

Item 16

Information Item

Update on Outreach plans for 2016-17

This item will discuss the recently announced federal changes in the financial aid process and the potential effects on the California Student Aid Commission (CSAC) 2016-17 outreach plans, and other key areas, and will update the list of outreach events undertaken by the Commission.

One of CSAC's roles is to provide financial aid program information and outreach services to various communities encouraging families to apply for financial aid and make college possible for their students. In addition to the outreach efforts, Commission staff offers Cal Grant, Specialized Programs, California Dream Act, Middle Class Scholarship and WebGrants training services to high school counselors, county and school district officials, college administrators, community organizations, and various state and county agencies.

To qualify for most federal and state financial aid programs, students must complete the Free Application for Federal Student Aid (FAFSA) or in California, the California Dream Act application for undocumented students. Each year beginning on January 1st, the FAFSA and California Dream Act Application become available for students to begin applying for the upcoming school year. Beginning in January, the Commission's Cash for College program provides workshops to assist families in filling out these applications. Over 800 workshops are scheduled and continue through the March 2 deadline. Considering the March 2 deadline for Cal Grants, Middle Class Scholarship and other institutional aid, students and their families currently only have 2 months to complete the applications, and even less time to learn whether they are eligible for Cal Grants and other financial aid and weigh their options among the colleges they may be able to afford.

Recently announced federal changes in the financial aid process, however, are designed to provide students and families with more time to complete the FAFSA, to learn whether they are eligible for financial aid, and to plan for paying for college. These federal changes will require significant changes in CSAC outreach and operations.

A. Federal FAFSA Changes affecting 2016-17 outreach plans

Many efforts have been made to streamline and simplify the FAFSA application process for students and families. One of the issues of filing the FAFSA or California Dream Act in January and February is that the prior year tax information is required which most families have not yet filed their income tax returns. Many families estimate their income tax information, but this requires them to have several financial documents available to accurately complete the applications. Time is a critical factor when submitting the FAFSA or California Dream Act because the application uses the latest income information submitted via income tax returns.

In a letter sent to Education Secretary Arne Duncan in June 2015, a group of U.S. Senators wrote that requiring students to provide tax information for the prior year has created a "highly disjointed process timeline" that especially harms low-income and first-generation students since many colleges require students to apply for federal aid before they are able to file their taxes for the previous year. Additionally, in September 2015, the White House stated that requiring students to wait until January slows down the aid process and makes it harder for prospective students to determine whether or not they can afford to go to college.

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In order to minimize this time crunch and FAFSA completion pressure, President Obama announced on September 14, 2015 that starting with the application for the 2017-18 school year, the FAFSA will use prior-prior year (PPY) income data and the application period will open on October 1, 2016. This means that students applying for the 2017-18 academic year will be able to complete a FAFSA as early as October 1, 2016 using 2015 tax data.

Starting next year, students will be able to:

- **Submit a FAFSA Earlier:** Students will be able to file a 2017-18 FAFSA as early as October 1, 2016 rather than beginning on January 1, 2017. The earlier submission date will be a permanent change, enabling students to complete and submit a FAFSA as early as October 1 every year.
- **Use Earlier Income Information:** Beginning with the 2017-18 FAFSA, students will report PPY – income information from an earlier tax year. For example, on the 2017-18 FAFSA, students (and parents, as appropriate) will report their 2015 income tax information, rather than their 2016 income information.

Table 1 provides a comparison of FAFSA key dates under the current structure and after the transition to PPY.

Table 1: FAFSA Key Date Comparison

When a Student Is Attending College (School Year)	When a Student Can Submit a FAFSA	Year Income Information is Required?
July 1, 2015 – June 30, 2016	January 1, 2015 – June 30, 2016	2014
July 1, 2016 – June 30, 2017	January 1, 2016 – June 30, 2017	2015*
July 1, 2017 – June 30, 2018	October 1, 2016 – June 30, 2018	2015*
July 1, 2018 – June 30, 2019	October 1, 2017 – June 30, 2019	2016

**Note that income from tax year 2015 will be used again for the 2017-18 academic year as it will be for the 2016-17 academic year.*

The move to using PPY tax data is expected to greatly streamline and simplify the FAFSA application process for students and families. Extending the application period by three months will enable and encourage more students to apply for aid. Students and families would have an more time to evaluate college affordability including tuition payment arrangements and to make more informed decisions among college choices. This change presents the CSAC with an opportunity to provide students and parents with earlier award offer notifications and to change the way in which awards are processed.

A staff internal workgroup has been formed consisting of the staff’s subject matter experts from the various units to assess the impact these FAFSA changes will have on CSAC processes and services provided to external stakeholders. Staff plans to solicit feedback from the external stakeholders on the effects of the new federal procedures after this CSAC self-assessment. Staff has presently identified that outreach and four other key areas, discussed below, will be affected.

1. Outreach & Training

Currently, High School Counselor Workshops occur in October and November. With the upcoming earlier FAFSA application process, staff may need to begin the high school counselor trainings in spring and continue them through the year. Earlier trainings may require

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staff to identify any potential FAFSA changes as the final FAFSA may not be available until October.

The Cash for College Workshops that are normally held between January 1st to March 2nd will need to coincide with the beginning of the application period. This means the workshop period will begin on October 1, 2016 and continue through March 2, 2017. In 2015, 804 workshops were held over the January 1-March 2 two-month period. With an additional three months added to the application period, there is potential for this number to increase significantly. This is an opportunity for CSAC to reach out to more students and families to inform them about financial aid, answer questions, and assist with completing applications.

The consortiums participating in the Commission's California Student Opportunity and Access Program (Cal-SOAP) also work directly with families and students in completing the FAFSA and California Dream Act applications. The 14 Cal-SOAP consortiums operating throughout California each have a Project Director and staff who work in conjunction with secondary schools, postsecondary schools, and community agencies to help carry out the goals of the Cal-SOAP program, which are to:

- Increase the availability of information to students about the existence of postsecondary education and the available resources of financial aid;
- Improve students' access to higher education by raising their achievement levels; and
- Reduce the duplication of services by coordinating outreach efforts.

Cal-SOAP Project Directors and staff will need to be aware of the FAFSA changes taking place so they are able to communicate these changes to the schools and students they serve. Cal-SOAP outreach efforts may need to be expanded and scheduled more appropriately. Staff will inform Cal-SOAP Project Directors of the proposed impact changes so they can assess the impact that PPY may have on their outreach services, if any.

Therefore, staff's 2016-17 outreach planning will now need to incorporate planning for the earlier availability of the FAFSA for the 2017-18 academic year.

2. Award Processing & Notification

At CSAC, the first entitlement awards (High School Entitlement - E1) would normally run in February with the start of the new application period. With the new October 1 date, Cal Grant awards could now be run in November (assuming CSAC can successfully retrieve Institutional Student Information Records (ISIRs) on October 1, 2016 from USDE). Students will benefit from the earlier Cal Grant award notification via the California Aid Report (CAR) which will come in advance of the college admission letters. With this paradigm shift, the CAR may need to be re-designed to provide more relevant communication and information to the student.

The earlier award processing also applies to the California College Community College Transfer Entitlement Program. Award processing can start as early as December or January versus the traditional May date. The earlier awards may effectively provide more outreach about the Transfer Entitlement Program. Since the Competitive Programs have set and limited awards, they may still have to be run after the March 2nd deadline to ensure all potentially eligible applicants receive an opportunity to compete for a Cal Grant award. Staff is exploring options to run competitive awards early as well. Barring any legislative or statutory change, the priority deadline of March 2nd will still be in effect. However, the earlier October 1st start date will expand the application window for Cal Grant consideration from two months

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to four months. Students who have traditionally missed the priority deadline will have more opportunities to submit a timely financial aid application.

Lastly, to accomplish earlier award processing, pertinent updates like the college cost estimates, income and asset ceilings and student expense budgets are required. Staff is uncertain when all of these will become available.

3. Grant Delivery System (GDS) & Programming

Federal Student Aid is planning to close out the 2015-2016 FAFSA cycle before beginning the 2017-2018 FAFSA cycle so that there are only two open years at one time. It is anticipated that this shutdown date will be September 10, 2016. CSAC may still need to build and administer three academic years at the same time and there is a possibility that these FAFSA changes will affect the GDS Modernization Project. Earlier and additional programming may be required to accommodate the October 1 date and subsequent award processes. This may re-prioritize other pending IT projects depending on the level of effort required.

4. California Dream Act Application

The availability of the California Dream Act application should align with the FAFSA. In order for this to happen, the California Dream Act enhancement schedule for IT programming will need to be moved up. Ideally, CSAC will have the enhancements complete and the ISIR record layout 60 days prior to the beginning of the application period to allow schools time for development. Therefore, if enhancements are to be completed by August 1, 2016, the Dream Act Enhancement Workgroup will need to convene as early as February of 2016 (all depending on when the 2017-18 FAFSA changes become available) to begin enhancement discussions related to the 2017-2018 California Dream Act application that would be released on October 1, 2016. Testing and development would be required during this period of time.

5. Program Administration and Services Division (PASD)

In addition to the resource needs of outreach and special programs, PASD staff will need to support the day-to-day operations while at the same time maintaining three academic years. The time period from September to December is especially busy. The weekly and monthly job-runs as well as the start-of-day reports will all need to be reviewed in order to determine what is needed and when, in light of the new application period. The data flip-over (to move current year ISIR data), which is normally done in December in preparation for the opening of the application period in January, will now need to be done prior to October 1, 2016. A new data table will need to be created to store ISIR data for the 2017-18 year and the Dream Act application and WebGrants will need to display and store information for 3 academic years. Furthermore, Dream Act application enhancements, testing, and programming will be very time consuming and need to occur earlier in the year than normal.

Overall communication with students will need to be increased and maintained over a longer period of time given the longer application period. The customer assistance call center will likely experience an increase in call volume beginning with the start of the new application period. Currently, call volume increases significantly beginning January 1 and remains high through March 2; the end of the application period. Call volume could remain high throughout the entirety of the new application period, but also likely is that with an additional three months to apply, calls will be more spread out over a wider timeframe. Regardless, the call volume will be closely monitored at that time to establish the true impact of the FAFSA PPY changes.

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The staff will continue to meet and evaluate the impact of the FAFSA PPY changes while aiming to develop a more concrete timeline and process flow, which also includes changes to the California Dream Act application which aligns with the FAFSA changes. This early filing process changes will impact the current processes in place for Cal Grants and the other Specialized Programs administered by the CSAC. Staff believes that this is a positive move towards simplifying the process and allowing families and students more time to apply and more time to make decisions and choices on where they can go to college.

Staff plans to schedule a series of meetings to consult with the segmental representatives and other external parties about the upcoming October 1, 2016 FAFSA release and how it affects them. We are hopeful that the meetings will help identify mutually beneficial changes in all of our procedures to best benefit the students.

B. Update on Outreach and Training Events

1. 2015 PASD Financial Aid Training Events

Commission staff has begun the 2015 financial aid training events for the 2016-17 application year. The Program Administration and Services Division staff participated in the following events, while managing their other workload:

- High School Counselor Workshops – In partnership with the California Association of Student Financial Aid Administrators (CASFAA), Commission staff have started the annual High School Counselors Workshops that are taking place across the state between October 14, 2015 and November 20, 2015. 13 out of the 21 workshop trainings have taken place so far. The workshops include information about Cal Grants, CA Dream Act Application and Middle Class Scholarship, and will highlight the resources available to assist high school counselors, advisors, and administrative staff.
- Webinars – Commission staff hosted 14 live, scheduled webinars for institutions. These webinars will continue through December 2015. Webinar topics include information about GPA Submission, WebGrants, Cal Grant, Middle Class Scholarship, Chafee, CA Dream Act, and Audit processes.
- Commission staff continues to conduct in-person training for teachers, counselors, community organizers, non-profits organizations, outreach workers and many others. Staff also continues to provide Cal Grant and GPA upload training geared toward school district officials, data managers, and district directors to help prepare them for the new electronic GPA uploading mandate. The recent training events have included:
 - Providing program training to community college financial aid staff at Chaffey College on September 18, 2015.
 - Providing Cal Grant training to high school counselors at the Center for Educational Partnership Counselor Breakfast on September 29, 2015.
 - Participating in a training at CSU Channel Islands on October 17, 2015. The workshop consisted of FAFSA, Dream Act, and Cal Grant training.
 - Providing training to IT and District staff on Cal Grants and GPA uploading on October 28, 2015.

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- Commission staff will provide training at the 2015 Annual CASFAA Conference in Sacramento on November 2nd. The training will include Cal Grant Program Compliance, Cal Grant Processing Updates, Dream Act, and WebGrants.

2. 2015 PASD Outreach Events

The Program Administration and Services Division coordinates the outreach programs and participates in several events, when available. Commission staff participated in the following outreach events:

- Participated in outreach to middle school and high school students called “Parents Making a Difference” on September 22, 2015 and September 24, 2015.
- Hosted an informational table at Woodcreek High School’s College Fair to assist students with questions about financial aid on September 23, 2015.
- Staffed an informational booth at the “Feria de Educacion” (hosted by CSU Sacramento) to assist Dreamers with financial aid questions on September 26, 2015.
- Division Chief Catalina Mistler was the keynote speaker at the “First Annual Pathways to Higher Education” in Jurupa Valley on September 26, 2015.
- Hosted an informational booth at Las Positas Community College’s Transfer Day to assist students with questions about financial aid on September 28, 2015.
- Staffed an informational booth at Career GPS on September 30, 2015 and October 1, 2015.
- Hosted an informational booth at the Aloha Festival and passed out financial aid information on October 3, 2015.
- Participated in Univision’s Phone Bank providing information to the callers regarding financial aid and the California Dream Act program on October 15, 2015.
- Hosted an informational table and participated in training at the Beyond the Dream Conference on October 17, 2015.
- Participated at the College & Career Fair at CSU San Bernardino on October 17, 2015 and presented Cal Grant and CA Dream Act information in one of the bilingual forums.
- Hosted an informational table at LA Cash for College on October 28 and 29, 2015.

3. California Cash for College

- Commission staff welcomed two new Regional Coordinating Organizations (RCO) for the Far North and Inland Empire regions to Cash for College effective October 1, 2015. Maral Hernandez from Inland Empire Economic Partnership and Elizabeth “Buffy” Tanner from College OPTIONS of UC Davis Educational Talent Search join the Cash for College team in time for the 2015-16 Cash for College workshop season.
- Commission staff worked in collaboration with Cash for College RCOs and internal departments to build system requirements for a new Cash for College portal.

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- The Cash for College Advisory Committee met to discuss this year's interim workshop registration process and to collaborate on system needs for the new program portal.
- Commission staff will participate in the 14th Annual College & Career Convention outreach event with RCO, UNITE-LA, on October 28-29, 2015. This event is a two-day college and career convention that features seminars, career demonstrations, financial aid presentations and scholarship information in an exhibit hall with college and university representatives from across the United States. The Commission will staff a table at the exhibit and provide financial aid information to students and participants.
- For the fifth year, Cash for College will also participate in the Steps to College Feria event scheduled for February 6, 2016, in partnership with the Consulate General of Mexico in Sacramento. This event reaches hundreds of low-income senior year students.
- More than 800 Cash for College Workshops will be conducted throughout California between January and March 2, 2016, to assist low-income and first generation students to complete the FAFSA and CA Dream Act Application.
- Cash for College RCOs will host a variety of outreach events in their regions to promote Workshops that start in January 2016.

The outreach and training events are held through the March 2 deadline and staff work to manage the coordination with our Cal-SOAP partners to participate in those events where Commission staff are unable to attend due to staffing or budget constraints. Many partnerships have been established through the years with various community organizations and programs, where training has been provided to allow these partners to train on the various Commission programs. Commission staff have also developed several training videos that are available to the public.

4. Strategic Policy, Communications and Media Relations (SPCMR) Community Relations Events

- Commission staff met with representatives from Regal Theatre and the Sacramento Kings to discuss the "Mission Possible" campaign to partner with movie theatres to share information regarding FAFSA completion with teens as part of their College Clubs.
- Commission staff received a presentation by the Community College Foundation's e-Bus, a fully-equipped mobile application station featuring 16 computers, 2 printers, 1 scanner.
- Commission staff began discussions with the Los Angeles City Housing Authority (LACHA) regarding providing FAFSA completion and Cal Grant information training to their Community Education Partners (CEP) comprised of Big Brothers, Big Sisters, the Los Angeles Police Department Employee's Association, Promise Kids, and others. The goal is to reach the residents of public housing to increase financial awards for higher education.
- The First in the World Grant partnership with the University of Southern California (USC) is proceeding with positive results. USC accepted the commission's recommendation for inclusion of UC Merced as a data collection and research partner. According to reports, California is the only state with a gaming-based research design and the U.S. Department of Education sees the success of our project as setting the tone for a national dialogue about using role-playing games to engage low-income and first-generation students in the college access and financial aid access. Project high schools have been selected:

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Sacramento, San Diego, and Long Beach Cal-SOAPs have received funding as a result of this grant.

5. SPCMR Federal Agency Collaborations

- Commission staff is working with the White House Initiative on Educational Excellence for African Americans and the University of California at Davis to prepare a Summit at the UC Davis campus in the spring of 2016.
- The Selective Service System partnership has resulted in the successful California Dream Act registration matching project and as of January 1, 2016, young men receiving a driver's license may "opt-in" to automatically register at the DMV.

6. SPCMR Legislative Collaborations

- Commission staff is participating in the Joint Rules Committee's statewide presentations to train district office staff regarding CSAC's programs and services.

7. SPCMR State Agency Collaborations

- Commission staff has met with the State Treasurer's staff regarding the California College Access Tax Credit Fund (CATCF). The two are working together to develop communications and marketing strategies for 2015 – 2018. We have successfully developed a College Access Tax Credit Fund mobile app. We conducted informational briefings to numerous media outlets.
- Commission staff participated in the State Controller's Financial Literacy Month information faire at the State Capitol along with numerous other state agencies and state officials.
- Commission staff participated in the California State Fair by providing an educational exhibit.
- Commission staff met with the California Department of Education to discuss strategies to increase financial aid information with public school students.

8. SPCMR Nonprofit Organization Collaborations

- Commission staff attended the KtoCollege event to honor the outgoing president of the California Teachers Association.
- Commission staff completed FAFSA/VITA cross-training pilot in San Francisco Bay Area with the United Way of the Bay Area. Continuing this important collaboration into the 2016-17 academic year.
- Commission staff established a relationship with WestEd, a non-profit organization that is engaging in the Green360 campaign to introduce more students to careers in green industries. Through a grant from the Public Utilities Commission and Pacific Gas and Electric, Green360 has developed a website called "Career Catalyst" that allows students to explore apprenticeships, internships, vocational, career and technical education pathways.

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- College Track has adopted Sacramento High School. Commission staff is working to provide students with financial aid information and GetSchooled.com information.
- The California Library Association and the Sacramento Public Library are considering partnering to train librarians and volunteers in FAFSA completion and financial aid information to support a public information campaign for the 2016-17 academic year.
- Commission staff participated in the 2015 National College Access Network's 20th Anniversary Conference to present with the Get Schooled Foundation and Univision about the AT&T "Text FAFSA" hotline campaign for the 2016-17 academic year.
- Commission staff participated in the California Association of African American Superintendents annual statewide meeting where we presented on financial aid.

Staff will provide the Commission with updates about the planning for the federal changes, including the consultation with the segments and other external parties, and outreach events..

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