

AGENDA

COMMITTEE ON EDUCATIONAL POLICY

Meeting: 3:00 p.m., Tuesday, January 22, 2019
Glenn S. Dumke Auditorium

Peter J. Taylor, Chair
Jane W. Carney, Vice Chair
Rebecca D. Eisen
Debra S. Farar
Wenda Fong
Emily Hinton
Lillian Kimbell
Thelma Meléndez de Santa Ana
John Nilon
J. Lawrence Norton
Romey Sabalius
Christopher Steinhauser

- Consent** 1. Approval of Minutes of the Meeting of November 13, 2018, *Action*
- Discussion** 2. Associate Degree for Transfer, *Information*
3. Student Financial Aid, *Information*
4. The Wang Family Excellence Awards, *Information*

**MINUTES OF MEETING OF
COMMITTEE ON EDUCATIONAL POLICY**

**Trustees of The California State University
Office of the Chancellor
Glenn S. Dumke Conference Center
401 Golden Shore
Long Beach, California**

November 13, 2018

Members Present

Peter Taylor, Chair
Jane W. Carney, Vice Chair
Rebecca D. Eisen
Debra S. Farar
Wenda Fong
Emily Hinton
Lillian Kimbell
Thelma Meléndez de Santa Ana
John Nilon
J. Lawrence Norton
Romey Sabalius
Christopher Steinhauser
Adam Day, Chairman of the Board
Timothy P. White, Chancellor

Trustee Taylor called the meeting to order.

Approval of Minutes

The minutes of September 11, 2018, were approved as submitted.

Student Mental Health Services

Denise Bevly, director of student wellness and basic needs initiatives, introduced the information item. She noted that the purpose of the presentation was to provide an update on the Basic Needs Initiative and an overview of student mental health services in the CSU. During the presentation she highlighted that campuses are enhancing food pantries, developing meal sharing programs and designating a CalFresh point of contact for students using the \$2.5 million allocated last year in Senate Bill 85.

Dr. Bevly also shared recent National College Health Assessment data showing that student demand for mental health services has increased nationally and in the CSU. Recognizing this growing need for services, campuses have invested in additional counselor positions, at a rate surpassing the growth of student headcount. Campuses continue to offer baseline services – such as counseling and emergency crisis intervention – as well as robust education, outreach and prevention programs. Finally, in cases where a student’s needs go above and beyond campus capabilities, partnerships with local and regional agencies and community organizations are critical to ensuring students receive comprehensive care.

Following the presentation, trustees had a number of questions. They asked about the counselor-to-student ratio and whether the CSU had a preferred ratio or had considered a standardized ratio across the system. Staff responded that campuses continue to take steps to improve their ratio, however given the unique needs of the student population at each campus a “one size fits all” benchmark would have unintended impacts. Additionally, trustees highlighted the need to ensure that services are reaching students in need and to talk more about removing the stigma surrounding mental health.

Student Veterans

Loren J. Blanchard, executive vice chancellor for Academic and Student Affairs, introduced the information item. In honor of Veteran’s Day, he recognized and thanked the members of the CSU community who had served or were serving in the armed forces.

Marshall Thomas, director of Active Duty and Veterans Affairs presented the item, highlighting that the CSU’s military-affiliated population continues to grow. Today, campuses enroll more than 21,000 military-affiliated students, which includes veterans, service members and military dependents. He shared that campuses continue to expand and improve veterans services to meet the needs of these students. For example, all campuses have staff devoted to assisting student veterans and support student veteran organizations. And, nearly all campuses have Veterans Resource Centers, where services are provided to student veterans. Matthew Aldrete, a student veteran from Humboldt State University, also shared his personal journey from the military to the CSU.

Following the presentation, trustees asked about the national concern of veterans’ benefit checks not being issued, and if it was a concern at CSU campuses. Staff responded that they continue to monitor the situation closely, but to date it hasn’t been widespread in the CSU. Trustees also asked if staff was analyzing persistence and completion rates for military-affiliated students as part of Graduation Initiative 2025. Staff indicated they had not parsed to that level, however with improved data from Cal State Apply there is a desire to do so.

Graduation Initiative 2025

Loren J. Blanchard, executive vice chancellor for Academic and Student Affairs, introduced the information item. He highlighted the Graduation Initiative 2025 Symposium that was held in October, recognizing the success of the event and thanking the participants.

James Minor, assistant vice chancellor and senior strategist for Academic and Student Affairs presented an overview of the final 2018 graduation rate data. For the first time in CSU history, the number of students earning a bachelor's degree surpassed 100,000. For the 2017-18 academic year, 105,431 students earned a bachelor's degree. This record number of degrees represents 6,000 more graduates compared to the prior year. Additionally, for the first time in the last two years, equity gaps for Pell recipients and for students who identify as African-American, American-Indian or Latino began to close. These gains were achieved while enrolling a greater number of students and a greater percentage of students from historically underserved communities.

Finally, Nathan Evans, chief of staff and senior advisor for Academic and Student Affairs, presented about the CSU's systemwide focus for the 2018-19 academic year. The priorities – identified by cross-representational workgroups – include continuously improving the implementation of the academic preparation policies, systematically improving the quality of advising that students receive, a concerted effort to increase students' average unit load and developing a framework for student engagement and well-being.

Following the presentation, trustees commended the Graduation Initiative 2025 work that led to the progress presented. They also expressed interest in seeing data on the implementation of the new academic preparation policies, once such data are available.

Trustee Taylor adjourned the Committee on Educational Policy.

COMMITTEE ON EDUCATIONAL POLICY

Associate Degree for Transfer

Presentation By

Loren J. Blanchard
Executive Vice Chancellor
Academic and Student Affairs

Alison M. Wrynn
Interim Assistant Vice Chancellor
Academic Programs and Faculty Development

Jane Conoley
President
California State University, Long Beach

Tiana Gripper
Student
California State University, Dominguez Hills

Summary

The California State University (CSU) is committed to providing access to students transferring from a California Community College (CCC). This commitment is consistent with the enrollment management priorities outlined in the California Education Code, which state that the CSU must prioritize enrollment of transfer students before California residents entering at the first year or sophomore levels.

The Associate Degree for Transfer (ADT), also known as “a degree with a guarantee,” places transfer students on a path to earn a baccalaureate degree from the CSU while at a CCC. Students are able to complete 60 semester units on an approved pathway at a CCC and be guaranteed admission to the CSU, though not guaranteed entry to a particular campus or major.

Once enrolled at the CSU, students are guaranteed to complete their baccalaureate degree in 60 semester units, as long as they are enrolled in a “similar pathway,” i.e., a major that has been deemed similar or related to their ADT by faculty at the CSU campus.

Since its creation in 2010, the ADT has steadily grown in participation. Today, there are 40 ADT pathways for students and all CCCs offer ADT programs. Faculty from both segments continue to collaborate to ensure pathways remain up-to-date and are relevant to California's workforce needs. The CCC and the CSU continue to market the ADT as the most effective path to a CSU degree.

It has been five years since the board received a presentation on the Associate Degree for Transfer. As such, this information item provides an overview of the ADT program as well as enrollment, persistence and completion trends for participants. These trends indicate clearly that as the CSU continues to pursue its Graduation Initiative 2025 goals, encouraging students to transfer with an ADT and pursue a major deemed similar to that ADT will be critical to student success.

Overview

In September 2010, the Student Transfer Achievement Reform Act (STAR Act) (SB 1440) was signed into law by the governor. This legislation requires community colleges to grant ADTs to students once they have met specified general education and major requirements for the degree. Once they have completed the ADT, students are eligible for transfer with junior standing into the CSU. In October 2013, subsequent related legislation, SB 440, was signed into law requiring further action by the CCC and CSU.

The requirements from this legislation were added to the Education Code as sections 66745–66749 and require the following of the CSU:

- A student who earns an ADT shall be deemed eligible for transfer into a CSU baccalaureate program when the student meets both of the following requirements:
 - Completion of 60 semester or 90 quarter units that are eligible for transfer to the CSU; and
 - Obtainment of a minimum grade point average of 2.0.
- Guarantee admission with junior status to any California community college student who meets the above requirements.
- Grant a student priority admission to his or her local CSU.
- Provide ADT applicants admission priority over all other community college transfer students.
- Redirect ADT students that are CSU eligible, but were not accepted to the CSU campus where they applied.
- Guarantee admission to the CSU but not to a specific campus or major.
- Admit applicants to a program or major and concentration, as applicable, that meets either of the following:
 - Is similar to the student's ADT as determined by the admitting CSU campus; or
 - May be completed with 60 semester units of study beyond the ADT, with completion ability determined by the admitting CSU campus.

- Take additional courses at the CSU campus so long as the ADT student is not required to take any more than 60 additional semester units or 90 quarter units at the CSU.

Faculty Collaboration

Since the STAR Act became law, the ADT program has been a model for intersegmental collaboration. A joint CCC-CSU implementation committee was developed to implement SB 1440. Curricular elements were delegated to the academic senates of the CSU and CCC.

This senate-led Intersegmental Curriculum Workgroup created a structure, the Transfer Model Curriculum (TMC), and gathered CSU and CCC discipline faculty to design TMCs that would meet the goals of SB 1440 while allowing some flexibility for CCC campuses to design their individual ADT degrees.

Once a TMC is completed, it is provided to CCC campuses to be used to design their ADT degree pathways. Simultaneously, the TMCs are submitted to the appropriate departments in the CSU for evaluation of fit, specifically whether a transfer student prepared as described by the TMC can complete a CSU baccalaureate with 60 additional units.

Pathways

There are currently 40 Associate Degree for Transfer pathways. When reviewing the major preferences of students transferring from a CCC to a CSU, these pathways account for 90 percent of their preferred majors.

- Administration of Justice
- Agriculture Animal Sciences
- Agriculture Business
- Agriculture Plant Sciences
- Anthropology
- Art History
- Biology
- Business Administration
- Chemistry
- Child and Adolescent Development
- Communication Studies
- Computer Science
- Early Childhood Education
- Economics
- Elementary Teacher Education
- English
- Environmental Science
- Film, Television, & Electronic Media
- Geography
- Geology
- Global Studies
- History
- Hospitality Management
- Journalism
- Kinesiology
- Law, Public Policy, and Society
- Mathematics
- Music
- Nutrition
- Philosophy

- Physics
- Political Science
- Psychology
- Public Health Science
- Social Justice Studies
- Social Work and Human Services
- Sociology
- Spanish
- Studio Arts
- Theatre Arts

Transfer Student Enrollment

The following charts and tables highlight enrollment trends for students transferring to the CSU. Unless otherwise explicitly stated, the charts show the breakdown of transfer students based on four categories:

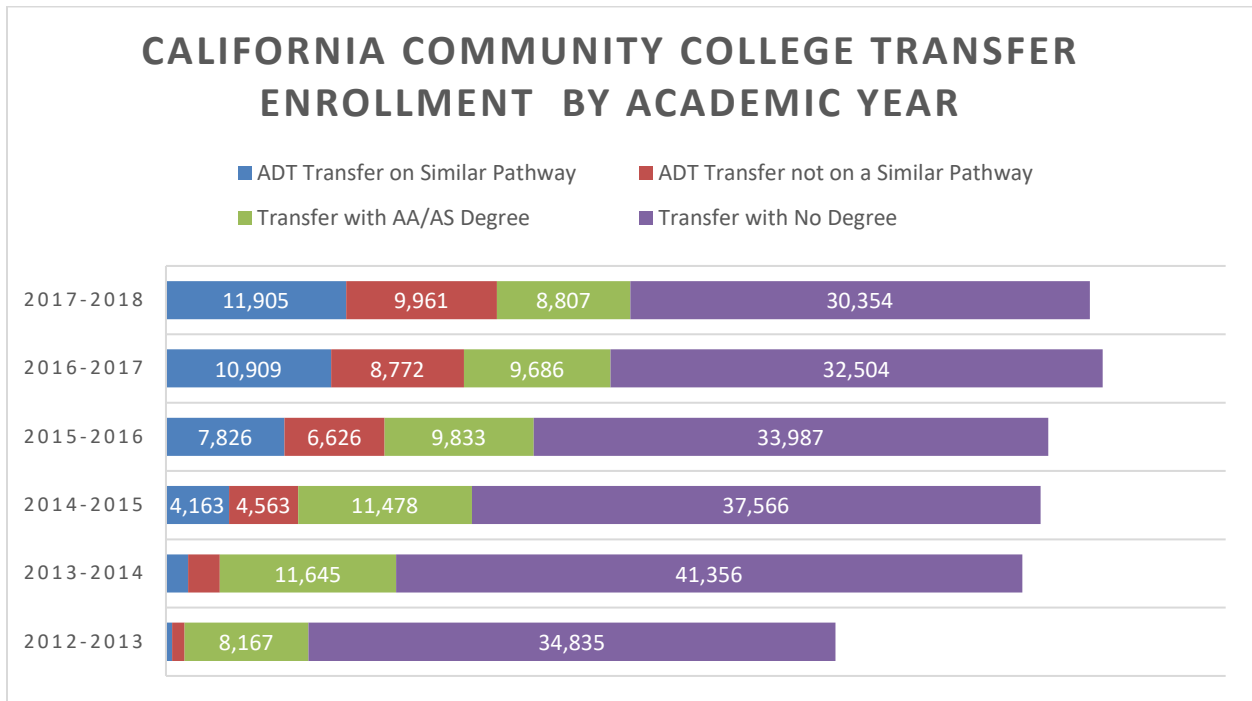
- *ADT Transfer on a Similar Pathway* – These are students transferring to a CSU campus with an ADT and who are enrolling in a major deemed similar or related to their ADT by the faculty at the enrolling CSU campus. These students are guaranteed to earn a degree after completing an additional 60 units at the CSU.
- *ADT Transfer not on a Similar Pathway* – These are students transferring to a CSU campus with an ADT but who are **not** enrolling in a major deemed similar or related to their ADT. As such, they are not guaranteed to earn a degree after earning an additional 60 units.
- *Transfer with AA/AS Degree* – These are students transferring to a CSU campus with an Associate of Arts (AA) or Associate of Science (AS) degree, not an ADT.
- *Transfer with No Degree* – These are students transferring to a CSU campus without a degree from their community college.

Year-Over-Year Enrollment

Since the first transfer students entered the CSU with an ADT in 2012-13, the ADT has quickly grown in popularity. The table below shows the growth in transfer students, by category:

	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
ADT Transfer on a Similar Pathway	402	1,464	4,163	7,826	10,909	11,905
ADT Transfer not on a Similar Pathway	832	2,100	4,563	6,626	8,772	9,961
Transfer with AA/AS Degree	8,167	11,645	11,478	9,833	9,686	8,807
Transfer with No Degree	34,835	41,356	37,566	33,987	32,504	30,354
Total	44,236	56,565	57,770	58,272	61,871	61,027

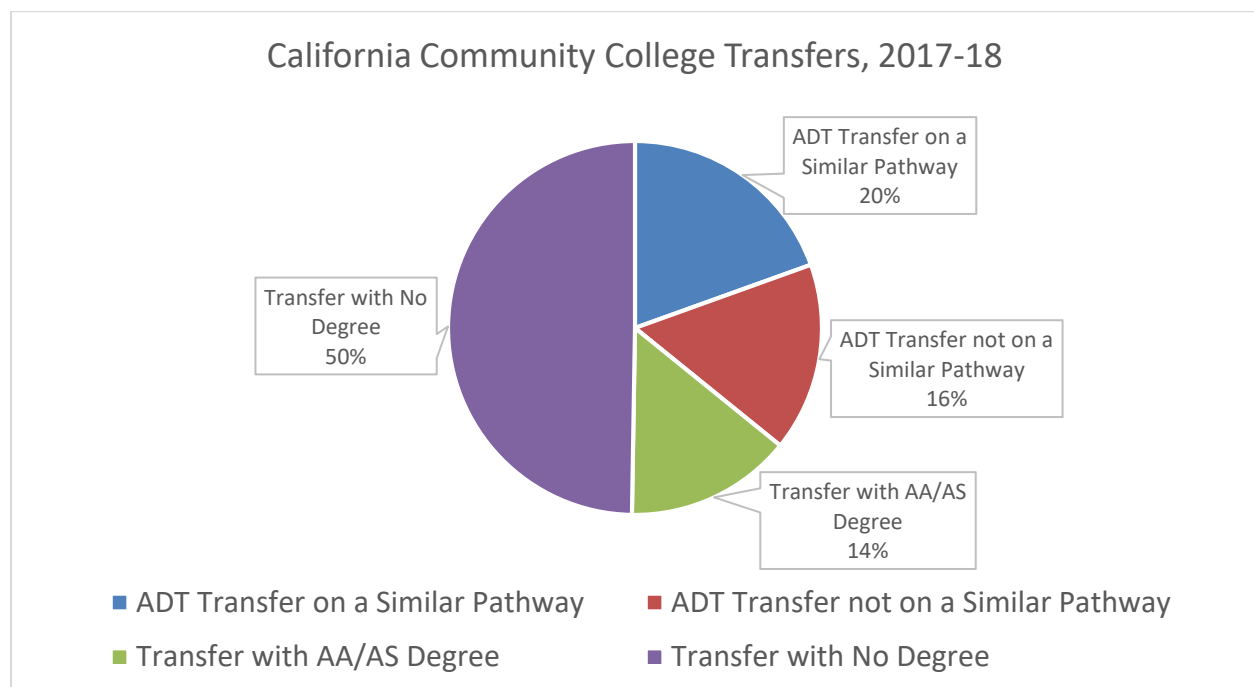
Additionally, these year-over-year enrollment data are reflected in the chart below:



The preceding data highlight that while the total number of transfer students entering the CSU has typically been on a positive trajectory, what is particularly notable is the increase in the percentage of these students who are entering with an ADT. Shown in the graph in blue and red, over the past six years the percent of students transferring with an ADT has increased tenfold, from 3 percent to 36 percent. At the same time, the number of students transferring with an AA/AS degree, or with no degree, has steadily decreased, further highlighting the growing popularity of the ADT.

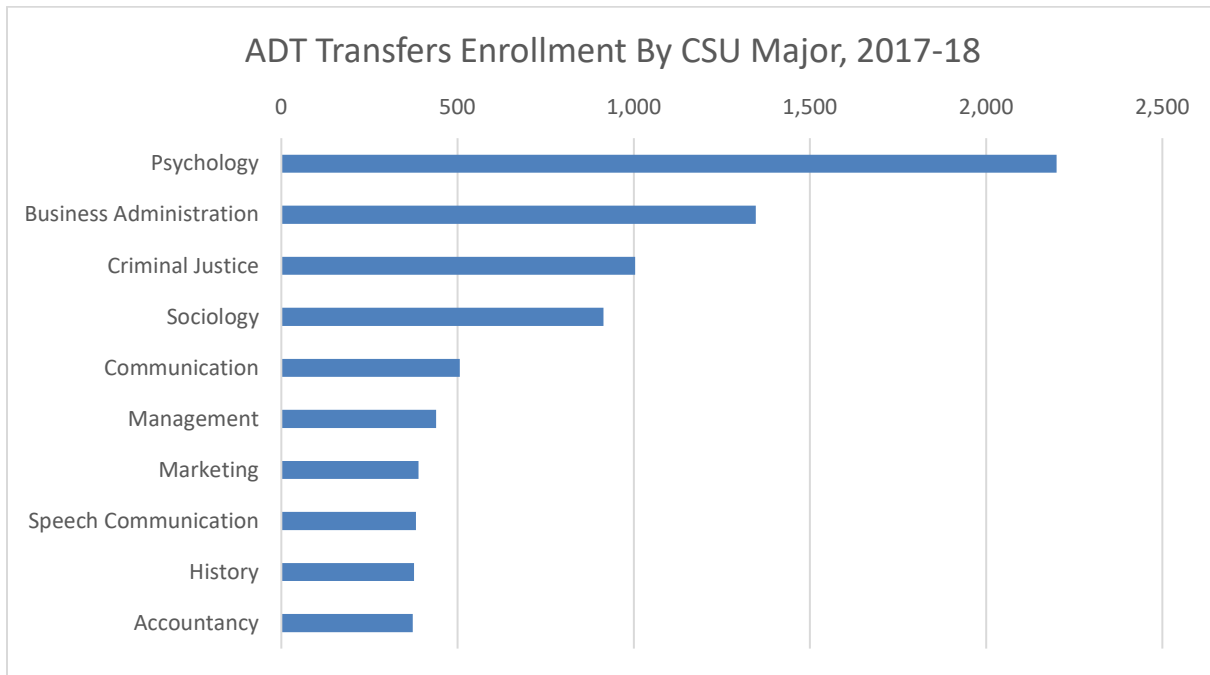
2017-18 Enrollment

For academic year 2017-18, 61,027 students entered the CSU as transfers from a California Community College. Of these students, half transferred with no degree (30,354) while slightly more than one-third enrolled with an ADT (21,866). This is demonstrated in the chart below:



2017-18 Enrollment by CSU Major

The chart below shows the majors that were favored by ADT students transferring to the CSU on a similar or related pathway in academic year 2017-18. The data show that psychology was the most popular major, with 2,200 students enrolling.



2017-18 Enrollment by Campus

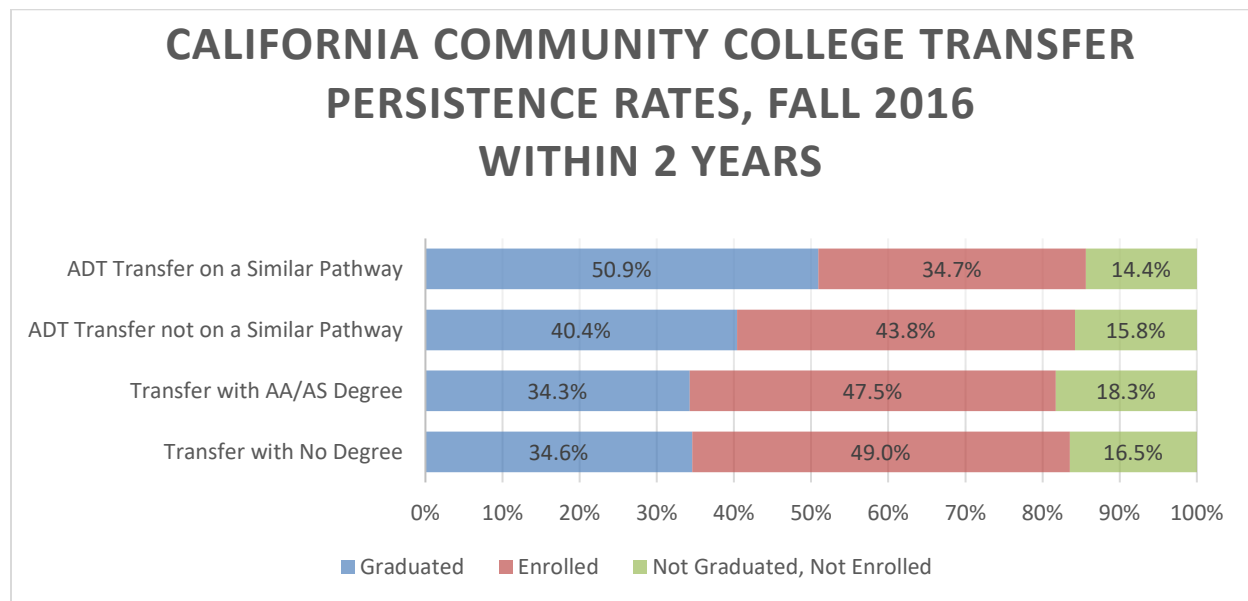
The following chart shows the 2017-18 enrollment of transfer students by campus. The chart also includes a line for "International Programs." While rare, a student transferring from a CCC to the CSU could opt to go immediately into a study abroad program.

Campus	ADT Transfer on a Similar Pathway	ADT Transfer not on a Similar Pathway	Transfer with AA or AS Degree	Transfer with No Degree	Total
Bakersfield	205	225	310	559	1,299
Channel Islands	327	369	174	618	1,488
Chico	387	327	513	901	2,128
Dominguez Hills	219	994	707	808	2,728
East Bay	534	430	705	1,249	2,918
Fresno	1,017	370	-	1,165	2,552
Fullerton	1,933	936	981	1,862	5,712
Humboldt	147	235	246	439	1,067
Long Beach	1,701	544	-	2,438	4,683
Los Angeles	398	701	755	1,376	3,230
Maritime Academy	7	-	7	27	41
Monterey Bay	227	267	256	375	1,125
Northridge	492	1,300	-	3,045	4,837
Pomona	454	495	706	1,591	3,246
Sacramento	1,007	434	3	3,467	4,911
San Bernardino	293	42	579	1,319	2,233
San Diego	777	1	-	2,431	3,209
San Francisco	569	1,019	645	1,910	4,143
San Jose	354	241	983	2,827	4,405
San Luis Obispo	121	215	174	286	796
San Marcos	245	83	535	917	1,780
Sonoma	268	256	208	280	1,012
Stanislaus	215	474	316	452	1,457
International Programs	8	3	4	12	27
All	11,905	9,961	8,807	30,354	61,027

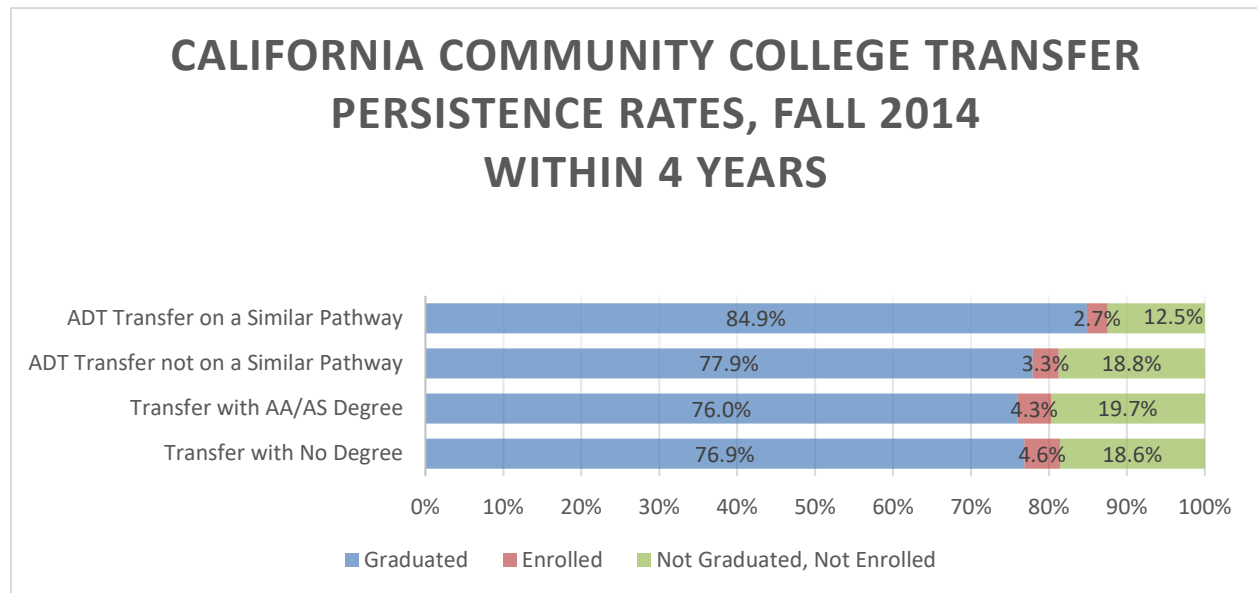
Associate Degree for Transfer Completion and Persistence Rates

The charts below highlight the persistence and completion rates for students transferring to the CSU. Similar to the enrollment charts, these show the breakdown of transfer students by the following categories: ADT Transfer on a Similar Pathway, ADT Transfer not on a Similar Pathway, Transfer with AA/AS Degree and Transfer with No Degree.

Data indicate that students entering the CSU with an ADT – either on a similar pathway or not on a similar pathway – graduate at higher rates than students transferring with a general AA/AS degree or with no degree. For students transferring to the CSU in fall 2016, more than 50 percent of those who earned an ADT and transferred on a similar pathway graduated in two years, compared to 34 percent of students who transferred with an AA/AS degree or with no degree.



Data from fall 2014 show similar trends for transfer students graduating within four years. For students who transferred with an ADT on a similar pathway, 85 percent graduated in four years, compared to 76 percent of students who transferred with an AA/AS degree or with no degree.



Conclusion

Since its creation in 2010, the Associate Degree for Transfer has been an effective pathway for students transferring from a California Community College to earn a baccalaureate degree from the California State University. The enrollment data indicate that it continues to grow in popularity, while the completion data show that these students are graduating at higher rates than their peers who transfer without an ADT.

The CSU continues to work closely with its CCC partners to ensure that ADT pathways are up-to-date, reflect California’s workforce needs and match students’ preferred academic paths. Additionally, intersegmental collaboration continues to expand opportunities in STEM fields for students interested in earning an ADT. As the program nears its ten-year anniversary, the CSU will also be embarking on an evaluation of the program structure and assessing student outcomes to ensure the program is most effectively supporting transfer students and meeting California’s student success goals.

COMMITTEE ON EDUCATIONAL POLICY

Student Financial Aid

Presentation By

Loren J. Blanchard
Executive Vice Chancellor
Academic and Student Affairs

Dean Kulju
Director, Student Financial Aid Services and Programs
Student Academic Services

Blake Sorensen
Student
San José State University

Summary

The California State University (CSU) is committed to providing access and opportunity to California students, regardless of their financial circumstances. To that end, the CSU continues to offer one of the most affordable undergraduate educational programs in the nation.

Student financial aid programs assist students with paying their postsecondary educational expenses. Financial aid is a critical element that enables CSU students to enroll in the university and be successful. Without this assistance, college would likely not be an option for many students.

Based on preliminary data for 2017-18, 81 percent of all CSU students received some form of financial aid. Fifty-nine percent of all undergraduates had the full cost of tuition covered by non-loan aid, in the form of grants, scholarships or waivers. In addition, 51 percent of students graduating with their bachelor's degree graduated with no student loan debt.

This information item provides an overview about the various forms that student financial aid may take at the CSU and how this aid is packaged to meet a student's individual need. As part of the March 2019 Board of Trustees meeting materials, a separate information item will be presented providing a more in-depth look at student financial aid, including a review of state and federal proposals and their potential impact on CSU students.

Cost of Attendance (Estimated Student Expenses)

The cost of attendance is an important component used to determine financial need. Recognition of student expenses is not limited for financial aid purposes to the amount of mandatory tuition and fees that a student pays. Federal Title IV financial aid program regulations require institutions to develop cost of attendance allowances that include mandatory tuition and fees as well as allowances for books and supplies, food and housing, transportation and personal expenses.

Institutions develop these allowances, also referred to as standard student budgets, differentiating among students living at home with their parents, students living in campus residence facilities and students living off-campus, typically in a shared apartment. For context, in 2017-18, 37 percent of CSU students lived at home, 15 percent lived on campus and 48 percent lived off campus.

To determine the estimated cost of attendance, CSU campuses and most other California institutions utilize data from the Student Expenses and Resources Survey (SEARS) that is administered by the California Student Aid Commission. Each year, these figures are indexed for inflation.

For 2018-19, the CSU cost of attendance estimates are shown below. Importantly, these figures are systemwide averages and do not represent the amount paid by any one student.

2018-19 Estimated Average Cost of Attendance

Undergraduate Academic Year Costs (9 months)

	At Home	On Campus	Off Campus
Tuition	\$5,742	\$5,742	\$5,742
Campus-based Fees*	\$1,561	\$1,561	\$1,561
Books and Supplies*	\$1,881	\$1,881	\$1,881
Room and Board*	\$5,369	\$13,762	\$14,072
Transportation*	\$1,394	\$1,179	\$1,408
Personal	\$1,475	\$1,475	\$1,475
TOTAL*	\$17,422	\$25,600	\$26,139

* Systemwide averages, actual amounts vary by CSU campus

Determination of Financial Need

To develop a financial aid package for a CSU student, a campus first determines that student's financial need – the difference between the Cost of Attendance (COA) at a CSU campus and the amount of a student's Expected Family Contribution (EFC). The process of determining the extent to which a student and his or her family are able to contribute toward postsecondary educational expenses is referred to as need analysis. The parameters and formulas in the need analysis for all federal student aid funding are approved by the U.S. Congress as federal methodology.

Applicants for federal student aid must annually complete a Free Application for Federal Student Aid (FAFSA). The State of California utilizes the FAFSA to determine eligibility for Cal Grants, and the CSU uses the FAFSA to determine eligibility for State University Grants and other need-based aid programs administered at the campus level.

The Dream Act application is used by students who qualify for an AB 540 Non-Resident Tuition Waiver to apply for state and institutionally-funded financial aid. The Dream Act application is provided by the California Student Aid Commission and uses the same need analysis as the FAFSA.

Overview of Student Financial Aid Programs

There are four types of financial aid programs: grants (including federal, state and institutional grants), scholarships, loans and work-study. At the CSU, student financial aid programs are authorized and funded by the U.S. Congress, the California State Legislature and governor, campuses and various private entities such as philanthropic organizations, foundations, civic clubs and community groups.

Grants and scholarships do not have to be repaid and are also referred to as “gift aid.” Loans and work-study are often referred to as “self-help aid,” as they require that a student repay the amount from future earnings (for loans) or earn the funding through a subsidized employment program while pursuing an education (for work-study).

Once a student has applied for financial aid, the campus must confirm that certain general eligibility requirements are met. To be eligible for financial aid a student must:

- Be a U.S. citizen or a permanent resident of the U.S. with a valid Social Security Number.
 - Alternately, the California Dream Act makes state and institutional funding available to students who qualify for an AB 540 Non-Resident Tuition Waiver.
- Have a high school diploma or recognized equivalent.
- Be enrolled or accepted for enrollment as a regular student who will be working toward a degree or certificate in an eligible program.

- If male, be registered for the Selective Service.
- Maintain satisfactory academic progress for financial aid.
- Not owe a repayment on a federal grant or be in default on a federal educational loan.
- Demonstrate financial need, except for the Middle Class Scholarship and some federal loans.
- Reapply for aid each year.
- Not have a federal or state drug conviction.

Individual award programs may have their own specific eligibility requirements. Those are covered in the descriptions below.

Federal Grants

Pell Grant

In 2016-17, 52 percent of CSU undergraduate students received a federal Pell Grant. Pell Grants provide a foundation of financial aid to which other aid may be added. They are typically awarded only to undergraduate students who have not earned a bachelor's degree. Under certain conditions, however, students enrolled in a postbaccalaureate teacher credential program may be eligible to receive federal Pell Grants.

For the 2018-19 award year, the maximum award a student can receive is \$6,095. The Pell Grant has a lifetime limit of the equivalent of six years (12 semesters) of full-time enrollment, which allows for part-time enrollment.

Federal Supplemental Educational Opportunity Grant

The Federal Supplemental Educational Opportunity Grant (FSEOG) is restricted to undergraduate students with the greatest financial need. These funds are allocated to institutions, including the CSU, and are awarded by the school to eligible students in accordance with federal regulations.

The availability of FSEOG funds varies among universities. As such, there is no guarantee that every eligible student will be able to receive an FSEOG. The federal grants range from \$100 to \$4,000 per award year; however, as funds are limited, most eligible CSU students do not receive the maximum award.

Teacher Education Assistance for College and Higher Education Grant

In 2016-17, the CSU awarded approximately 1,200 Teacher Education Assistance for College and Higher Education (TEACH) Grants to students. The TEACH Grant program is a federal financial aid program available to students enrolled in eligible programs.

Students who receive a TEACH Grant must agree to teach in a high-need field, at a low-income elementary or secondary school as a highly qualified teacher, full-time for at least four years. For the purposes of the TEACH Grant, a high-need field is defined as mathematics, science, foreign language, bilingual education, English language acquisition, special education, reading specialist or any other field that has been identified as high-need by the federal or state government, or a local educational agency. In California, these additional fields include English/drama/humanities, computer science and self-contained class (i.e. elementary classrooms).

The maximum annual amount a student can receive through the TEACH Grant program is \$4,000.

State Grant

Cal Grant

Cal Grants are awarded to eligible California students by the California Student Aid Commission. Selection is based on financial need, academic performance and other factors. Eligible students may receive up to a maximum of four years of full-time grant payments.

There are multiple types of Cal Grants, including:

- **Cal Grant A Entitlement Award** – Cal Grant A Entitlement Awards are for a maximum of the mandatory systemwide fees at the CSU, which is currently \$5,742 (for the 2017-18 year). These awards are available to students who graduate from high school and achieve a minimum high school grade point average of at least 3.0 on a 4.0 scale. Eligible students must have financial need at least equal to the amount of the award plus \$1,500 and have family income and assets below the established ceilings.
- **Cal Grant B Entitlement Award** – Cal Grant B Entitlement Awards provide grant funds to low-income students for a living allowance of \$1,672 for an academic year. For a student's first year, these funds can be used for books and supplies, transportation expenses and living expenses. With the second and subsequent years of Cal Grant B benefits, students are also eligible to receive an additional amount for tuition and mandatory systemwide fees. At the CSU, the tuition and fee award is currently \$5,742. These awards are available to students who graduate from high school with a minimum grade point average of at least 2.0 on a 4.0 scale. Eligible students must have a minimum financial need of \$700 and have family income and assets below the established ceilings.
- **Cal Grant California Community College Transfer Entitlement Award** – Transfer Entitlement Awards provide grant funds to transfer students. These awards will be either A or B depending on which income and asset ceilings the student falls under. Award levels will be the same as those for the A and B entitlement programs. These awards are for

students who graduated from a California high school, did not receive a Cal Grant Entitlement Award upon high school graduation and are transferring from a California Community College to an eligible four-year institution in California. Students must have a minimum grade point average of 2.4 on all transferrable community college coursework. Eligible students must be under the age of 28 and be pursuing a bachelor's degree in order to be eligible for an award.

- **Cal Grant A and B Competitive Award** – A limited number of Cal Grant awards are available for students who are not eligible to be considered for entitlement awards. These awards are for students who are not graduating high school seniors or recent graduates; eligibility for these awards prioritizes nontraditional students. Students will receive either A or B awards at grant levels referenced above for the entitlement programs. Eligible students must meet all basic eligibility requirements, have financial need and be under the income and asset ceilings.

CSU Grants

State University Grant

The State University Grant (SUG) program provides need-based awards to eligible undergraduate and graduate/postbaccalaureate students who are California residents or are otherwise determined as eligible (e.g. AB 540-eligible students). Based on preliminary data, more than 140,000 CSU students received SUG awards in 2017-18.

For the 2018-19 academic year, SUG funding is approximately \$701 million. Each CSU campus has established local awarding policies and priorities for these funds. Systemwide, the priority is to award a SUG at least equal to the amount of the State University Fee (\$5,742 for undergraduates; \$6,660 for students in teaching credential programs; and \$7,176 for graduate and postbaccalaureate students for 2017-18) to eligible students who apply for financial aid by March 2; who have an EFC of \$4,000 or less; and who are not receiving a Cal Grant or other award designated to cover fees.

The number of units a student has earned also affects SUG eligibility. Undergraduates in most programs may receive SUG for up to 150 units. Transfer students are reviewed for eligibility based on the number of units transferred. Graduate and credential students are also limited based on their program length.

Educational Opportunity Program Grant

The Educational Opportunity Program (EOP) Grant provides need-based awards to eligible undergraduate students who are California residents or otherwise determined as eligible (e.g. AB 540-eligible students). Based on preliminary data, approximately 21,000 CSU students received an EOP award in 2017-18.

The program is designed for students from economically disadvantaged backgrounds who are admitted to the CSU via the EOP program. Each campus receives a fixed allocation, which is awarded to students with the highest financial need (as demonstrated by a low EFC). The determination of “highest financial need” varies by campus, depending on its student profile.

Doctoral Grants

The CSU offers doctoral programs in education, nursing and physical therapy. Students who apply for financial aid through the FAFSA or Dream Act application – and who are enrolled in a doctoral program at a CSU campus – will be automatically considered for a grant in that program. Should a student qualify, they will be notified by their campus.

Middle Class Scholarship

The Middle Class Scholarship is a California program that provides a scholarship to undergraduate students with a maximum annual family income and household asset ceiling of \$171,000 (for 2018-19 awards). To qualify, a student must be enrolled at a CSU or University of California, be a California resident or an eligible AB 540 student and have filed for financial aid.

Students who qualify for a Middle Class Scholarship may be eligible for a scholarship of no less than 10 percent and no more than 40 percent of the mandatory systemwide tuition and fees. Students may receive the scholarship award for up to four years.

Work Study

The Federal Work-Study Program provides jobs for undergraduate and graduate students with financial need, allowing them to earn money to help pay for expenses related to their education. The program encourages community service work and work related to a student’s course of study.

Federal Work-Study earnings are equal to or greater than federal minimum wage, depending on the type of work a student is doing and the skills required. A Federal Work-Study award depends on the availability of funding at the institution, the institution's awarding policies for Federal Work-Study, the student’s financial need and their commitment to obtaining a qualified Federal Work-Study position and performing the work required.

Federal Work-Study Program employment may be on campus or off campus. Off-campus opportunities are typically with private nonprofit organizations or public agencies, with the work performed being in the public interest. CSU campuses typically limit a student's work hours to a maximum of 20 hours per week when classes are in session.

Loans

At the CSU, financial aid is packaged to prioritize grants, scholarships, work-study and only then – as needed – loans. Reviewing national data from 2016-17, it is clear that CSU students who do apply for a loan graduate with lower loan debt than their peers at other institutions. For 2016-17, the CSU average loan debt was \$17,367. This amount was significantly lower than the rate for the national four-year public institution average (\$27,293).

Packaging of Financial Aid Awards

Once a student's financial need is determined, the campus works to provide a "package" of financial aid to meet that need. This package takes into consideration a student's eligibility for a federal Pell Grant and a state Cal Grant before the institution adds additional grants, work-study employment and – if needed – student loans.

Financial aid offices at CSU campuses attempt to use all available financial aid program funding in an effort to meet as much of a student's financial need as possible. Each campus establishes its own "packaging" approach within the constraints of award limits that apply to individual aid programs, the funding priorities for the various aid programs, and, where applicable, the allocation of funds available for the program. One of the overriding considerations in the packaging process is to ensure that it provides for the fair and equitable treatment of all potentially eligible aid applicants and ensures that students in like circumstances are awarded in essentially the same manner.

Conclusion

Financial aid is critical to providing California's students access to a high-quality CSU education. By determining a student's financial need and packaging aid in a manner that prioritizes grant awards, campuses are able to provide individualized packages that minimize the financial burden wherever possible while providing aid to the maximum number of students.

COMMITTEE ON EDUCATIONAL POLICY

The Wang Family Excellence Awards

Presentation By

Timothy P. White
Chancellor

Background

More than 20 years ago, the Wang Family Excellence Award was established when then-California State University (CSU) Trustee Stanley T. Wang provided \$1 million to recognize the remarkable contributions of four CSU faculty members and one staff member annually over a 10-year period. Each selected recipient received an award of \$20,000.

In 2014, Trustee Emeritus Wang pledged a \$300,000 gift to the CSU to reinstate the Wang Family Excellence Award, continuing this recognition for faculty and staff through 2017. And, at the January 2017 Board of Trustees meeting, Chancellor Timothy P. White announced that Trustee Emeritus Wang had gifted an additional \$2.5 million, allowing the Wang Family Excellence Award to continue in perpetuity.

The Wang Family Excellence Award recognizes and celebrates CSU faculty members who have distinguished themselves through extraordinary dedication and exemplary achievements in their academic disciplines, while significantly contributing to the success of students. A staff administrator is also recognized for extraordinary accomplishments in her or his university assignment.

The selection process for the award begins with each campus president nominating one probationary or tenured faculty member for each of the award categories. The categories were modified in 2018 to reflect performance areas rather than academic disciplines. Award categories are:

- a) Outstanding Faculty Teaching;
- b) Outstanding Faculty Innovator in Student Success;
- c) Outstanding Faculty Scholarship; and
- d) Outstanding Faculty Service.

Campus presidents also nominate one staff administrator from their respective campuses for the Outstanding Staff Performance Award.

Nominations are considered by the Wang Family Excellence Award Selection Committee, appointed by Chancellor White in consultation with Trustee Emeritus Wang. This committee includes two members of the Board of Trustees, the Executive Vice Chancellor for Academic and Student Affairs, the Vice Chancellor for Human Resources, chair of the Academic Senate CSU and a CSU faculty member who was previously awarded the Wang Family Excellence Award.

Nominees are reviewed and considered for selection based on the following criteria:

- Nominees should have made truly remarkable contributions to the advancement of their respective universities and/or the CSU system.
- Nominees should have a demonstrated record of unusually meritorious achievements documented by evidence of superior accomplishments and contributions to their academic discipline or university assignment.
- A nominee's activities must advance the mission of the university, bring benefit and credit to the CSU and contribute to the enhancement of the CSU's excellence in teaching, learning, research, scholarly pursuits, student support and community contributions.

The Wang Family Excellence Awards will be presented during a ceremony at the January 2019 Board of Trustees meeting.