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Information Item

California Student Aid Commission

Executive Director's Report

Enclosed for review is a written report from the Executive Director of the California Student Aid Commission.

Responsible Person(s): Diana Fuentes-Michel
Executive Director



CALIFORNIA
STUDENT AID
COMMISSION

**Executive Director's Report
February, 2012**

Dear Commissioners,

The March 2nd deadline for filing for Cal Grant aid is quickly approaching. Thousands of high school seniors, returning college students and new college students are seeking financial assistance to pursue college and/or career education. This application year, the Commission initiated a link from the FAFSA website to the Commission's website to facilitate the completion of the Cal Grant application process by the submittal of a GPA. It is our hope that this new "bridge" to the Cal Grant process will make it easier for students to apply for Cal Grant. The Commission staff is also working with our Cash for College partners in sponsoring almost 700 workshops throughout the state to help students file the FAFSA and complete the GPA submittal process. Our business, community, education and Cal-SOAP partners are working hard to ensure that families, particularly first-generation and college students, know about the availability of all types of financial aid (federal, state, institutional and private aid) through the submittal of the FAFSA form. Following the March 2 deadline, Cash for College partners will be holding workshop sessions to help students and their families understand their financial aid letters and determine what college choice makes academic and financial sense. This assistance is particularly needed as students face the uncertainty of admission at the college of their first choice. Local options, like enrolling in a community college or state university, are not as certain as community colleges and CSU campuses face enrollment constraints.

In addition, the Commission staff has been working to identify those students whose Cal Grant aid was eliminated due to budget actions which required renewal Cal Grant recipients to meet income and asset ceilings as is the current process for new Cal Grant applicants. The Commission's policy of Cal Grant students being held to the same income and asset ceilings for the program (A or B programs) that they were initially paid under, is now being changed to allow Cal Grant B students to be held to Cal Grant A income and asset ceiling standards. This Cal Grant B to A switch is now being undertaken.

And finally, the Commission staff has worked over the last six weeks to produce a new Dream Act application for use in determining institutional aid for California Dream Act students attending the University of California, California State University and the State's community colleges. On February 4th, the Commission was the lead organization with the Cien Amigos, Latino Opportunity Project and the Mexican Consulate General of Northern California, to host "Steps to College, 2012". The university feria, which included financial aid workshops for filing a FAFSA or a Dream Act application, or help in assisting in immigration affairs, was attended by over 1,500 students and their families. Over 200 college and high school counselors, college outreach and admissions officers volunteered with students from local colleges and organizations like Dream, Develop, Do, to offer admissions, financial aid and immigration assistance. The Commission staff is working with other community, education and student groups on workshop activities for the Fall of 2012 in anticipation of the Cal Grant Dream Act application period.

The Governor presented his proposed 2012-13 Budget to the Legislature on January 5, 2012. The Commission staff has been analyzing the proposed changes to the Cal Grant Program, including:

raising the minimum Grade Point Average, reducing the maximum award at non-public institutions, phasing out of the Loan Assumption Programs, shifting Temporary Assistance for Needy Families (TANF) funds from the CalWorks program to the Cal Grant program, maintaining the institutional eligibility requirement Cohort Default Rate at 24.6 percent, and requiring Transfer Entitlement students to have attended a community college within the academic year before the award year. Staff's analysis is provided in Tab 5.

This coming week, the Commission will be hold a hearing on distance education which is included in your agenda materials. We will also be discussing the impact of the Governor's 2012-13 budget proposals and its impact on the Cal Grant and APLE loan forgiveness program for teachers. It has been a busy and productive month since we've last met.

Please see some of the highlights of our divisions' work and a report on the actions taken by the Commission at its last meeting.

COMMISSION PROGRAMS UPDATE

❖ Administration & External Affairs Division Update

2012-13 Budget

The Commission staff has been focused on analyzing the Governor's Proposed 2012-13 Budget changes to the Cal Grant and Loan Assumption Programs in preparation for the Commission meetings and Legislative budget hearings. The Assembly and Senate budget hearings are scheduled for March 7, 2012 and April 19, 2012, respectively.

Cash For College Workshops

California Cash for College workshops have been underway since the first week of January, with 675 scheduled workshops up to the March 2 Cal Grant deadline.

Seven regional Cash for College coalitions of high schools, colleges, community and business groups, 15 Cal-SOAP regions, and hundreds of high schools and campuses around the state have been working to assist high school seniors to complete the FAFSA.

ECMC is once again providing \$500,000 to fund the \$1,000 Cash for College scholarship incentive program to help students maximize their financial aid by attending a workshop and applying for a Cal Grant by the deadline. In addition, a new video contest scholarship was introduced to have students tell us why they apply for college financial aid and how they will apply themselves to their future in college and beyond. Scholarships will be announced in May, after the March 2 deadline.

2011-12 Arthur Marmaduke High School Counselor Award

Since 1985, the Commission has annually presented The Arthur Marmaduke Award to recognize one high school counselor who has demonstrated superior skills, dedication, and results helping students seek and receive financial aid. Arthur Marmaduke served as the Executive Director of the Commission for 25 years, and this honor was created to acknowledge his commitment to assisting students gain access to postsecondary education through the Commission's grant, scholarship and loan assumption programs.

Nominations from high school principals for the 2011-12 award are being accepted now through March 30, 2012.

❖ **Program Administration and Services Division Update**

2011-12 Cal Grant Term Advances

- The 2011-12 Cal Grant term advance payments continue to be issued at 50 percent of the previous year's reconciled term amount. Institutions are receiving supplemental disbursements within a week of the term advance after reconciling their eligible student payments in WebGrants. This term advance adjustment continues to assist in better reconciliation of the Cal Grant funds to provide more accurate expenditure data to the state's control agencies.

2012-13 Cal Grant Award Processing

- Initial processing of electronic and paper 2011-12 Cal Grant Grade Point Average (GPA) began in September 2011 and processing of the 2011-12 FAFSA forms began in January 2012.
- The first processing of the 2012-13 High School Entitlement Cal Grant award offers began this week and awards cycles will continue on a weekly basis. Awards are being processed under the current Cal Grant requirements and award amounts.
- Electronic California Aid Reports (CAR) are being sent to students who have email addresses and paper CARs to students without an email address.
- Institutions can now access 2012-13 WebGrants school rosters identifying the preliminary Cal Grant offers made to students.
- GPA webcast training sessions are being provided through February 2012. This training provides information on the electronic upload process for schools that use the paper GPA process.
- Commission staff is collaborating with other school districts to share the Non-SSN GPA model allowing schools to submit GPAs without using the social security number as a student identifier.

Support for Students and Parents

- On February 21, 2012, the Commission's Customer Relations Branch has extended its call center hours of operation from 8:00 a.m. to 4:45 p.m. to assist students and parents during the peak period of March 2 and to assist with other Cal Grant, Specialized Programs and various financial aid questions. The Commission will continue the extended hours through March 9, 2012.

Commission Training Events

- In January, Commission staff introduced the webinar training sessions for Cal Grant and Specialized Programs to be held throughout the 2012 calendar. The goal is to provide the necessary training to financial aid administrators, high school counselors and various college administrators to ensure appropriate administration of the Cal Grant and Specialized Programs.

- Commission staff provided the first Cal Grant 101 webinar on January 27, 2012 to 70 financial aid administrators from various segments. The majority of attendees rated the training webinar “Above Average” and encouraged staff to continue its plan on providing regular training sessions.

❖ **Information Technology (IT) Services Division Update**

The Dream Act Application is meant to serve AB 540 eligible students also eligible under the provisions of AB 130 and 131. The California Dream Act will be implemented in two phases. Phase I (2012-13) will provide two primary functions:

- An online application for students to enter and submit their information.
- A process to output the student's application data to California colleges in a format that nearly replicates the federal Institution Student Information Record (ISIR).

The online application is very similar to the FAFSA application and includes an Expected Family Contribution (EFC) calculator and enhanced logic (e.g. to identify the student's dependency status). The application emulates the federal FAFSA since the federal needs analysis methodology is mandated by state law.

The 2012-13 application is on schedule for an April 2 release date and has been demonstrated to CSAC staff and student groups. Staff has consulted with the public and private segments, student advocacy groups and high school counselors to gather information on how to present the Dream Act Application questions and supporting instructions to applicants as clearly and simply as possible. This April 2nd application is for public campus state funded assistance for the 2012-13 year.

The application will be housed at www.caldreamact.org. Institutions will download application data from the Commission's Web Grants System. Commission staff will hold webinars on the Dream Act Application process and include the application process in the annual high school counselor's workshops. Commission staff is developing written supporting documentation to aid colleges, high schools and advocacy groups in assisting student to complete the Dream Act Application.

Phase II of the Dream Act Application will be released in January 2013 for 2013-14 California financial aid including Cal Grants.

Phase II will add additional functionality to both the application and the Cal ISIR distribution and corrections process. The Commission will probably collect additional information such as actual SSN (if they have one), student and parent Individual Taxpayer Identification Number (ITIN) and student cell phone number.

The following chart provides an update on the Commission’s November 17-18, 2011, December 22, 2011 and January 26, 2012 meetings and its actions:

	ACTIONS TAKEN BY THE COMMISSION	STATUS UPDATE
1	<p>Designation of Commissioners as Directors of the EdFund Board At its November meeting, the Commission took action to designate the Commissioners as Directors of the EdFund Board.</p>	No action necessary.
2	<p>2011-12 CAL-SOAP Contracts On November 17th, the Commission authorized the Executive Director to execute the 2011-12 Cal-SOAP contracts totaling \$6,889,400 at the allocation levels recommended by Commission staff and authorized the Executive Director flexibility in allocating the increased funding of \$216,083 but with priority given to the greatest extent possible to providing services to students in the area previously served by the North Valley Cal-SOAP.</p>	<p>Staff is reviewing the following requests for funds and expects to issue contract amendments soon:</p> <ul style="list-style-type: none"> • A \$75,000 planning grant for the Sacramento Cal-SOAP to explore providing services to students previously served by the North Valley Cal-SOAP. • \$141,000 to fund 10 requests for \$14,100 each to provide supplemental services to students within existing Cal-SOAP projects.
3	<p>California Education Code Further Defining “Mandatory Systemwide Fees” to include Fees for “Tuition,” at Public Institutions At the November meeting, the Commission authorized staff to seek an additional 90-day extension of the emergency regulation and adopted the proposed regulation and accompanying documents, requested that the effective date of the regulations be the date of filing, and authorized staff to take the necessary steps to complete the regulatory process. Commissioner Conley opposed the action.</p>	The Commission received the additional 90-day extension of the emergency regulation. The Commission has also filed the Certificate of Completion with the Office of Administrative Law (OAL). Upon approval of the Certificate of Completion, the regular rulemaking process for this regulation will have been completed.
4	<p>Student Eligibility for California Community College Transfer Cal Grant Entitlement Program In November, the Commission took action to eliminate the Cal Grant Community College Transfer Entitlement Program’s continuous enrollment requirement between community college attendance and attendance at a four-year college. In addition, the Commission requested that staff provide a detailed recommendation as to the implementation of the Cal Grant Community College Transfer Entitlement Program policy change in the current year.</p>	Implementation of this policy is on hold pending the outcome of the budget process, as the Governor elevated the issue of the Commission’s new policy for awarding Transfer Entitlement Cal Grant awards to allow otherwise eligible students to qualify for these awards without having attended a community college within the academic year before the award year to the legislative arena and expanded it into a budget issue.
5	<p>Designating Commissioner(s) as Director(s) of the EdFund Board At the December 22nd meeting, the Commission designated Commissioners Garcia Vasquez, Moore, Shah, and Siqueiros, and any other subsequently appointed Commissioners, as Director(s) on the EdFund Board of Directors.</p>	No action necessary.
6	<p>2011-12 Budget and Governor’s Proposed 2012-13 Budget At its January 26, 2012 meeting, the Commission adopted the following resolution: <i>“The California Student Aid Commission sees higher education as an investment in California’s future. Education is the economic imperative of our time and the civil rights issue of our generation. Access to higher education is the basis for the formation of our democratic society. As the stewards of access to opportunity for higher education, we urge the Legislature to give the highest priority to students in the budget during this time of financial downturn.”</i></p>	Additional analysis of the Governor’s 2012-13 Budget proposals is provided in Tab 5.
7	<p>Commission Meeting Minutes On November 17th, the Commission approved the minutes of the August 11, 2011 meeting.</p>	The Commission Secretary has signed the approved meeting minutes.

	ACTIONS TAKEN BY THE COMMISSION	STATUS UPDATE
8	Commission Meeting Calendar On November 17 th , the Commission approved the 2012 Commission meeting calendar.	No action necessary.

I have included for your information the following reports:

- a. California Student Opportunity and Access Program (Cal-SOAP) Project Directors' Report (Oral Report); and
- b. ECMC report on the status of the transition of the federal student loan guaranty program will be sent under separate cover.

I look forward to seeing you at our February meeting which will be held at the State Capitol Building.

Sincerely,

Diana Fuentes-Michel
1975-1979 Cal Grant B Recipient
1979 Graduate of Loyola Marymount University

Tab 3.b

Ref #	Details	Description
6	<p>Health and safety support and building security support</p> <p>Two guards 16 hours overnight 365.</p> <p>ECMC is responsible for reimbursement of the guards not for overall security of the facility.</p>	<p>Outside Services expense: Allied Barton Security Services Payments</p>
7	<p>Use of board room/meeting rooms with audio/visual capability and technical support.</p> <p>Will provide space that can accommodate the California Open Meeting Rules. The CSAC Commission meetings 4 times/year.</p>	<p>Rent payment to the City of Rancho Cordova.</p>
8	<p>Records retention, shred services, and property inventory services 15 months for:</p> <ul style="list-style-type: none"> • CSAC brought this in-house. Cintas (shred service) • ECMC staff support for oversight and management of services (200 hours) <p>TAB costs included</p>	<p>Record Storage Costs paid to Iron Mountain and Hours charged by CA Records staff directly supported these services.</p>
13	<p>CSAC Asset Inventory</p>	<p>No activity reported</p>

Tab 3.b

Ref #	Details	Status
17	<p>Provide a one-time security risk assessment of the Grant Delivery system to include scanning for security vulnerabilities and review of system logs for intrusion attempts.</p> <p>Contract services for an external provider to perform a security assessment — this does not include remediation of any issues found</p>	<p>Contract with NetSpi signed in December. Kickoff meeting with CSAC is scheduled to occur the week of January 16.</p>
19B	<p>Convert printing the Cal Grant Letters from the mainframe to an ASCII solution. To be completed prior to decommissioning the mainframe after the FAPS conversion.</p>	<p>No activity reported</p>
25	<p>Assist the Commission with obtaining training for more than 3,000 high school counselors and postsecondary educational institutional financial aid officers on the programs administered by the Commission.</p> <ul style="list-style-type: none"> • Produce 10-15 one to two minute video clips and integrate into CSAC systems • Produce 20-25 thirty minute to one hour training videos <p>Video production costs include:</p> <ul style="list-style-type: none"> • Preproduction Services: Script consultation, scriptwriting & production coordination • Field Production Services: Videographer, Field Producer, Broadcast quality digital camera • Post Production & Editing 	<p>No activity reported</p>

Tab 3.b

Ref #	Details	Status
26	<p>Providing the high school training materials. Composition, design, production, shipping and training for 19 locations</p> <p>There are 2 cycles for this publication in this operating agreement.</p> <p>Each cycle costs are reflected (need to plan for 2 cycles) books. This does not include shipping to the 19 locations. Shipping is included in #4.</p>	<p>Printing Costs</p> <p>Hours charged by CA Training staff directly supported this service (close out November workshops).</p>
28	<p>Support for Cash For College workshops</p>	<p>No activity reported</p>
29A	<p>Provide various collateral publications used to inform students, parents and counselors of state and federal financial aid programs.</p> <p>Publication estimate includes: College is Possible, Power of Education, Cal Grant Inserts.</p> <p>There are 2 cycles for these publications in this operating agreement. Based on the changes that CSAC anticipates they need to estimate a vendor cost.</p> <p>(Outsourced) <i>This cost is for copy and design only.</i></p>	<p>No activity reported</p>
29B	<p>Print the tax benefit one page flyer. This would be a two cycle project.</p> <p>(Outsourced) Costs are for each cycle. Need to plan for two cycles.</p> <p>No shipping/postage included because piece was delivered to CSAC last year.</p>	<p>No activity reported</p>

Tab 3.b

Ref #	Details	Status
30	<p>Fund Your Future: This includes copy, design, Spanish translation and printing of the Fund Your Future publication. Print estimates are based on the following quantities:</p> <ul style="list-style-type: none"> 550,000 English workbooks 132,000 Spanish workbooks 385,000 English brochures 90,000 Spanish brochures <p>ECMC will provide editing on the Federal information; this is included in the 1000 hours.</p> <p>CSAC will retain a vendor to create the publications, translate them and provide all fulfillment. Fulfillment costs are included in # 4.</p> <p>Outsource: Project oversight/ copy/ design/ layout/ stock photos</p>	<p>No activity for the new service period.</p> <p>ECMC ordered an additional 25,000 Spanish and 25,000 English brochures at CSAC's request with an expected delivery date of January 6.</p>
39	<p>High School Program Support originally described as "Conduct one major research project as designated by the Commission"</p> <p>ECMC staff support for high school workshops.</p>	<p>No activity this period. Costs to date represent shirts purchased for CA conference wear.</p>

Tab 3.b

Ref #	Details	Status
40	Provide as-needed services to align Commission administered programs with changes in Federal financial aid processes and procedures (such as changes arising from FAFSA form changes that impact Cal Grant processes) API Project	No activity reported.
42	CaliforniaColleges.edu sponsorship for CSAC	Charges incurred to date. None in December.
43	Pell Grant Table development	No activity reported.
44	Arthur Marmaduke High School Counselor Award in Spring 2012.	No activity reported
45	EdFund's EDD unemployment insurance invoices for 2011/2012	Insurance charges incurred to date.
47	Financial Aid APP for iPhone A generic questionnaire similar to that referenced above which would just provide questions and potential financial aid options without the ability to apply directly.	Hours charged by Marketing staff directly supported this effort.
48	CSAC migration from GroupWise/NDS to Exchange/AD GroupWise Support included in this item.	No activity reported.

Tab 3.b

Ref #	Details	Status
52	EdFund Board Professional Expenses	Legal Services in support of Board activities to date.
53A	GDS Changes for SB70	*Costs to be reallocated to last year service. Request submitted to ECMC Finance.
53B	APLE Programmer	No activity reported
54	Webmaster / CSAC website design services	No activity reported

Services Provided by ECMC Staff

Ref #	Details	Hours to Date	Status
1	Print letters, reports, and other program material	19.0 Hrs	General CSAC printing.
2	Receive and deliver mail, large parcels and packages for the Commission	71.25 Hrs	<p>Daily mail, parcel, and package delivery.</p> <ul style="list-style-type: none"> • Two Business Services staff pick up mail at the US Post Office and deliver to CSAC offices • Two internal mail runs are performed at CSAC offices (11:30am PT, 2:30pm PT) <p>Mail drop-off at the US Post Office at COB</p>

Tab 3.b

Ref #	Details	Hours to Date	Status
3	<p>Courier services for the Commission to the bank and the downtown area.</p> <p>CSAC to EdFund: 1 per day Downtown: twice daily</p>	269.50 Hrs	<p>Delivery charges incurred to date. General courier services.</p> <p>Two daily courier runs to pick up and drop off financial documents at the CA State Controller's Office and any other requested Downtown sites.</p>
4	<p>Storage of financial aid workbooks, brochures, fact sheets, guides, manuals, posters and videos</p> <p>Shipping to high schools and colleges (including collateral material, inventory and usage)</p>	183.75 Hrs	Hours charged by CA Corp Services staff supported this service.
5	Contract management (including, but not limited to: technology, web conferencing, recycle, confidential shred, building security system, storage and cubicle services)	.75 Hrs	Hours charged by CA Legal staff directly supported these services.

Ref #	Details	Hours to Date	Status
10	<p>Access to retrieve documents previously imaged</p> <p>Existing license and system</p> <p>Assumes VisiFlow system will be given back to CSAC upon conversion completion</p> <p>Current contract in place with Western Integrated that runs through 12/31/2013 for software maintenance.</p> <p>Cost additional effort for building a standalone server for VisiFlow imaging.</p> <ol style="list-style-type: none"> 1. Choose one of the existing machines - like VMServ-6 or VMServ-7 (R900) to repurpose as an ESXi server. 2. Order Large Capacity hard drives to house the data. 3. P2V NTStorage once EdFund's old data is removed or build new as a VM. 4. Configure ESXi server 5. Migrate 4 - VM's to the ESXi server. 6. Application Team to clean up any old data. 7. Create local CSAC accounts. 8. Remove the VM's from the corp.edfund.org domain. CSAC can join these servers to their domain. 9. Provide any existing VisiFlow documentation to CSAC. 10. Desktop Support to turn over the imaging stations and any supported documentation. 	0 Hrs	No activity reported.
11 A	<p>Estimated 800,000 paper applications and other documents to be imaged annually (such as paper GPA verification forms, the G-8 High School Graduation Certification Form, the Transfer Entitlement Certification Form and numerous Specialized Programs forms)</p> <p>CSAC estimates that annual imaging is closer to 200,000 and will decrease as certain items, such as APLE automation are completed during 11/12.</p>	511 Hrs	<p>26 boxes returned to CSAC in December.</p> <p>141 boxes returned to CSAC in 2011.</p>

Tab 3.b

Ref #	Details	Hours to Date	Status
11 B	<p>Backlog Imaging</p> <p>CSAC would like 250 of the remaining boxes of backlog imaging to be scanned.</p>	0 Hrs	<p>**Imaging inventory received by ECMC is not marked as backlog or not. Imaging team records all hours associated with the CSAC imaging to Service # 11A</p>
12	<p>Maintain and operate a Storage Area Network (SAN), which is architecture that allows remote computer storage devices to be attached to servers. This provides the server storage for the GDS system</p>	0 Hrs	No activity reported
14	<p>Software purchasing and contracting for imaging software, IVR, Oracle Data Base Management System (DBMS) software, and security software in support of the GDS system</p>	13 Hrs	<p>Hours charged directly supported this service, specifically Oracle contract review.</p>
15	<p>Backup database administration for the GDS to augment current Commission support</p> <p>Additional services include Oracle DBA support for upgrading and advanced tuning, and troubleshooting the production GDS databases</p>	0 Hrs	No activity reported
16	<p>When requested, provide needed expertise for support, troubleshooting or repair of GDS production networks, appliance, and firewalls – this service should not require more than 50 hours of support in a year</p>	0 Hrs	No activity reported

Tab 3.b

Ref #	Details	Hours to Date	Status
18	Provide Linux system administration and support for GDS servers located at OTS – this includes upgrading, patching, auditing, and ensuring optimal performance and security controls are in place	0 Hrs.	No activity reported
19A	Provide mainframe printing services for the Commission which includes changing and creating new overlays and letter formats for GDS letters – the Commission prints over 100 different GDS letter types (approximately 1.5 million letters a year) Hours to modify 50 letters and print all jobs	0 Hrs	No activity reported
20	Maintain the various ListServe accounts used by the Commission to distribute information to schools Current maintenance, training of CSAC staff on the current process and final transition of the application CSAC is in the process of transitioning this service in-house, these hours can be reduced.	0 Hrs	No activity reported
21	Programming and updating Student Expense and Resources Survey (SEARS) application software Transition support to CSAC	0 Hrs	No activity reported

Ref #	Details	Hours to Date	Status
22	<p>Provide Tier 1 Help Desk support for 400 postsecondary institutions, over 1800 high schools, over 300,000 student accounts on WebGrants for Students, and Commission staff – these calls are logged in the HEAT ticketing database and dispatched to appropriate Commission personnel for problem resolution</p> <p>Service labor hours—continue to use the CSAC HEAT system</p> <p>Due to CSAC call volume, 1.5 FTEs are required for 2011/2012 to accommodate peak call periods, while minimizing dropped calls.</p>	459.75 Hrs	<p>December 2011 statistics</p> <p>Total all CSAC Calls Received: 1335 Total all CSAC Calls Abandoned: 182</p> <p>Total tickets created by Helpdesk : 531 CSAC tickets resolved by ECMC: 495 CSAC tickets assigned to CSAC: 37</p>
23	<p>Provide all telephony services for the Commission, including but not limited to telephone installation, configuration, modification and hardware support for over 150 IVR telephone interfaces, telephone number assignments, voicemail, and toll-free line support</p> <p>CSAC has assigned internal staff to perform these functions, but would like to be able to request assistance in the unlikely event it is needed.</p>	0 Hrs	No activity reported
41	<p>Contracts owned by ECMC but are shared with CSAC</p> <p>See contract list, the items stated as ECMC ownership joint use by ECMC and CSAC</p>	.75 Hrs	Hours charged by Legal staff directly supported these services.
42	Project: CSAC SAN OS Upgrade (SAN Phase II)	133.50 Hrs	Completed Implementation on 12/17/11. Closed Project on 12/31/11.

Ref #	Details	Hours to Date	Status
48	CSAC Services - General <ul style="list-style-type: none"> • Customer Relationship Manager • Executive Support • Finance Support 	124.25 Hrs	Project Management and customer relationship support for CSAC Services. General management and support of CSAC Services.
55	Maintain edfund.org website. Updating of EdFund Board notices. Board Updates: 4 meetings/year + 4 amendments = 8 changes	0 Hrs	No activity this period.
49	Assist with filing IRS Form 990 for FY ending 9/30/2011 and FY ending 9/30/2012. Prepare, review, and file IRS Form 990 and associated state filings.	98 Hrs	Hours charged by CA Finance staff directly supported this service.
50	Support and review two EdFund audits for FY ending 9/30/2011 and FY ending 9/30/2012, prepare financial statement and audit report. EdFund financial statement required to prepare Form 990.	327.25 Hrs	Hours charged by CA Finance staff directly supported these services: <ul style="list-style-type: none"> • Continued work on the 2011 401K 5500 partial year return.

Tab 3.b

Ref #	Details	Hours to Date	Status
51	Maintain and manage EdFund Auxiliary Account and other EdFund financial activity.	164.25 Hrs	Hours charged by CA Finance staff directly supported these services.

While not part of any of the services listed above, an update on ECMC's funding of the Cal Grant Program is provided below:

October 5, 2011 = \$20,750,000 - paid

January 5, 2012 = \$20,750,000 - paid

Last payment is scheduled for April 5, 2012.