

Exhibit 17

Information Item

Presentation of a proposal for early financial aid outreach to low- and middle-income California families

At the November 2013 Commission meeting, Commissioner Harry Le Grande provided a briefing on a proposal for an outreach initiative to be undertaken by the Commission. The briefing is attached as Exhibit 17.1.

Rachelle Feldman, Assistant Vice Chancellor and Director, Financial Aid and Scholarships, University of California, Berkeley, prepared the proposal, and will be present at the February 20-21, 2014, meeting to discuss it.

Responsible Person(s): Ed Emerson, Chief
Strategic Policy, Media and Communications Division

Briefing for Vice Chancellor/Commissioner Harry Le Grande
re: Proposed new outreach initiative for CSAC

Executive Summary:

The California Student Aid Commission could, by using information from the California Franchise Tax Board, provide a targeted annual notice to families with school-aged children in California about their potential for financial aid resources and both the accessibility of a college education and the need to plan savings for college.

Background:

Higher education plays a key role in the economic and social success of both individuals and their communities. Studies have shown that early introduction into the possibility of college attendance makes a large difference in whether a student eventually chooses to apply for and attend college. Other studies show that filing a financial aid application increases the chance that students enroll in higher education. At the same time, families – perhaps especially those from low income background – can find the financial aid process and information about their eligibility for financial help confusing. Further the news is full of stories about loan debt and high college costs. This leads some families to opt out of the college going culture, because of their belief that college is financially out of reach.

The California Student Aid Commission has been central to the accessibility to higher education in California since 1955 with its vision “Toward a California that invests in educational opportunity, fosters an active, effective citizenry, and provides a higher quality of social and economic life for its citizens.” Since 1978 the commission has administered the California Student Opportunity and Access Program (Cal-SOAP) to improve information about postsecondary education and financial aid.

Proposal:

In order to create more college going culture among and raise the achievement level of low- and middle-income Californians, CSAC is uniquely positioned to provide early information and guidance on the affordability of a college education.

Utilizing income data from the California Franchise Tax Board, CSAC could directly mail each family in California who indicate they have dependents in the elementary and middle school age ranges a personalized notice about their potential financial aid eligibility. The notice would include (with appropriate disclaimers) a notice based upon current income/estimated asset levels “If your child were attending college this year...”:

- Expected Cal Grant Eligibility
- Expected Pell Grant Eligibility
- Expected Middle Class Scholarship Eligibility
- The current tuition/fee amounts at the University of California, California State University, and Community Colleges.
- Information on the basics of financial aid, encouraging college savings, and encouragement to take the right courses in middle and high school to be prepared for college.

In addition to opening eyes for low-income families that higher education is affordable, it can encourage middle income families to save – similar to how the periodic letter from the Social Security Agency helps individuals think about planning and saving for retirement. The letter can send the message “encourage your children to work hard at school and strive, because we are helping to make sure you can afford college!” Alternatively, a more generic letter encouraging college and with the information in the final bullet could be sent to all families with dependents in the age range. Future more sophisticated versions might include information about UC’s Blue and Gold program, and the Fee Grant/Waiver programs at CSUs and CCCs.

While costs for direct mail and administration of the interface from Franchise Tax Board and formulas for estimating eligibility would need to be absorbed, this California Student Aid Commission initiative has the potential to increase higher education participation across California which would potentially increase the tax base and revenue for the state and transform the lives of individuals, families, communities and California. This could help fulfill the mission and vision of the Commission and lead the nation!

Nov 19, 2013

Prepared by: R Feldman, UCB Financial Aid and Scholarships