

California Student Aid Commission
Fiscal Operations
Timeline and Dashboard

In developing the timeline and reports on the Commission's fiscal operations, staff considered the following:

1. The State budgets on a July 1 thru June 30 fiscal year
2. Key dates in the State budgeting process are:
 - January 10: Governor's Proposed Budget released
 - Mid-May: Governor's May Revision to the Proposed Budget released
 - July 1: State Budget Enacted

Staff recommends reporting as follows:

January

- Report on the Governor's Proposed Budget for the next fiscal year:
 - Comparison of the Governor's Proposed Budget to the May Revision
 - Proposed significant adjustments affecting the Commission's programs and operations
 - Funding sources
 - Position authority

February

- Report on the Commission expenditures for the first two quarters of the current fiscal year:
 - Comparison of program and operational expenditures to their respective budget allocations
 - Projections for year-end expenditures
 - Significant budget variances

May

- Report on the Governor's May Revision for the next fiscal year:
 - Comparison of the Governor's Proposed Budget to the May Revision
 - Proposed significant adjustments affecting the Commission's programs and operations
 - Funding sources
 - Position authority
- Report on the Commission expenditures for the first three quarters of the current fiscal year:
 - Comparison of program and operational expenditures to their respective budget allocations
 - Projections for year-end expenditures
 - Significant budget variances

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July

- Report on the enacted State Budget for the new fiscal year:
 - Comparison of the State Budget for the new year to the prior year's budget
 - Significant adjustments that affect the Commission's programs and operations
 - Funding sources
 - Position authority

August

- Report on the Commission expenditures for the past fiscal year:
 - Comparison of program and operational expenditures to their respective budget allocations
 - Significant budget variances

California Student Aid Commission
 State Administered Financial Aid Programs
 Key Processing Timeline

January

- Next Budget Year
 - Finalize New Year Award Tables
 - Cal Grant New Application Process begins
 - All Specialized Programs: distribute application materials
 - Chafee: Online applications become available
 - Call Center Peak Period

- Current Year
 - Cal Grant:
 1. Spring term advances
 2. Mail year end withdrawal letters
 3. High school GPA upload training
 4. BCG/ACG Curriculum Development
 - Chafee: process spring term payments
 - Specialized Programs: process all program spring term payments
 - Grant Advisory Committee Meeting

- Prior Year
 - Track institution reconciliation payments
 - Send 30 day notice for unpaid reconciliation

February

- Next Budget Year
 - Cal Grant: begin processing E1 awards.
 - Cal Grant: notify FAFSA applicants of missing GPA
 - Prepare September 2 Community College GPA forms
 - Call Center Peak Period
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- Current Year
 - Cal Grant
 1. Provide training to institutions.
 2. On-going processes.

- Prior Year
 - Send 60 day notice for unpaid reconciliation

March

- Next Budget Year
 - Cal Grant: entitlement and competitive deadline (March 2)
 - Cal Grant Competitive (C1): set cut-off score for new awards
 - Post September 2 GPA form on Website
 - Call Center Peak Period

- Current Year
 - On-going processes.

- Prior Year
 - Send 90 day notice for unpaid reconciliation

California Student Aid Commission
 State Administered Financial Aid Programs
 Key Processing Timeline

April

- Next Budget Year
 - Cal Grant
 1. Process competitive award cycle
 2. Process transfer entitlement award cycle
 3. Mail G-6 Forms
 4. Prepare E1 reports for high schools regarding award offers for their seniors
 5. Send late GPA letter to students for appeal
 6. Mail competitive denial letters
- Current Year
 - On-going processes.
 - Cal Grant Admin. Scheduling and Curriculum Development
 - CCCSFAAA Spring Training Event
 - CSAC Training Academy Preparation
 - Internal Training
 - NACAC HS Financial Aid Fair
- Prior Year
 - Send 120 day notice for unpaid reconciliation

May

- Next Budget Year
 - Cal Grant
 1. Mail E1 Award Offer Report to high schools
 2. Send HS and Colleges high school graduation verification information
 3. Run E2 preliminary award selection and send G-6 to eligible
 4. Identify 2% percent for Cal Grant B new awards
 5. CSAC training academy begins
 6. Mail late GPA notification
 7. Schedule summer term payments.
 - Specialized Programs:
 1. Announce new Byrd recipients.
 2. Mail program renewal reports.
 3. Award new GEAR UP recipients.
- Current Year
 - Cal Grant: scheduling summer term payments.
 - APLE: distributing employment and loan forms.
 - On-going Processes.
 - Meetings
 1. Grant Advisory Committee

California Student Aid Commission
 State Administered Financial Aid Programs
 Key Processing Timeline

June

- Next Budget Year
 - Cal Grants:
 1. Process Cal Grant C Award Selection
 2. Award 2% Cal Grant Bs
 3. Process high school graduation verifications
 - Chafee: Renewal Award notification
 - SNAPLE: New award notification
 - Specialized programs: process renewal participants
- Current Year
 - Cal Grant summer advance
 - CSAC Training Academy
 - On-going processes.

July

- Next Budget Year
 - Review FAFSA draft
 - Run E2 Award Cycle
- Current Year
 - Process summer advance.
 - Send Pending Withdrawal School Rosters.
 - On-going processes.

August

- Next Budget Year
 - Cal Grant
 1. Updating system tables for Community College enrollment uploads
 2. Prepare fall advance payments
 3. Send missing graduation verification forms to students
 - Chafee: Stakeholders meeting with Department of Social Services
 1. Schedule fall term payments
 - APLE: Begin processing loan assumption payments
 - GEAR UP: Process Scholarshare Trust Award withdrawal requests
 - Other Specialized Programs: Process fall term payments
 - Prepare for Fall Workshops
 - Grant Advisory Committee Meeting
- Current Year
 - Cal Grant
 1. Mail pending withdrawal letters.
 2. On-going processes.

California Student Aid Commission
State Administered Financial Aid Programs
Key Processing Timeline

September

- Next Budget Year
 - Prepare Cal Grant March 2 GPA form

- Current Year
 - Cal Grant: Community College Competitive (C2) Award deadline
 1. Fall advance
 2. Run C2 Award Cycle
 3. Run supplemental C1 awards
 4. On-going processes.
 - School Support
 1. CSAC Training Academy
 2. CSU High School Counselor Workshops
 3. Fall Cal Grant Administrators Workshops
 4. Ad-hoc School Training
 5. Prepare for CCCSFAA/CASFAA Conference

October

- Next Budget Year
 - Cal Grant
 1. Prepare Student Expense Budgets
 2. Mail out Cal Grant GPA forms
 3. Update High School Indicator Table
 4. Fall Workshops

- Current Year
 - Cal Grant
 1. Process C2 Award Grant
 2. On-going processes.
 - Advisory Committee Meeting

November

- Next Budget Year
 - Cal Grant
 1. Mail Community College Reserve letters to students
 2. Begin GPA Upload Training
 3. Begin letter review for next award cycle.
 4. Update High School table with disadvantage high school information.
 5. Submit ISIR changes to IT for system modifications.
 6. Test program changes and award cycle process for new year.
 7. Post income and asset ceilings to tables.
 8. Update College Cost Estimates.

California Student Aid Commission
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 Key Processing Timeline

November Continued

- Current Year
 - Cal Grant
 1. Send out late fall advance payments.
 2. On-going processes.
 - Specialized: Process winter term payments
 - CCCCCSFAAA/CASFAA Booth and Conference Preparation
 - Proprietary Certification
 - Attend National Convening of Postsecondary Education Support Programs for Foster Youth

December

- Next Budget Year
 - High School GPA upload training.
- Current Year
 - Cal Grant
 1. Year End Reconciliation – invoice schools
 2. Run winter advances.
- Prior Year
 - Distribute final reconciliation letters

Monthly On-going

- Process Leave Of Absences
- Process School Changes
- Process appeals
- Process withdrawals and reinstatements
- Process Verification forms
- Process weekly payment runs
- Process manual payments
- Process abatements and re-issue payments
- Send Grant Operations Memos and Special Alerts
- Respond to policy and regulations inquiries
- Respond to correspondence
- Develop/amend program regulations
- Process new and renewal awards
- Training for institutions
- Internal training
- User Acceptance Testing

California Student Aid Commission
State Administered Financial Aid Programs
Dashboard

Staff recommends reporting the following data as indicated:

March

- ❖ GPA Upload Numbers
- ❖ High Schools not Using Electronic Upload Process
- ❖ Number of Paper GPAs
- ❖ Spring Advance Payment Totals

June

- ❖ Cal Grant E1 and C1 Award offers
- ❖ Total Projected Award Amounts
- ❖ G6 Process Update
- ❖ Chafee Award Update
- ❖ Status of Real-time Database Project

September

- ❖ Cal Grant E1, E2 and C1 Award offers Update
- ❖ Total Projected Award Amounts Update
- ❖ G6 Process Update
- ❖ Fall advance payment totals.
- ❖ Pending withdrawal letters update
- ❖ Cal Grant Student Expense budgets
- ❖ Cal Grant Selection Criteria
- ❖ Specialized Programs Awards Update
- ❖ Status of Real Time Database Project

December

- ❖ Cal Grant E1, E2 and C1 Award Update Compared to prior year
- ❖ Total Projected Award Amounts Update Compared to prior year
- ❖ Chafee New & Renewal Awards & Expenditures
- ❖ Specialized Programs Award Update
- ❖ Status of Real Time Database Project