

## APPENDIX 6

# Summary and History of California Financial Aid Programs

The following is general summary of the California financial aid programs administered by the California Student Aid Commission as of Fall 2017. The first section provides a review of all Cal Grant Programs, the largest financial aid program in the state; the second section covers all other state grant or scholarship programs; the final section provides information on loan assumption programs.

## Cal grant programs

Cal Grant Awards seek to make postsecondary undergraduate education affordable for qualified students in California. Qualifying institutions where students may receive awards include both public, private non-profit, and private-for profit institutions in California. There are three main categories of Cal Grant Awards, Cal Grants A, B, and C. Cal Grants A and B are broken down into two subcategories, Entitlement and Competitive Awards. Students may qualify for Cal Grant A or Cal Grant B, depending on family income and their academic performance. Students pursuing postsecondary technical, vocational or career education may be eligible for Cal Grant C.

In general, aid applicants may only be considered for Cal Grant Entitlement Awards within one year of their high school graduation date unless they are transferring to 4-year postsecondary program from a California Community College (CCC). Otherwise, they may be considered for competitive awards. Program details and the legislative history for each type of Cal Grant Entitlement Award, A and B, are presented below, followed by the program details and legislative history for Cal Grant Competitive Awards, A and B, followed by the details and history for Cal Grant C.

### *Cal Grant A Entitlement Awards*

#### *PROGRAM OVERVIEW:*

**Authorizing legislation (main):** 2000 Senate Bill No. 1644: Ortiz-Pacheco-Poochigian-Vasconcellos Cal Grant Act

**Program purpose and description:** Cal Grant A Awards seek to make postsecondary education at California 4-year postsecondary institutions affordable for qualified students. Cal Grant A awards may be renewed for a total of the equivalent of four years of full-time attendance in an undergraduate program provided that minimum financial need continues to exist. However, Cal Grant A Entitlement Awards are only available to recent high school graduates or students who are transferring to a 4-year institution from a CCC. Cal Grant A Entitlement Awards may be used for tuition or student fees, or both, by students pursuing a postsecondary program that is not less than two academic years. Award amounts vary based on institution type. Students who qualify for a Cal Grant A Entitlement Award but choose to first attend a CCC and then transfer to a four-year college in California may put their award on reserve. CCC students who were not eligible for an award upon high school graduation but who attend a CCC and transfer to a qualifying 4-year institution may be eligible for a transfer entitlement award. (Ortiz-Pacheco-Poochigian-Vasconcellos Cal Grant Act," 2000).

## **Institutional Requirements:**

Qualifying institutions for Cal Grant A Awards are not CCCs that have a federal student loan Cohort Default Rate (CDR) below 15.5 percent and a graduation rate above 30 percent and must meet one of the following criteria:

- Is a California private or independent postsecondary educational institution that participates in the Pell Grant Program and in at least two of the following federal student aid programs:
  - a) Federal Work-Study Program.
  - b) Federal Stafford Loan Program.
  - c) Federal Supplemental Educational Opportunity Grant Program.
- Is a nonprofit institution headquartered and operating in California that certifies to the California Student Aid Commission (CSAC) that a) 10 percent of the institution's operating budget, as demonstrated in an audited financial statement, is expended for purposes of institutionally funded student financial aid in the form of grants, b) demonstrates to CSAC that it has the administrative capacity to administer the funds, c) is accredited by the Western Association of Schools and Colleges, and d) meets any other state-required criteria adopted by regulation by CSAC in consultation with the California Department of Finance.<sup>1</sup>
- A California public postsecondary educational institution. ("Ortiz-Pacheco-Poochigian-Vasconcellos Cal Grant Act," 2000)

**Eligibility determination and award process:** Eligibility for a Cal Grant A is determined following two standards: general Cal Grant eligibility requirements and Entitlement specific requirements. To meet general Cal Grant requirements, applicants must:

- Be a California Resident or AB 540 eligible.<sup>2</sup>
- Be a U.S. Citizen or eligible non-citizen
- If male, have met Selective Service Requirements.
- Attend a Cal Grant eligible school.
- Have not earned a bachelor's degree.
- Not be in grant repayment or in default on a student loan.
- Not be incarcerated.
- Be enrolled at least half-time to receive payment.
- Maintain satisfactory academic progress to receive payment.

Specific Cal Grant A requirements:

- Student has demonstrated financial need.
- Student has attained a high school GPA of at least 3.0. (only applies to recent high school graduates)
- The student's household has an income and asset level not to exceed the Cal Grant A level set forth by CSAC.<sup>3</sup>

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<sup>1</sup> A regionally accredited institution that was deemed qualified by the commission to participate in the Cal Grant Program for the 2000–01 academic year shall retain its eligibility as long as it maintains its existing accreditation status.

<sup>2</sup> Assembly Bill 540 (Stats. 2001, ch. 814) added a new section, 68130.5, to the California Education Code, thereby creating a new exemption from payment of non-resident tuition for certain non-resident students who have attended high school in California and received a high school diploma or its equivalent. AB 2000 expanded the scope of AB 540 in 2014.

<sup>3</sup> In 2015-16 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.

- Student must be enrolled in an undergraduate program that no less than two years. A student enrolled in a program at a California Community College that is two years or less who meets Cal Grant A eligibility standards may have their award held in reserve for up to two years until he or she attends a qualifying institution.

Specific Cal Grant Entitlement Award Requirements for recent high school graduates: Students meeting the above requirements who attend a qualifying institution are guaranteed a Cal Grant A award if they apply for aid by March 2 of their senior year in high school or the year following graduation.

Specific Cal Grant Entitlement Award Requirements for transfer students: Students who were not previously awarded a Cal Grant but are enrolled in a CCC and are matriculating to a qualifying baccalaureate program are guaranteed a Cal Grant A award as long as they meet the specific Cal Grant A requirements above, are younger than 28 years of age and have a verified community college GPA of 2.40 on a minimum of 24 semester units or the equivalent.

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

1. Submit a Free Application for Federal Student Aid (FAFSA) or CA Dream Act Application
2. Submit a high school (or community college) GPA to CSAC
3. Create a "WebGrants for Students" account. (["Cal Grant Programs," 2012](#))

*LEGISLATIVE HISTORY:*

**Originating legislation:** 2000 Senate Bill No. 1644: Ortiz-Pacheco-Poochigian-Vasconcellos Cal Grant Act

**Original legislative intent:** To expand the existing, competitive Cal Grant Program through a two-tiered approach that would guarantee a grant to graduating high school seniors and specified transfer students.

**Narrative history from original to current:** Before the sweeping reforms made to Cal Grants in 2000, there were no comprehensive entitlement-based awards in California. Previous legislation established subsistence grants which helped create Cal Grant B as we know it today, but none of the programs established previously guaranteed funding to all students who met the academic and financial requirements (["The State Scholarship Subsistence Act" 1967](#)). Funding and amount allocation is decided by the annual budget act, where funds are appropriated based on a line item in the yearly budget. The current iteration of this funding can be found in AB No. 97 (["Budget Act of 2017," 2017](#)). There have been additional legislative revisions to this and other Cal Grant programs which are summarized in the Appendix, table 4.

## **Cal Grant B Entitlement Awards**

*PROGRAM OVERVIEW:*

**Authorizing legislation (main):** 2000 Senate Bill No. 1644: Ortiz-Pacheco-Poochigian-Vasconcellos Cal Grant Act

**Program purpose and description:** Cal Grant B Awards assist qualifying low-income students with the cost of a 4-year, 2-year or vocational degree or certificate at a California postsecondary institution. Cal Grant B awards may be renewed for a total of the equivalent of four years of full-time attendance in an undergraduate program provided that minimum financial need continues to exist. However, Cal Grant B Entitlement Awards are only available to recent high school graduates or students who are transferring to a 4-year institution from a CCC. Cal Grant B Entitlement Award recipients receive a stipend for access costs for the first year in which they qualify, regardless of institution type. After completing their first year of college, they receive the access stipend as well as tuition and fee assistance at any qualifying institution,

assuming they continue to meet the financial requirements. ("Ortiz-Pacheco-Poochigian-Vasconcellos Cal Grant Act," 2000).

### **Institutional Requirements:**

Qualifying institutions for Cal Grant B Awards are have a federal student loan Cohort Default Rate (CDR) below 15.5 percent and a graduation rate above 30 percent and must meet one of the following criteria:

- Is a California private or independent postsecondary educational institution that participates in the Pell Grant Program and in at least two of the following federal student aid programs:
  - d) Federal Work-Study Program.
  - e) Federal Stafford Loan Program.
  - f) Federal Supplemental Educational Opportunity Grant Program.
- Is a nonprofit institution headquartered and operating in California that certifies to the California Student Aid Commission (CSAC) that a) 10 percent of the institution's operating budget, as demonstrated in an audited financial statement, is expended for purposes of institutionally funded student financial aid in the form of grants, b) demonstrates to CSAC that it has the administrative capacity to administer the funds, c) is accredited by the Western Association of Schools and Colleges, and d) meets any other state-required criteria adopted by regulation by CSAC in consultation with the California Department of Finance.
- A California public postsecondary educational institution. ("Ortiz-Pacheco-Poochigian-Vasconcellos Cal Grant Act," 2000)

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

- Be a California Resident or AB 540 eligible.<sup>4</sup>
- Be a U.S. Citizen or eligible non-citizen
- If male, have met Selective Service Requirements.
- Attend a Cal Grant eligible school.
- Have not earned a bachelor's degree.
- Not be in grant repayment or in default on a student loan.
- Not be incarcerated.
- Be enrolled at least half-time to receive payment.
- Maintain satisfactory academic progress to receive payment.

Specific Cal Grant B requirements:

- Student has demonstrated financial need
- Attained a high school GPA of at least 2.0 (only applies to recent high school graduates)
- The student's household has an income and asset level not to exceed the Cal Grant B level set forth by CSAC<sup>5</sup>
- Student is a current high school senior or prior year high school graduate.

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<sup>4</sup> Assembly Bill 540 (Stats. 2001, ch. 814) added a new section, 68130.5, to the California Education Code, thereby creating a new exemption from payment of non-resident tuition for certain non-resident students who have attended high school in California and received a high school diploma or its equivalent. AB 2000 expanded the scope of AB 540 in 2014.

<sup>5</sup> In 2015-16 the Cal Grant B income ceiling for a four-person household was \$45,800. The asset ceiling was \$67,500 and \$32,100 for dependent and independent students, respectively.

Specific Cal Grant Entitlement Award Requirements for recent high school graduates: Students meeting the above requirements who attend a qualifying institution are guaranteed a Cal Grant A award if they apply for aid by March 2 of their senior year in high school or the year following graduation.

Specific Cal Grant Entitlement Award Requirements for transfer students: Students who were not previously awarded a Cal Grant but are enrolled in a CCC and are matriculating to a qualifying baccalaureate program are guaranteed a Cal Grant B award as long as they meet the specific Cal Grant B requirements above, are younger than 28 years of age and have a verified community college GPA of 2.40 on a minimum of 24 semester units or the equivalent.

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

4. Submit a Free Application for Federal Student Aid (FAFSA) or CA Dream Act Application
5. Submit a high school GPA to CSAC
6. Create a "WebGrants for Students" account. (["Cal Grant Programs," 2012](#))

*LEGISLATIVE HISTORY:*

**Originating legislation:** 1967 Senate Bill No. 160: The State Scholarship Subsistence Act (This act is considered the precursor to Cal Grant B.)

**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 Scholarship Subsistence Act," 1967](#)).

**Narrative history from original to current:** Before the sweeping reforms made to Cal Grants in 2000, there were no comprehensive entitlement-based awards in California. Previous legislation established subsistence grants which helped create Cal Grant B as we know it today, but none of the programs established previously guaranteed funding to all students who met the academic and financial requirements (["The State Scholarship Subsistence Act" 1967](#)). In 2014, legislation was passed to increase the maximum amount awarded for all Cal Grant B awards, to better take into account the increase in cost of living in California ([2014](#)). Funding and amount allocation is decided by the annual budget act, where funds are appropriated based on a line item in the yearly budget. The current iteration of this funding can be found in AB No. 97 (["Budget Act of 2017," 2017](#)). There have been additional legislative revisions to this and other Cal Grant programs which are summarized in the Appendix, table 4.

## **Cal Grant A Competitive Awards**

*PROGRAM OVERVIEW:*

**Authorizing legislation (main):** 2000 Senate Bill No. 1644: Ortiz-Pacheco-Poochigian-Vasconcellos Cal Grant Act

**Program purpose and description:** Cal Grant Competitive Awards were created to provide financial assistance to students who are not eligible for entitlement awards, e.g., students in their third year at a qualifying institution. Given that a limited quantity of awards are available (originally, the legislation established a total 22,500 competitive awards for both Cal Grants A and B, but as of 2015-16, the total is 25,750 awards), 50 percent of available awards are available to all California residents attending a postsecondary institution in California, including community college students. The other 50 percent of available awards are reserved solely for residents who will be enrolled at a CCC. As with the Entitlement Awards, the Competitive Awards program provides both Cal Grant A and B awards, but since Cal Grant A

awards are not used at CCCs, up to only 12,875 awards could be awarded as Cal Grant A. Cal Grant A Competitive Awards may be used to cover the same types of expenses as Cal Grant A Entitlement Awards. ("Ortiz-Pacheco-Poochigian-Vasconcellos Cal Grant Act," 2000).

**Eligibility determination and award process:** To be eligible for Cal Grant A Competitive Awards, the applicant must not be currently awarded an Entitlement award and must meet general Cal Grant requirements. The student must also meet the specific requirements for Cal Grant A, excluding the requirement that they must be no more than one year removed from high school. Selection criteria were established to give special consideration to disadvantaged students, taking into consideration those financial, educational, cultural, language, home, community, environmental, and other conditions that hamper a student's access to, and ability to persist in, postsecondary education programs. Due to the limited number of awards relative to qualifying applicants, California Dream Act applicants currently do not receive Cal Grant Competitive Awards. ("Cal Grant Competitive Awards," 2012).

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

#### *LEGISLATIVE HISTORY:*

**Originating legislation:** 1955 Assembly Bill No. 1546: The Hegland-Shell-Donahoe and Donald Doyle Act

**Original legislative intent:** This Act established competitive scholarships administered by the State. Students must demonstrate financial need and be approved by the State Scholarship Commission to receive one of the awards. In the original legislation grants were awarded to two individuals of each senatorial senate and assembly district ( 240 individual scholarships), as well as 400 at-large scholarships for the state. The intent of this original legislation was to increase the number of available scholarships each year ("The Hegland, Shell, Donahoe, and Donald Doyle Act," 1955).

**Narrative history from original to current:** The first time competitive state-based aid was recommended came in 1948 with the Strayer Committee Report on the Needs of California in Higher Education. This report proposed establishing competitive subsistence scholarships for individuals that demonstrated outstanding ability and were actually in need of financial aid (Strayer, 1948). Seven years after this report was published the Hegland-Shell-Donahoe and Donald Doyle Act was passed, in 1955, creating a competitive scholarship that would cover tuition and fees, but not subsistence needs (i.e. living expenses)

("The Hegland, Shell, Donahoe, and Donald Doyle Act," 1955). In 2000, when the Ortiz-Pacheco-Poochigian-Vasconcellos Cal Grant Act was passed it created the Competitive Cal Grant A & B programs as they are known today. Like Entitlement Awards, funding and amount allocation is decided by the annual budget act, currently AB No. 97 ("Budget Act of 2017," 2017).

## **Cal Grant B Competitive Awards**

#### *PROGRAM OVERVIEW:*

**Authorizing legislation (main):** 2000 Senate Bill No. 1644: Ortiz-Pacheco-Poochigian-Vasconcellos Cal Grant Act

**Program purpose and description:** Cal Grant Competitive Awards were created to provide financial assistance to students who are not eligible for entitlement awards, e.g., students in their third year at a qualifying institution. Given that a limited quantity of awards are available (originally, the legislation established a total 22,500 competitive awards for both Cal Grants A and B, but as of 2015-16, the total is

25,750 awards), 50 percent of available awards are available to all California residents attending a postsecondary institution in California, including community college students. The other 50 percent of available awards are reserved solely for residents who will be enrolled at a CCC. As with the Entitlement Awards, the Competitive program provides both Cal Grant A and B awards but since at least half of awards are reserved for students enrolled at a CCC and Cal Grant A awards cannot be used there, most of the Competitive Awards are awarded as Cal Grant B. Cal Grant B Competitive Awards may be used to cover the same types of expenses as Cal Grant B Entitlement Awards. ("Ortiz-Pacheco-Poochigian-Vasconcellos Cal Grant Act," 2000).

**Eligibility determination and award process:** To be eligible for Cal Grant Competitive Awards the applicant must not be currently awarded an Entitlement award and must meet general Cal Grant requirements. The student must also meet the specific requirements for Cal Grant B, excluding the requirement that they must be no more than one year removed from high school. Selection criteria were established to give special consideration to disadvantaged students, taking into consideration those financial, educational, cultural, language, home, community, environmental, and other conditions that hamper a student's access to, and ability to persist in, postsecondary education programs. Due to the limited number of awards relative to qualifying applicants, California Dream Act applicants currently do not receive Cal Grant Competitive Awards. ("Cal Grant Competitive Awards," 2012).

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

#### *LEGISLATIVE HISTORY:*

**Originating legislation:** 1955 Assembly Bill No. 1546: The Hegland-Shell-Donahoe and Donald Doyle Act

**Original legislative intent:** This Act established competitive scholarships administered by the State. Students must demonstrate financial need and be approved by the State Scholarship Commission to receive one of the awards. In the original legislation grants were awarded to two individuals of each senatorial senate and assembly district (240 individual scholarships), as well as 400 at-large scholarships for the state. The intent of this original legislation was to increase the number of available scholarships each year ("The Hegland, Shell, Donahoe, and Donald Doyle Act," 1955).

**Narrative history from original to current:** The first time competitive state-based aid was recommended came in 1948 with the Strayer Committee Report on the Needs of California in Higher Education. This report proposed establishing competitive subsistence scholarships for individuals that demonstrated outstanding ability and were actually in need of financial aid (Strayer, 1948). Seven years after this report was published the Hegland-Shell-Donahoe and Donald Doyle Act was passed, in 1955, creating a competitive scholarship that would cover tuition and fees, but not subsistence needs (i.e. living expenses) ("The Hegland, Shell, Donahoe, and Donald Doyle Act," 1955). In 2000, when the Ortiz-Pacheco-Poochigian-Vasconcellos Cal Grant Act was passed it created the Competitive Cal Grant A & B programs as they are known today. Like Entitlement Awards, funding and amount allocation is decided by the annual budget act, currently AB No. 97 ("Budget Act of 2017," 2017). There have been additional legislative revisions to this and other Cal Grant programs which are summarized in the Appendix, table 4.

## **Cal Grant C**

#### *PROGRAM OVERVIEW:*

**Authorizing legislation (main):** 2000 Senate Bill No. 1644: Ortiz-Pacheco-Poochigian-Vasconcellos Cal Grant Act

**Program purpose and description:** Cal Grant C awards are to be used for occupational or technical training for a course of at least four months in duration and not to exceed two years. Grant money can be applied to tuition, fees and training-related costs. The total number of Cal Grant C awards is established in state law as the number awarded in the 2000-01 fiscal year, which was 7,761 awards (SB 1644, 2000).

**Eligibility determination and award process:** In addition to the general Cal Grant eligibility requirements, Cal Grant C applicants are recommended to submit their GPA, as this is a competitive scholarship, but there is no minimum GPA required.

*LEGISLATIVE HISTORY:*

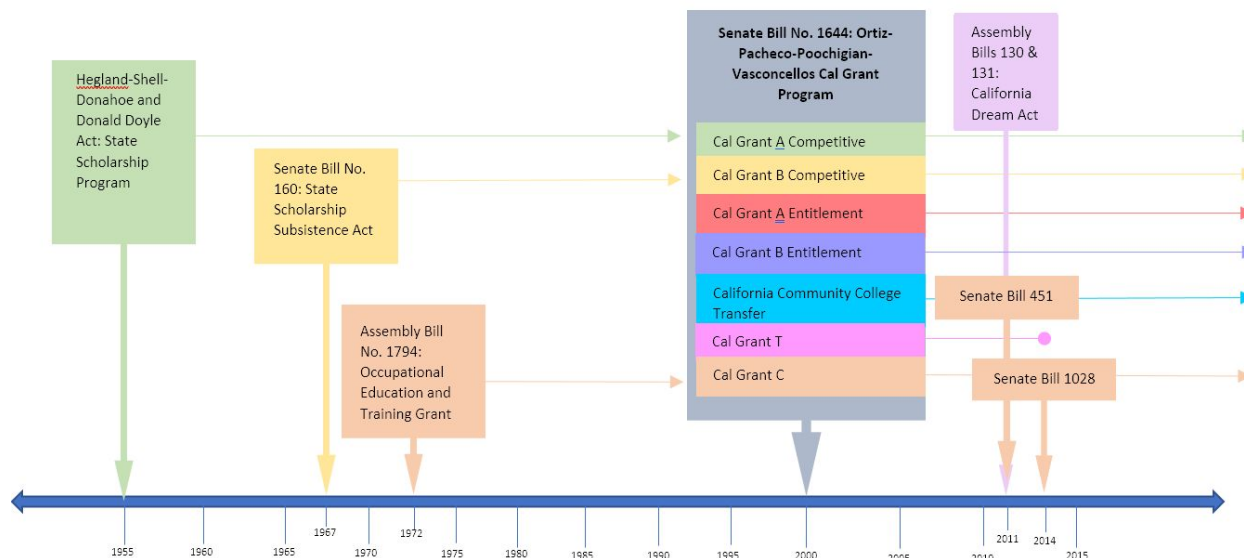
**Originating legislation:** 1972 Assembly Bill No. 1794

**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](#)).

**Narrative history from original to current:** In 1972, a pilot program was created with AB 1794 that established a fund to provide competitive scholarships for students pursuing occupational education and training. The original duration of this program was established to last until 1977 ([1972](#)). The Cal Grant C program was included in the 2000 legislation which determines the program structure as it exists today. In 2011, SB 451 was passed which requires CSAC to review every 5 years the eligible occupational and technical training programs for Cal Grant C. (SB 451, 2011) In 2014, SB 1028 amended the Unemployment Insurance Code, giving CSAC greater discretion in the weight it gives to applicants with specified challenges. Funding and amount allocation is decided by the annual budget act, currently AB No. 97 ("[Budget Act of 2017](#)," 2017). There have been additional legislative revisions to this and other Cal Grant programs which are summarized in the Appendix, table 4.



## Timeline of Legislation Authorizing Cal Grant Programs: 1955-2015



## Other Grant or Scholarship Programs

### California Dream Act

#### PROGRAM OVERVIEW:

**Authorizing legislation (main):** 2011 Assembly Bill 130: California Dream Act

**Program purpose and description:** While not a separate scholarship program, the California Dream Act established that a student who is not eligible to complete the Free Application for Federal Student Aid (FAFSA) due to their citizenship status in the United States can still apply for and be eligible for financial aid programs, including the Cal Grant Entitlement Awards. (“California Dream Act,” 2011).

**Eligibility determination:** In order to be eligible for exemption status a student must complete the Dream Act Application (CADAA) instead of the FAFSA. Once submitted the CADAA is then passed on to the colleges listed on the application so that the institution may award aid. The CADAA can also be used in lieu of a FAFSA application for students who wish to apply for Cal Grants and other state-based aid programs (“California Dream Act FAQ for Parents and Students,” 2017).

#### LEGISLATIVE HISTORY:

**Originating legislation:** 2001 Assembly Bill 540

**Original legislative intent:** Assembly Bill 540 amended the California Education Code to include section 68130.5. This section created the exemption of paying nonresident tuition for students and established the criteria a student must meet to be eligible for this exemption (“California Assembly Bill 540,” 2001). AB 540

also allows eligible non-citizens to apply for and receive Cal Grants, Chafee Grants, and the Middle Class Scholarship.

**Narrative history from original to current:** Following Assembly Bill 540 in 2001, both Assembly Bill 130 and 131 were passed in 2011. Assembly Bill 130 established the California Dream Act as it is known currently, while Assembly Bill 131 established the administrative requirements of postsecondary institutions and CSAC (California Assembly Bill 131, 2011). In 2014 Assembly Bill 2000 amended the Education Code to broaden the scope of who may qualify to be exempt from nonresident tuition. Previously, students were exempt if they had attended high school in California for 3 or more years. Now, students are exempt if they fulfill the above requirement or earned credits in a California high school equivalent to three or more years of high school and attended at least three years of elementary or secondary education in California (California Assembly Bill 2000, 2014).

## *California Middle Class Scholarship Program*

### *PROGRAM OVERVIEW:*

**Authorizing legislation (main):** 2013 Assembly Bill No. 94: Education finance: higher education.

**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 incomes and asset levels do not exceed \$150,000 (as of 2015-16), and who do not qualify for Cal Grant awards. The income and asset ceiling is adjusted annually to reflect increases to the cost of living. In its first year, award amounts covered up to 40 percent of tuition and fees.

**Eligibility determination and award process:** To be eligible for the scholarship, students must meet the annual household income and household asset level requirements. The maximum annual household income and household asset level is \$150,000 in the 2015-16 academic year, but the maximum income level and maximum household asset level will be adjusted yearly for awards issued starting in the 2016-17 academic year and in each subsequent year, according to adjustments 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, which requires that applicants be citizens of the United States or noncitizens eligible for financial aid; not incarcerated; not in default on any student loans; a resident of California as of high school graduation; and a high school graduate or equivalent. To apply, students must complete a FAFSA and maintain satisfactory academic progress (a 2.0 GPA), be enrolled at least part-time, and be pursuing their first bachelor's degree or enrolled in professional teacher training at an institution approved by the California Commission on Teacher Credentialing. In addition to students enrolled at CSUs and UCs, students enrolled in upper-division coursework in baccalaureate programs at community colleges are also eligible.

The award amount a student receives is determined by their annual household income and the amount of any other financial aid they receive. For each \$1000 the student's household income exceeds \$100,000, the percentage of tuition and fees covered by the scholarship decreases in increments of 0.6 percent to a minimum of 10 percent of tuition and fees covered. The minimum award amount is \$90 for full-time enrollment, if 10% of the student's tuition and fees is less than \$90. The program will be phased in over four years, with the maximum award amount in 2014-15 starting at 35 percent of the total scholarship amount the student would otherwise receive, and increasing to 50 percent in 2015-16 and 75 percent in 2016-17. Students may renew their award for the equivalent of four years of full-time attendance at their undergraduate program (or for community college students in baccalaureate programs, two years of

upper-level coursework), though starting in 2016-17, the number of years that students will be eligible for grants depends on the student's education level within their program (California Education Code 700290.2, Article 22).

*LEGISLATIVE HISTORY:*

**Originating legislation:** 2013 Assembly Bill No. 94: Education finance: higher education

**Original legislative intent:** The program aims to make higher education more affordable for middle-class California undergraduate students, who are not eligible for Cal Grants and are especially affected by rising tuition costs (California State Assembly Democratic Caucus, 2014).

**Narrative history from original to current:** The Middle Class Scholarship Program was established by Assembly Bill No. 94 (2013) in 2013. Senate Bill No. 103 (2015) required that CSAL annually adjust the annual income ceilings to reflect changes in the cost of living. In 2017, Governor Jerry Brown initially proposed to phase out the Middle Class Scholarship in his proposed budget (Brown, 2017), but later signed the 2017-18 Budget Act ("Budget Act of 2017," 2017) maintaining it.

## *California Chafee Grant*

*PROGRAM OVERVIEW:*

**Authorizing legislation (main):** H.R. 2873, or the Promoting Safe and Stable Families Amendments of 2001

**Program purpose and description:** The California Chafee Grant Program provides funds for youth 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: the federal government allots funds to each state based on the size of their foster youth population, and the state must match 20 percent of those funds. Federal funds allotted to states are made available for two years. States may also request additional funds, as well as release funds to be reallocated to other states if they determine that they will not spend their entire allocation. If states do not spend their entire allocation and do not release their funds to other states, they must return the unspent funds to the U.S. Treasury ("Promoting Safe and Stable Families Amendments of 2001," 2001). In California, the California Department of Social Services contracts with CSAC through an interagency agreement to administer the Chafee Grant program (California Department of Social Services, 2015). Although the program is not governed by higher education law, Chafee grants must be coordinated with other financial aid so that the total aid amount provided to students does not exceed their total cost of attending (Cochrane and Szabo-Kubitz, 2009).

**Eligibility determination and award process:** Eligibility for the program is determined by whether the student had been eligible for foster care between the ages of 16 and 18, and by their age when they apply. Foster youth age out of the foster care system when they turn 18. The Chafee Program, which includes Chafee Grants, is intended to provide services to former foster youth who have turned 18 but have not yet reached 21. However, students who have reached age 21 may stay eligible for renewal until they reach age 23 if they are enrolled in postsecondary education or a training program, and are on track to complete their program ("Promoting Safe and Stable Families Amendments of 2001," 2001). Students must also be enrolled at least half-time in an eligible college or career and technical school in a course of study at least one year long, and must maintain satisfactory academic progress (Chafee Grant Program Application, 2016).

To apply for a California Chafee grant, applicants must submit a FAFSA or a California Dream Act Application if they do not have a Social Security number. They must also submit a California Chafee Grant Application (“California Chafee Grant for Foster Youth,” 2015).

Students receive up to \$5000 a year for the cost of attendance, including tuition and fees, books, room and board, and other expenses, though the amount they receive may not exceed their cost of attendance (“Promoting Safe and Stable Families Amendments of 2001,” 2001).

*LEGISLATIVE HISTORY:*

**Originating legislation:** H.R. 2873, or the Promoting Safe and Stable Families Amendments of 2001

**Original legislative intent:** To assist foster youth aging out of the foster care system in their transition to self-sufficiency, through education, vocational training, health and financial services, and other supports.

**Narrative history from original to current:** Chafee Grants were established under a federal bill, H.R. 2873, or the Promoting Safe and Stable Families Amendments of 2001, which amended the Foster Care Independence Act of 1999. Section 477 of the Foster Care Independence Act is the John H. Chafee Foster Care Independence Program, which provides states with funding to assist foster youth aging out of the foster care system in their transition to self-sufficiency (“Foster Care Independence Act of 1999,” 1999). H.R. 2873 specifically amended the Foster Care Independence Act of 1999 by making vouchers for postsecondary education and training available to youths aging out of foster care (“Promoting Safe and Stable Families Amendments of 2001,” 2001). In 2016 California passed AB 2506, requiring that new Chafee Grants could only be used at institutions that also met Cal Grant eligibility standards.

## ***California National Guard Education Assistance Award Program (CNG EAAP)***

*PROGRAM OVERVIEW:*

**Authorizing legislation (main):** 2009 Senate Bill No. 647: California National Guard Education Assistance Award Program

**Program purpose and description:** The California National Guard Education Assistance Award Program provides educational assistance to members of the California National Guard. Members of the State Military Reserve and Naval Militia are also eligible.

**Eligibility determination and award process:** To be eligible to apply for the award, an individual must be a California resident (for over a year before applying), an active member of the National Guard, State Military Reserve, or Naval Militia who has served for at least two years, and be registered or enrolled at a Cal Grant-eligible postsecondary institution. In addition, the applicant must agree to use the award toward a postsecondary credential that they have not already attained, and must enroll in the equivalent of at least 3 academic units per semester (2009). To apply, applicants must fill out a FAFSA and submit an application to the Adjutant General, who commands the state’s National Guard. Awardees are selected on the basis of merit, not need: The Adjutant General selects award recipients based on both a consideration of the skills most needed by the National Guard and a consideration of the applicant’s ability, which is evaluated with reference to the applicant’s specific rank and occupation, an officer evaluation report, a recommendation

from the applicant's commander, any commendations received by the applicant, and an essay written by the applicant on the importance of education to him or her (2009).

CSAC issues award funding to recipients, and is then reimbursed by the Military Department through an interagency agreement. The number of awards each year is determined by the number authorized in the Budget Act, and cannot exceed 1000. The amounts of CNG EAAP awards are tied to the amounts of Cal Grant awards: those attending CSUs or UCs are awarded the maximum amount of a Cal Grant A award, and those attending private institutions are awarded the maximum amount of a Cal Grant A award for a UC student. Those using the award for graduate study may be awarded up to the maximum amount for a Cal Grant A award plus \$500 for materials such as textbooks, and those attending community colleges are awarded the maximum amount of a Cal Grant B award. The award amount may not cover more of the cost of the student's education than the amount left over after other financial aid is accounted for. Students cannot receive both a Cal Grant and the CNG EAAP at the same time. The award may be renewed for each academic year for up to four years of full-time enrollment or however long the applicant would be eligible for a Cal grant (2009).

*LEGISLATIVE HISTORY:*

**Originating legislation:** 2009 Senate Bill No. 647: California National Guard Education Assistance Award Program

**Original legislative intent:** The program is intended to boost retention of National Guard members, particularly "the most competent and capable members," as well as to encourage them to increase their capabilities by pursuing higher education (2009). More highly skilled members of the National Guard would contribute to a more skilled workforce in California in general, as National Guard members often hold civilian jobs. Higher retention rates would ultimately save money for the state of California, which must provide funding for each member of the National Guard, and would increase federal funding as well (2009).

**Narrative history from original to current:** The legislation originating the program was a Senate bill, SB 647, introduced in 2009, with National Guard members able to apply starting January 1 of the 2009-10 academic year.

As written, the program is scheduled to sunset on July 1, 2019. An analysis by the California Legislative Analyst's Office examined the program's effectiveness and recommended that the program be allowed to sunset, due to lack of participation and uncertain outcomes (Taylor, 2016).

## *Child Development Grant Program*

*PROGRAM OVERVIEW:*

**Authorizing legislation (main):** 2002 Assembly Bill No. 2811: Student financial aid: Child Development Teacher and Supervisor Grant Program

**Program purpose and description:** The Child Development Teacher and Supervisor Grant Program provides grants to students at California public or private two- or four-year institutions who intend to obtain a permit to teach or supervise in the field of child care and development at a licensed children's center (Cal. Education Code § 69620-69628).

**Eligibility determination and award process:** Students are nominated to the program by a Child Development Grant Coordinator, who may be a faculty or staff member at the student’s postsecondary institution (“Child Development Grant 2011-12 Nomination and Application Packet,” 2011). Coordinators may nominate as many students at the institution as qualify. To be nominated to the program, a student must be enrolled in a course of study that leads to a Child Development Permit at the Teacher, Master Teacher, Site Supervisor, or Program Director levels. (Child Development Permits are issued by the Commission on Teacher Credentialing and authorize an individual to serve in child care and development programs as an Assistant, Associate, Master Teacher, Site Supervisor, or Program Director [“Child Development Permits,” 2016].)

The grant program also includes contractual obligations for students after they have completed their course of study: applicants must agree to work full time in a licensed child care center for one year for each year that they receive the grant and to provide CSAC with verifying documentation.

Funding for the program comes from federal funds made available through the Child Development Block Grant Act of 1990 (P.L. 97-35). Up to 100 grants are awarded each year, or as many as are possible given the amount of federal funds. For students at four-year institutions who are enrolled at least half-time, the grant amount is \$2000 for each academic year, while for their counterparts at two-year institutions the grant amount is \$1000. Students may renew their grants for up to one additional year (Cal. Education Code § 69624).

*LEGISLATIVE HISTORY:*

**Originating legislation:** 1997 Assembly Bill No. 957

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

**Narrative history from original to current:** In 1997, via Assembly Bill No. 957, the Child Development Teacher and Supervisor Grant Program was established to replace the existing Child Development Teacher Loan Assumption program, which had been established in 1992. Although intended to attract students into the child care and development field, the loan assumption program suffered from low participation rates. CSAC, which sponsored AB 957, hoped that turning the loan assumption program into a grant program would attract more students into child care at about the same cost, as the grant program would provide awards in about the same amounts as the loans the previous program had assumed (1997).

The 1997 bill was written so that the program would sunset in 2002. Assembly Bill 2811 was enacted in 2002 to repeal the Child Development Teacher Loan Assumption program, extend the grant program indefinitely, and make several amendments to it (2002). However, beginning in 2017-18, the program will no longer offer new awards (“Child Development Grant Program,” 2012).

## *Law Enforcement Personnel Dependents Grant Program (Lepd)*

*PROGRAM OVERVIEW:*

**Authorizing legislation (main):** 1969 Assembly Bill No. 473

**Program purpose and description:** The Law Enforcement Personnel Dependents Grant Program (LEPD) offers scholarships to the spouses and children of California law enforcement officers who have been killed or totally disabled as a result of external violence or physical force in the line of duty. California firefighters,

as well as employees of the Department of Corrections and the Department of Youth Authority in California, are included along with law enforcement officers.

**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 two- or four-year postsecondary institution accredited by the Western Association of Schools and Colleges (WASC) (institutions that are candidates for accreditation by WASC also qualify) (“Law Enforcement Personnel Dependents (LEPD) Grant Program Fact Sheet,” 2006). In addition, the applicant must demonstrate financial need through the Student Aid Report generated by filling out a FAFSA form. To apply, applicants file an LEPD grant application and include documents to prove that they are eligible for the scholarship. These documents include the Student Aid Report; birth certificates, which are required for the children of law enforcement officers; and death certificates and other documentation necessary to show that the officer was killed or disabled by external violence or physical force in the performance of duty. Applicants must also prove, through findings of the Workers’ Compensation Appeals Board or other evidence, that the death or disability is compensable under Division 4.0 or 4.5 (starting with Section 6100) of the California Labor Code (“Law Enforcement Personnel Dependents (LEPD) Grant Program Fact Sheet,” 2006).

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

*LEGISLATIVE HISTORY:*

**Originating legislation:** 1969 Assembly Bill No. 473

**Original legislative intent:** To provide workmen’s compensation to the spouses and dependents of law enforcement officers killed in the line of duty.

**Narrative history from original to current:** Assembly Bill 473 added section 4709 to the California Labor Code in 1969 (1969).

## Loan Assumption Programs

### *Assumption Program Of Loans For Education (Aple)*

*PROGRAM OVERVIEW:*

**Authorizing legislation (main):** 1985 Senate Bill No. 1208

**Program purpose and description:** The Assumption Program of Loans for Education (APLE) is a state-funded, competitive loan forgiveness program for K-12 teachers and students training to become teachers. APLE consists of three distinct programs for slightly different populations: current participants, district interns, and credentialed teachers. District interns are those participating in an alternative certification program run by a public education entity, leading to a teaching credential (Cal. Education Code § 44381).

**Eligibility determination and award process:** To be eligible for the program, students must meet the following eligibility requirements throughout the payment period (Cal. Education Code § 69613):

- Be in a program leading to a teacher credential; one of the following:
  - Completed at least 60 units and enrolled in an academic program leading to a bachelor's degree at an eligible postsecondary institution
  - Participating in a teacher internship program
  - Admitted to a program of preparation approved by the Commission on Teacher Credentialing
- Must be admitted to or enrolled in the program at least half-time, and making satisfactory academic progress;
- Must have outstanding ability, as determined by GPA, test scores, faculty evaluations, and interviews;
- Must have received a loan under an approved educational loan program;
- Must agree to teach the equivalent of full-time for at least 4 consecutive years at an eligible school (includes schools that serve low-income or rural areas, are in the bottom two deciles on the Academic Performance Index, or have 20 percent or more of the teachers holding emergency-type teaching permits, such as a substitute teaching permit.)

For district interns to be eligible, they must have a bachelor's degree; have passed the California Basic Educational Skills Test (CBEST); have not defaulted on education loans or need to repay an educational grant; and have not completed coursework for an initial or specialist teaching credential ("Assumption Program of Loans For Education (APLE) for District Interns Fact Sheet," 2012). Credentialed teachers are eligible if they teach in a public school ranked in the lowest two deciles on the Academic Performance Index, possess a teaching credential, and did not apply for the program as an undergraduate. They agree to continue teaching at a school ranked in the lowest two deciles on the Academic Performance Index ("Assumption Program of Loans for Education APLE," 2012).

Applicants to the program are nominated for their awards: current students are nominated by their postsecondary institution, district interns are nominated by their district office, and credentialed teachers are nominated by their County Office of Education ("Assumption Program of Loans for Education APLE," 2012). Applicants submit applications to a coordinator at their respective nominating bodies, which then review the applications for eligibility and completeness, rank them according to their own selection criteria, and submit selected applications to CSAC. Nominating bodies choose their own selection criteria; GPA and faculty recommendations are commonly used to determine rankings (California Student Aid Commission). CSAC then sends eligible nominees the loan assumption agreement, which the nominee must sign and return. For each school year, the commission assumes up to 6500 student loans, with priority given to applicants who have need-based federal loans and to those who have teaching credentials in science, mathematics, or special education. There is a cap of 100 loan assumption agreements for district interns and a cap of 400 for credentialed teachers.

Once a nominee has received the award, the loan assumption agreements begin to take effect once the student has begun his/her required four years of teaching. After the participant's first year of teaching, the commission will assume up to \$2000 of the individual's education loans; at the end of each subsequent year, the commission will assume up to an additional \$3000 of education loans per year, for a total loan assumption of up to \$11,000. Additional loans are assumed for participants who teach in particular subject areas at particular schools: an additional \$1000 per year of loans are assumed for those who teach mathematics, science, or special education in the lowest 60 percentile of Academic Performance Index rankings and those who teach in a school ranked in the lowest two deciles on the Academic Performance Index. With all additional benefits, the total possible loan assumption amount is \$19,000.

*LEGISLATIVE HISTORY:*



**Originating legislation:** 1985 Senate Bill No. 1208

**Original legislative intent:** The intent of the program is to address the problem of the shortage of high-quality teachers, especially in certain subject areas or in schools with fewer resources such as those serving rural or low-income areas. To address this problem, the program is designed to encourage postsecondary students to pursue education leading to teaching credentials, and to seek teaching jobs in low-income, failing, or rural schools, or in subject areas with severe teacher shortages.

**Narrative history from original to current:** The APLE is enshrined in Article 5, sections 69612 through 69615.8 of the California Education Code. Legislation focused on providing grants to teachers was introduced in 1983 via Senate Bill No. 813, the Hughes-Hard Educational Reform Act of 1983 (California State Department of Education, 1983). Later bills, 1985 Senate Bill No. 1208 and 1986 Assembly Bill 3263, shifted the focus from credentialed teachers to those intending to attain teaching credentials in areas with teacher shortages (1985; California Student Aid Commission). Additional amendments were made in later years to increase the number of APLE agreements awarded, from 400 to 4500 (1998 Senate Bill No. 1564), then to 5500 (1999 Assembly Bill No. 1118), and finally to 6500 (2000 Senate Bill No. 1666) (California Student Aid Commission). 2000 Senate Bill No. 1666 made numerous other changes to the APLE, including increases in the maximum benefit amount from \$8000 to \$11,000 and the years participants are required to teach (from 3 to 4), and designations of awards for out-of-state teachers, teaching in rural areas, and teaching in districts with a high proportion of teachers with emergency teaching permits (2000; California Student Aid Commission). An amendment in 2008 (Senate Bill No. 1158) changed the language of the code's legislative intent, adding a reference to the "rising costs of higher education, coupled with a shift in available financial aid from scholarships and grants to loans" and a mention of economically disadvantaged students to motivate the intent of the APLE (2008). As of the 2012-13 Budget Act, no new allocations have been made for the APLE program, though the statute still stands and existing participants still receive benefits ("Assumption Program of Loans for Education APLE," 2012; "Budget Act of 2013," 2013).

## *Graduate APLE*

### *PROGRAM OVERVIEW:*

**Authorizing legislation (main):** 1998 Senate Bill No. 1564

**Program purpose and description:** Like the APLE, the Graduate APLE is a state-funded, competitive loan forgiveness program for teachers and students training to become teachers, but unlike the APLE, the Graduate APLE focuses on graduate students in training to become faculty.

**Eligibility determination and award process:** To be eligible for the program, an applicant must:

- be a United States citizen or eligible noncitizen;
- be a California resident at an eligible institution;
- must have complied with Selective Service requirements;
- not have defaulted on any loans or need to repay any grants;
- be enrolled in or admitted to a graduate program that they will be enrolled in at least half-time and be making satisfactory academic progress;
- have completed a bachelor's degree or be enrolled in a program leading to a bachelor's or graduate degree;

- have received an eligible education loan (“State of California Graduate Assumption Program of Loans For Education (Graduate APLE) Application/Nomination Packet for academic year 2001-2002,” 2001).

Applicants must also agree to teach full-time for at least three consecutive years (or the equivalent) at one or more California postsecondary institutions in order to be awarded.

To apply, students must submit an application to a college official, such as a faculty member or administrator, who then completes the nomination form and forwards the application to CSAC. Awardees are nominated on the basis of their academic ability and financial need. Their academic ability may be determined by GPA, test scores, faculty evaluations, interviews, or recommendations. When CSAC receives the applications, the commission selects outstanding financially-needy applicants to award. CSAC awards warrants for the assumption of up to 500 loans in a year, and each student may receive only one warrant (Cal. Education Code § 69618-69619).

Once the student has received the award, the loan assumption agreements begin to take effect once the student has received their graduate degree from a participating institution, has taught full-time for one academic year (or the equivalent) at a regionally-accredited California college or university, and has redeemed his or her award. After each year of teaching, for up to three years, CSAC assumes up to \$2000 of the student’s outstanding education loans, for a total possible loan assumption of \$6000 (Cal. Education Code § 69618-69619).

*LEGISLATIVE HISTORY:*

**Originating legislation:** 1998 Senate Bill No. 1564

**Original legislative intent:** The program is intended to attract more students into graduate education in order to fill a growing need for new faculty caused by rising college enrollments and the retirement of existing faculty. In addition, it acknowledges the increase in the cost of higher education as a reason that students do not pursue graduate education.

**Narrative history from original to current:** The Graduate APLE is enshrined in Article 5.5, sections 69618 through 69619 of the California Education Code. It was established in 1998 by Senate Bill No. 1564 to replace the existing State Graduate Fellowship Program (1998). It was amended in 2000 and 2003. The 2000 amendment, enacted through Assembly Bill 2159, expanded the eligibility requirements to include California residents attending an eligible school outside the state, students enrolled in bachelor’s degree programs, and those enrolled at least half-time in their academic programs (2000). The 2003 amendment (A.B. 1754) prohibited warrants from being issued in 2003-04 (2003). Funding for the Graduate APLE, as with the APLE program, has not been included in the Budget Act as of 2012-13 (“Budget Act of 2013,” 2013).

## *State Nursing Assumption Program Of Loans For Education (Snapple)*

*PROGRAM OVERVIEW:*

**Authorizing legislation (main):** 2005 Senate Bill 63

**Program purpose and description:** The intended purpose of this program is to increase the number of nursing faculty members at California college and universities. The program will assume up to \$8,333 for each year that an individual has taught nursing studies at an accredited institution.

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

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

The applicant will also be evaluated on the following criteria before being accepted into the program:

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

Once meeting the above requirements and agreeing to teach for at least three years the individual will receive up to the annual award amount of \$8,333 (“California Senate Bill 63,” 2005).

*LEGISLATIVE HISTORY:*

**Originating legislation:** 2005 Senate Bill 63

**Original legislative intent:** Senate Bill 63 sought to encourage people to complete their graduate educations and serve as nursing faculty members at California postsecondary institutions (“California Senate Bill 63,” 2005).

**Narrative history from original to current:** SNAPLE is enshrined in Article 1, sections 70100 through 70110 of the California Education Code. The program was originally established in 2005 through Senate Bill No. 63, with an amendment made in 2006 (SB 1309) to allow undergraduate students to be eligible, and to allow those teaching part-time to be eligible for payments after they have worked the equivalent of three full-time academic years. In addition, SB 1309 established SNAPLE-NSF, specifically for nursing employees of certain state facilities; however, as of 2012 SNAPLE-NSF is considered to be an inactive program (“California Senate Bill 63,” 2005).

## *John R. Justice (JRJ) Program*

*PROGRAM OVERVIEW:*

**Authorizing legislation (main):** 2008 John R. Justice (JRJ) Prosecutors and Defenders Incentive Act (JRJ Act)

**Program purpose and description:** The 2008 JRJ Act established with U.S. Code §3797cc-21 provides loan repayment assistance for local, state, and federal public defenders and local and state prosecutors. The purpose of this program is to help retain public defenders and prosecutors as student loan debt is continually a main reason why attorneys leave positions in the public sector (“JRJ Act of 2008,” 2008). In California, this program is authorized by the California Governor’s Office of Emergency Services and administered by CSAC.

**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 default on any education loans. In 2016 the award amount for California was \$473 for each recipient (“John R. Justice Grant Program,” Cal OES).

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## Appendix Tables

**Table 1. Maximum Cal Grant awards by program and institution type, 2015-16**

	Public			Private			
	California Community College	California State University	University of California	Two-year, non-profit	Four-year, non-profit	Two-year, for-profit	Four-year, for-profit
Cal Grant Awards							
Cal Grant A	NA	\$5,472	\$12,192	NA	\$9,084	NA	\$4,000
Cal Grant B							
First-year recipients	\$1,796	\$1,796	\$1,796	\$1,796	\$1,796	\$1,796	\$1,796
Second to Fourth-year recipients	\$1,796	\$7,268	\$13,988	\$1,796	\$10,880	\$1,796	\$5,796
Cal Grant C Award							
tuition/fees	\$2,462	NA	NA	\$2,462	NA	\$2,462	\$2,462
books/supplies	\$547	NA	NA	\$547	NA	\$547	\$547

Source: California State Budget Act of 2015

**Table 2. Percentage of average total student expenses paid for by maximum Cal Grant awards, by institution type, living situation, and award type: 2015-16**

	Cal Grant B			Cal Grant C <sup>1</sup>
	Cal Grant A	First year	After first year	
Public institutions				
California Community College				
Living with family	NA	14.9	14.9	24.9
Living off campus	NA	9.4	9.4	15.7
California State University				
Living with family	33.6	11.0	44.6	NA
Living off campus	23.4	7.7	31.1	NA
Living on campus	23.3	7.6	30.9	NA
University of California				
Living with family	52.9	7.8	60.7	NA
Living off campus	40.4	6.0	46.4	NA
Living on campus	40.3	5.9	46.2	NA
Private, non-profit, four-year college				
Living with family	22.5	4.4	26.9	NA
Living off campus	19.2	3.8	22.9	NA
Living on campus	19.7	3.9	23.6	NA
Private, for-profit institutions				
Two-year college				
Living with family	NA	7.1	43.0	11.9
Living off campus	NA	5.5	33.6	9.3
Four-year college				
Living with family	16.0	7.2	23.2	12.0
Living off campus	12.5	5.6	18.1	9.4

Sources: California State Budget Act of 2015; California State University Schedule of Systemwide Fees 2015-16; University of California Office of the President Operating Budget 2015, 2015-16 Tuition and Fee Levels; National Center for Education Statistics, Digest of Education Statistics 2016 <sup>1</sup>Total award combines maximum awards for tuition/fees and books/supplies.

**Table 3. Number of undergraduate financial award recipients, total dollars awarded, and average award amounts by California Student Aid Commission-administered program: 2015-16**

	Number of recipients	Total dollars awarded	Average annual award, dollars
Cal Grant awards (entitlement and competitive) <sup>1</sup>			
Cal Grant A	111,678	1,050,575,000	9,407
Cal Grant B	209,598	802,632,000	3,829
Cal Grant C	6,939	4,724,000	681
Other grants			
Middle Class Scholarships	49,420	43,920,288	889
Child Development Teacher and Supervisor Grant Program	237	218,476	922
Law Enforcement Personnel Dependents Scholarships	16	92,075	5,794
California National Guard Education Assistance	395	2,445,161	6,190
Loan assumption programs			
Assumption Program of Loans for Education	4,598	14,800,000	3,219
State Nursing Assumption Program of Loans for Education	36	323,902	8,997

Source: National Association of State Student Grant & Aid Programs ([http://www.nassgap.org/survey/state\\_Data\\_check.asp](http://www.nassgap.org/survey/state_Data_check.asp))  
Includes recipients eligible through the California Dream Act

**Table 4. Adopted revisions to the Ortiz-Pacheco-Poochigian-Vasconcellos Cal Grant Program of 2000: 2003 through 2016**

Year adopted	Bill	Summary of revision	Cal Grants affected	Citation
2003	SB 728	Requires Cal Grant eligible institutions to resolve financial need conflict for applicants and recipients	All Cal Grants	California Senate Bill 728 (Scott, Chapter 339, Statutes of 2003)
2006	AB 2813	Eliminated eligibility criteria of dependency and independency and instead established that eligible students would be anyone who is not 28 years old or older by 12/31 or application year.	Cal Grant Entitlement for CCC transfer students	California Assembly Bill 2813 (De La Torre, Chapter 822, Statutes of 2006)
2006	SB 1383	Allows students to obtain their high school diploma by 12/31 of the academic year following their date of application and still be eligible	Cal Grant Entitlement Awards (A, B, and CCC transfer)	California Senate Bill 1383 (Ortiz, Chapter 652, Statutes of 2006)
2006	AB 840	Would require recipients to affirm in writing, under penalty of perjury, that they have met the specified requirements for eligibility. Would also select, at random, 10% of awardees and verify with institutions their eligibility standing.	Cal Grant Entitlement for CCC transfer students	California Assembly Bill 840 (Arambula, Chapter 43, Statutes of 2006)
2008	AB 2260	Allows a student to demonstrate attainment of a community college or college GPA of at least a 2.0 from any college, not just a CCC	Cal Grant B Competitive	California Assembly Bill 2260 (Committee on Higher Education, Chapter 235, Statutes of 2008)
2010	SB 1382	Deleted requirement that financial need calculation be consistent with methodology from the 2001-02 academic year.	All Cal Grants	California Senate Bill 1382 (Committee on Veterans Affairs, Chapter 113, Statutes of 2010)



Table 4. Adopted revisions to the Ortiz-Pacheco-Poohigian-Vasconcellos Cal Grant Program of 2000: 2003 through 2016 (cont'd)

<b>Year adopted</b>	<b>Bill</b>	<b>Summary of revision</b>	<b>Cal Grants affected</b>	<b>Citation</b>
2010	AB 2086	Redefines a qualifying institution. In addition to the previous requirements (Private or independent institution that participates in specified federal student aid programs, nonprofit institutions, and public postsecondary institutions) institutions must provide information on where to access CA license exam passage rates for specific undergraduate programs.	All Cal Grants	California Assembly Bill 2086 (Coto, Chapter 644, Statutes of 2009)
2011	SB 70	The maximum household income and asset levels of a renewing applicant would either be the adjusted household income and assets levels or the maximum household income and asset levels, whichever is greater. Institutions would also have to annually report enrollment, persistence, grad data, job placement, salary, and wage info.	All Cal Grants	California Senate Bill 70 (Committee on Budget and Fiscal Review, Chapter 7, Statutes of 2011)
2012	SB 1028	Schools that lose their eligibility status due to exceeding the 3-year cohort default rate or being below a 30% graduation rate may regain its eligibility in the year it satisfies requirements rather than the following academic year.	All Cal Grants	California Senate Bill 1028 (Committee on Budget and Fiscal Review, Chapter 575, Statutes of 2012)
2012	SB 1016	Set maximum tuition award amounts for Cal Grant A and B recipients at private for-profit and nonprofit institutions. Allows students who initially qualified for both a Cal Grant A and B and received a Cal Grant B to be awarded a renewal Cal Grant A if the recipient became ineligible for a Cal Grant B and still meets Cal Grant A criteria. Students must have also attended a CCC in the academic year preceding the academic year they will use their award.	Cal Grants A and B	California Senate Bill 1016 (Committee on Budget and Fiscal Review, Chapter 38, Statutes of 2012)

Table 4. Adopted revisions to the Ortiz-Pacheco-Poohigian-Vasconcellos Cal Grant Program of 2000: 2003 through 2016 (cont'd)

<b>Year adopted</b>	<b>Bill</b>	<b>Summary of revision</b>	<b>Cal Grants affected</b>	<b>Citation</b>
2014	AB 1590	Redefines eligibility of institutions from "participating in at least 2 of the following federal campus-based programs: federal Work Study, Perkins Loan Program, and the SEOGP" to "participating in at least 2 of the following federal programs: federal Work Study, Stafford Loan Program, and SEOGP." Redefines graduation rate to be "percentage of full-time, first-time degree or certificate seeking undergraduate students who graduate in 150% or less of expected time"	All Cal Grants	California Assembly Bill 1590 (Wieckowski, Chapter 667, Statutes 2014)
2016	SB 1314	Allows students to receive Cal Grants if they were enrolled in upper division coursework of a baccalaureate program at a community college	Cal Grants A and B	California Senate Bill 1314 (Block, Chapter 438, Statutes 2016)
2016	AB 1449	Exempts student from requirement of graduating from a California high school or equivalent if a student was a resident of the state on their 18th birthday.	Cal Grant Entitlement for CCC transfer students	California Assembly Bill 1449 (Lopez, Chapter 433, Statutes of 2016)