

Exhibit 9

Information/Action Item

Update on Community College Transfer Cal Grant Entitlement Program

Staff reported on the Transfer Entitlement Cal Grant program at the February 19-20, 2015 Commission meeting. The following exhibit provides updates on previously reported data, and further discussion regarding the proposed updates to increase the pool of potentially eligible Transfer Entitlement students.

The Transfer Entitlement Program

Exhibit 9.1, the presentation entitled, “The Transfer Entitlement Program” provides a description of the Transfer Entitlement processes.

Maximizing outreach:

- A workgroup has been formed to discuss and plan maximum success for the Transfer Entitlement program based on the needs of students, the Commission, and institutions.
 - ✓ In this workgroup we have designed and implemented a flier, reached out to school counselors and sent out surveys to gain understanding about how Institutions assist transfer students. The flier is attached as Exhibit 9.2.
 - ✓ The workgroup also sent out a survey to gain general knowledge about how Institutions identify, provide outreach and inform transfer students.
- Program outreach and communication with students is important to the workgroup and vital to the success of the California Transfer Student.
 - ✓ A designated button on the CSAC homepage was created for the Transfer Entitlement program.
 - ✓ The new Transfer Entitlement Program – Cal Grant website page is intended to be a one-stop location where students can understand the Cal Grant Transfer Entitlement program requirements, application process and deadline to apply.
 - ✓ The new website page serves as a portal to the necessary application websites (FAFSA, Dream Act Application) as well as linking to the WebGrants for Students website.

Expanding Transfer program

1. Gap-year flexibility

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- ✓ In 2012, SB 1016 (Chapter 38, Statutes of 2012), the education budget trailer bill, added clarifying language to the Transfer Entitlement statute establishing a new requirement that a student had to attend a California community college in the academic year immediately preceding the academic year for which the Transfer Entitlement Cal Grant would be used. SB 1016, however, provided a limited exception allowing otherwise eligible students who attended a California community college in the 2011-12 academic year, to receive and use Transfer Entitlement awards for the 2012-13 and 2013-14 academic years.
- ✓ In many cases the gap-year students need to work, relocate or travel a distance for school, and therefore, may take time off from school.
- ✓ Students returning to school after some layoff will have gaps in attendance.
- ✓ Admission and enrollment caps also limit students from transferring the first year.
- ✓ In 2013-14, 2,280 additional Transfer Entitlement award offers were made due to the one-year gap-year provision.
- ✓ The workgroup supports amending the requirements to allow students one gap-year.

2. Modifying the age limit

- ✓ Increasing the age-cap from 27 to 30 could result in approximately 12,000 additional awards for 28 and 29 year old students as indicated in the Chart 1 below.

**Chart 1
Ineligible Transfer Entitlement Applicants Over 27 Years of Age**

Age	Count	Potential Awards (70% offer rate)
28	9,222	6,455
29	8,043	5,630
30	6,364	4,454
31	5,408	3,785
32	4,626	3,238
33	4,056	2,839
34	3,493	2,445
35	3,024	2,116
TOTAL	44,236	30,965

- ✓ Additional budget analysis would be needed to determine the increase in cost, based on a higher age-limit cap. A possible alternative would be to phase-in the increase in age over several years to limit the fiscal impact year-to-year.

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- ✓ Increasing the age limit is supported by the current workgroup.
- ✓ CSUs expressed that many of their transfer students are not eligible due to the current age limit and gap-year limitations.

Partner with admitting institutions

- ✓ Work with UC, CSU and private institutions to identify potential transfer students for earlier outreach about the Transfer Entitlement program.
- ✓ Possibly use available admission files in the Transfer Entitlement selection and verification process as outlined in Exhibit 9.1.

Staff will continue to gather and analyze data to determine if there are changes to recommend for Commission consideration.

Responsible Person(s): Catalina Mistler, Division Chief
Program Administration and Services Division

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Program Administration and Services Division

Transfer Entitlement Program

Transfer Entitlement Program (Transfer Entitlement)

Program Scope: *Under California Education Code Section 69436, students **transferring** from a **California Community College** to a **qualifying baccalaureate-degree granting institution**, who were not previously awarded a Cal Grant A or B at the time of high school graduation, may receive consideration for a California Community College Cal Grant Transfer Entitlement Cal Grant A or B award.*

Program Requirements

- **HS GRADUATION:** *graduated from a California high school or its equivalent after June 30, 2000*
- **CA RESIDENCY:** *was a California resident at the time of high school graduation*
- **AGE:** *is under the age of 27 at the time of the transfer*
- **TRANSFER:** *transfers to a qualifying baccalaureate-degree granting institution (BDGI) from a California Community college (CCC) during the award year*
- **FINANCIAL:** *has financial need*
- **MERIT:** *is academically eligible with a CCC GPA of 2.4 or higher*

Who are California's Transfer Students?

Based on Community College League of California's "Fast Facts 2015" report on 2013-14 Transfer students from California Community College.

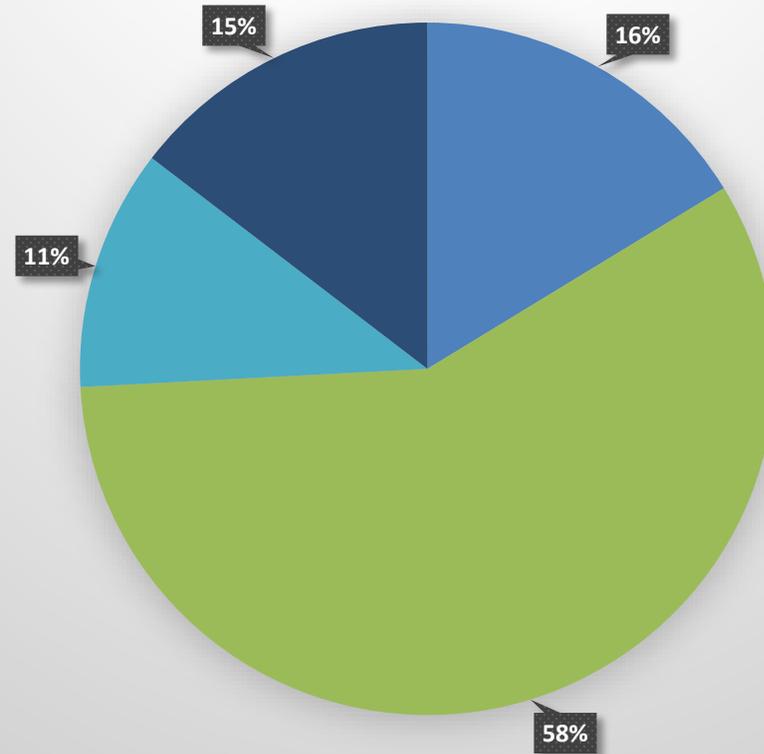
97,708 Transfers in the 2013-14 Year

CCC Students by Age, 2013-14

≤19	27.7%
20-24	37.8%
25-29	12.7%
30-34	6.6%
35 and Over	15.1%
Unknown	0.02%

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2013-14 Community College Transfers



UC - 15,896 CSU - 56,565 Private - 11,000 Out of State - 14,247

April 16-17, 2015

Which transfers are eligible for the Transfer Entitlement?

Community College League of California Fast Facts report on 2013-14 Transfer students from CCC.

- **97,708** transfer students
 - 14,427 will attend out of state schools
 - 23,000 (approximately) are age 30 over
- Eliminating the out of state and age 30 over group leaves about **60,000 – 75,000** potential Transfer Entitlement student from the remaining transfer population

How does CSAC determine the transferring CCC students for the Transfer Entitlement program?

Challenges:

- CSAC makes Transfer Entitlement awards in April/May prior to the June 1st student intent to register for UC and CSU to help with college choice
- CSAC does not receive data about incoming transfer students from institutions during awarding period
- FAFSA does not contain any data about new transfers
- CSAC must identify potential transfers through limited information and by filtering FAFSA/CADA applications and GPA information
- The 60,000 – 75,000 potential transfers will not all be Transfer Entitlement eligible due to the program requirements.

Transfer Entitlement Process - a series of steps

1. Application Edits
2. Financial Eligibility
3. Preliminary Notification
4. G6 Submission
5. Final award determination

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1. Application Edits

GDS system matches on-time FAFSA/CADA application with GPAs submitted by CCC then checks:

- 2.40 CCC GPA (*Merit requirement*)
 - List a BDGI on FAFSA or Dream Application
 - Not be over 27 years of age (*Age requirement*)
 - Enrollment file
 - Not a graduate student
 - Not have bachelor degree
 - Graduated after June 30, 2015 (*HS Grad requirement*)
- **Applicant is eliminated from Transfer Entitlement consideration if he/she doesn't meet these requirements**

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2. Financial Criteria

- Must meet income & asset ceiling criteria (*Financial requirement*)

2014-15 CAL GRANT PROGRAM INCOME CEILINGS		
	Cal Grant A and C	Cal Grant B
Dependent students and Independent students with dependents other than a spouse		
<u>Family size:</u>		
Six or more	\$101,000	\$55,500
Five	\$93,700	\$51,400
Four	\$87,400	\$45,900
Three	\$80,400	\$41,300
Two	\$78,500	\$36,700
Independent students		
Single, no dependents	\$32,000	\$32,000
Married, no other dependents	\$36,700	\$36,700

2014-15 CAL GRANT PROGRAM ASSET CEILINGS	
Dependent students ¹	\$67,600
Independent students	\$32,200

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3. Preliminary Notification

- CSAC does not know **CA residency status at the time of HS Graduation**
- Or
- **Transfer Status**

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- CSAC sends Transfer Entitlement Certification Process (G6) to remaining applicants to self-certify these requirements

4. G6 Submission

2. Print month and year of your high school graduation or the equivalent; or if you **did not** graduate High School or obtain the equivalent (GED or CHSPE) please write 'Did Not Graduate' and proceed to question #6:

Month Year

3. ONLY MARK THIS BOX IF you were a California resident at the time of high school graduation but graduated from a high school outside of California due to you or your parent or guardian's military orders from the United States Armed Forces. Otherwise, leave this box blank.

4. Print the name of the high school from which you graduated. If you completed high school by passing the GED or the California High School Proficiency Examination (CHSPE), please write 'GED' or 'CHSPE'.

High School Name or GED/CHSPE

5. Please print the City and State of the High School or if you completed high school by passing the GED/CHSPE, please enter the city and state of graduation or completion.

City State

6. Print the date you became a California resident, or if you applied through the Dream Act Application, print the date you started living in California: (if you were born in CA, enter your Date of Birth)

Day Month Year

7. Print the name of the College you are attending in the 2013-14 academic year.

2013-14 College of Attendance

8. Print the name of the College you plan to attend in the 2014-15 academic year.

2014-15 College of Attendance



Applicants have 30-45 days to respond



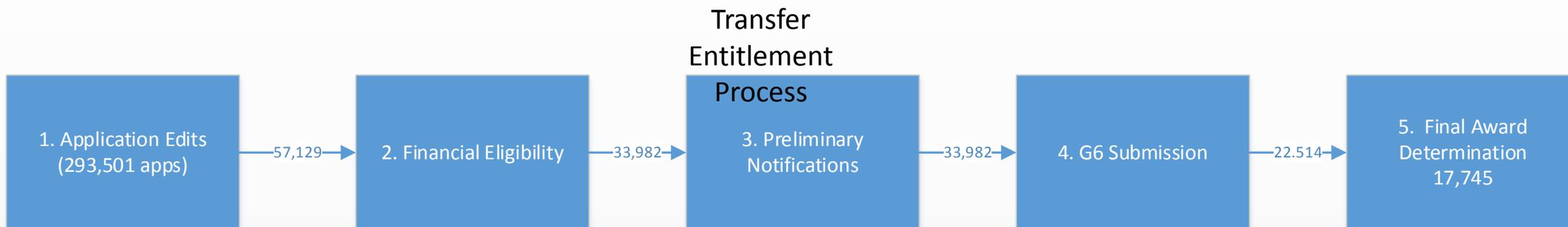
5. Final Award Determination

- G6 information processed
- Applicants who fail to correctly answer the G6 will be disqualified for a final award
- Applicants who meet requirements will then receive a California Aid Report

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Transfer Entitlement Process flow chart



Top reasons for not meeting application edits:

- Age 28 or over – 44,236
- HS Grad Edit - 56,822
- Not on enrollment file – 60,553
- Not on BDGI – 70,704

Transfer Entitlement Application & Award Statistics

Award Year	Sent	Returned	% Returned	Returned and Eligible	% Eligible (of Returned)	Total Paid	% Paid (of Returned and Eligible)
2010-11	23,075	13,635	59.1%	10,760	78.9%	9,444	87.8%
2011-12	28,115	17,664	62.8%	12,845	72.7%	11,173	87.0%
2012-13	51,239 ¹	27,097	52.9%	14,480	53.4%	12,629	87.2%
2013-14	50,416 ¹	28,301	56.1%	20,717 ²	73.2%	18,603	89.8%
2014-15	33,982	22,514	66.3%	17,745	78.8%	14,491	81.7%

¹ Enrollment files were not used.

² 2,280 additional awards from the gap year provision

Comparing Transfer Entitlements v. Potential Transfers

Award Year	Sent	Returned	% Returned	Returned and Eligible	% Eligible (of Returned)	Total Paid	% Paid (of Returned and Eligible)
2014-15	33,982	22,514	66.3%	17,745	78.8%	14,491	81.7%

- In 2014-15, CSAC sent 33,982 G6 forms, received 17,745 and paid 14,491.
- If 17,745 transfers received an Transfer Entitlement offer, what about the remaining potential transfer students identified earlier?
- Initial - 60,000 to 75,000, now 42,825 to 57,825 (minus the 17,745 Transfer Entitlement offers)

Comparing Transfer Entitlements v. Potential Transfers

- Initial - 60,000 to 75,000, now 42,825 to 57,825 (minus the 17,745 Transfer Entitlement offers)
- The remaining 42,825 to 57,825 may have been disqualified for:
 1. Age (about 17,200 students that are 28 or 29)
 2. Not CA resident at the time HS graduation
 3. Gap year between CCC attendance and transferring
 4. Missing GPA and/or FAFSA application
 5. Didn't complete G6
 6. Unaware of program