Presidents/CEOs
Financial Aid Administrator

February 2008

Dear Financial Aid Administrator:

Thank you for your inquiry concerning participation in the Cal Grant Program administered by the California Student Aid Commission (Commission). The attached documents must be completed and submitted before your institution can be considered for participation. Each will require an original signature: the Institutional Participation Agreement (Agreement) must be signed by the institution's president/chancellor or CEO as reported to the Department of Education. All other documents may be signed by the Financial Aid Director/Administrator.

1. **Cal Grant Institutional Participation Agreement (Agreement)-** This Agreement serves as a contract between your institution and the Commission and clarifies a variety of Cal Grant Program areas. If the Agreement represents more than one campus/site/center/branch (campus), each location must be listed in *Article IX – Certification* (page 15 of the Agreement).

2. **Cal Grant Program School Information Survey-** This survey lists all Institution contacts, number of Cal Grant disbursements requested and frequency of disbursements. A separate survey must be submitted for every site/branch covered by the Agreement.

3. **Cal Grant Program Review Survey-** This survey provides an overview of your Institution and its existing financial aid practices. A separate survey must be submitted for every site/branch covered by the Agreement.

4. **Financial Aid Management Systems Survey-** This questionnaire helps the Commission determine the current financial aid systems/methodologies used by participating institutions.

5. **College Cost Estimate Form-** This form requests information regarding undergraduate and vocational/technical programs used to determine a student's cost of attendance at your campus. A separate College Cost Estimate Form is required for each qualifying course with unique costs offered at your campus.

6. **Contact Information Form-** Lists the names of key staff responsible for different aspects of administering the Cal Grant programs and disseminating pertinent program information.

7. **Information Security and Confidentiality Agreement-** Provides the names of staff agreeing to strict confidential treatment of Web Grants System and data.

CALIFORNIA STUDENT AID COMMISSION
Program Administration and Services Division

Mailing Address:
P.O. Box 419028
Rancho Cordova, CA 95741-9028

Street Address:
10811 International Drive, 2nd Floor

8. **System Administrator's Access Request Form-** Lists the names of staff to secure username and passwords for Web Grants access.

9. **Electronic Funds Transfer (EFT) Form-** This information allows institutions to receive advances electronically.

In addition, institutions must provide the following:

10. **Proof of Title IV participation-**
    a. A copy of your Program Participation Agreement (PPA), GAPS drawdown, or Fiscal Operations Report and Application to Participate (FISAP) Final Funding Authorization is sufficient for demonstrating allocation of funds **AND**

    b. Copies of accounting ledgers, student ledgers, and/or work study payroll statements are necessary to demonstrate distribution of Pell and two (2) of the three federal campus-based programs (FSEOG, Perkins, and FWS). We do not need the entire ledger, just a sampling of the Pell + 2 (please conceal SSN #s and addresses).

11. **Current Institution Catalog**- A copy of the institution's current campus catalog or a resource document describing the length of the course of study offered through the programs of study.

12. **Audited Financial Statements (A133)-** A copy of the institution's audited financial statements for at least the two (2) most recently completed fiscal years, including an audited balance sheet showing the financial condition of the Institution at the time of application (not applicable to public institutions).

13. **Financial Aid Disbursement and Refund Policies-** Documentation of how financial aid disbursements are made; approximately when they are disbursed; the office that does the disbursements; and how Cal Grant refunds are calculated. If this information is provided in the catalog (item #10), please indicate its location or provide copy. If not published, please document your current practice, forward a copy with your IPA application, and retain a copy for your financial aid office records.

The Commission will also use data available from the U.S. Department of Education (USDE) regarding your Title IV participation and eligibility, accreditation and state authorization, additional locations (if applicable), and school officials to determine your institution's eligibility to participate in the Cal Grant programs.

Please feel free to contact the School Support Services Branch at 1.888.294.0153, option #3, or via email schoolsupport@csac.ca.gov if you have questions regarding your application or require assistance in filling out the forms. We look forward to partnering with you in our endeavor to make higher education available to all eligible Californians.

Sincerely,

Jorge Cortez, Associate Analyst
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