094	\$8,294
Total Federal Aid	317,563	\$2,534,643,726	\$7,982
Cal Grants	126,770	\$665,634,041	\$5,251
CSU Scholarships, Grants, Waivers	189,197	\$870,398,236	\$4,600
Other Aid Programs	27,578	\$127,758,028	\$4,633
Work Study	7,261	\$20,347,020	\$2,802
All Scholarships, Grants, & Waivers	336,708	\$2,627,738,690	\$7,804
All Loans	187,499	\$1,601,769,761	\$8,543
Work Study & Loans	190,928	\$1,622,116,781	\$8,496
Total Aid: Grants, Loans, Work Study, & Waivers	379,637	\$4,249,855,471	\$11,195