March 2009

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 Cal Grant participation. Each will require an original signature. The Institutional Participation Agreement (IPA) must be signed by the institution's president/chancellor or CEO as reported to the U.S. Department of Education. All other documents may be signed by the Financial Aid Director/Administrator.

1. **Cal Grant Institutional Participation Agreement (IPA) -** This IPA serves as the contract between your institution and the Commission and clarifies a variety of Cal Grant Program areas. Please *initial* and *sign* as requested.

2. **Cal Grant Program Review Survey -** This survey provides an overview of your Institution and its existing financial aid practices.

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

4. **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 institution. A separate College Cost Estimate Form is required for each qualifying course with unique costs offered at your institution.

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

6. **Information Security and Confidentiality Agreement -** This form provides the names of staff agreeing to strict confidential treatment of Cal Grant Web Grants System and data.

7. **System Administrator's Access Request Form -** This form lists the names of staff to secure username and passwords for Cal Grant Web Grants access.

CALIFORNIA STUDENT AID COMMISSION
Program Administration and Services Division

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

Street Address:
10834 International Drive, 1st Floor

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

In addition, institutions must submit the following supporting documents:

9. **Verification of Title IV Receipt of Funds and Disbursement-**
   a. Verification of Title IV receipt of funds documents must demonstrate that the institution's main out-of-state institution has received from the U.S. Department of Education Title IV funding (Pell Grant **and** two of the three federal campus-based programs, Supplemental Educational Opportunity Grant, Perkins Loan, and Federal Work-Study [FWS]). Examples of Title IV funding verification documents include a copy of Final Funding Authorization form or Common Origination and Disbursement Report or Statement of Account.

   and,

   b. Disbursement documents must demonstrate that the institution's main out-of-state institution is disbursing those funds. Documents received substantiating disbursement include accounting ledgers or student ledgers, and/or FWS payroll statements verifying the main out-of-state institution disbursement of Pell Grant and two of the three federal campus-based programs (SEOG, Perkins Loan, and/or FWS).

   c. Each California additional location must submit a copy of accounting ledgers or student ledgers, and/or FWS payroll statements verifying each California additional location disbursement of Pell Grant and two of the three federal campus-based programs (SEOG, Perkins Loan, and/or FWS).

10. **Institution Catalog** - A copy of the California's additional location catalog describing the length of the course of study offered through the programs of study.

11. **Third-Party Financial -** A copy of the main out-of-state institution's audited financial statements for two most recently completed fiscal years.

12. **Financial Aid Disbursement Policy -** Documentation reflecting how financial aid disbursements at each California additional location are made such as a schedule when financial aid is disbursed to students. If this information is provided in the campus catalog, please mark that area for review.

13. **Institution's Refund Policy –** Establish and submit a written refund policy that includes the Cal Grant program(s). If a recipient withdraws, drops out or is expelled for a term for which a payment is made, calculate the refund based upon the institution's refund policy and determine the portion to be returned to the Commission on behalf of the State.

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The Commission will also use information collected from the U.S. Department of Education regarding your Title IV eligibility and status, accreditation, California additional locations (if applicable), and school officials to verify and determine the institution's eligibility to participate in the Cal Grant program(s).

Please contact Suzan Donald at sdonald@csac.ca.gov, or at (916) 464-6424 or Tae Kang at tkang@csac.ca.gov, or at (916) 464-7961 if you have questions regarding your application or require assistance in completing the forms. We look forward to partnering with you in our endeavor to make higher education available to all eligible Californians.

Sincerely,

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Gloria Falcon, Manager
Program Policy & Development Branch

Attachments: Cal Grant Institutional Participation Agreement (IPA)
Cal Grant Program Review Survey
Financial Aid Management Systems Survey
College Cost Estimate Form
Contact Information Form
Information Security and Confidentiality Agreement
System Administrator's Access Request Form
Electronic Funds Transfer (EFT) Form