



REQUEST FOR APPLICATIONS: CSAC RFA# 20-102

Child Savings Account Grant Program

Grant for Eligible Entities

Released October 8, 2020

Applications due on
November 20, 2020 by 3:00 p.m. Pacific Standard Time

Administered by the California Student Aid Commission
11040 White Rock Rd, Suite 100
Rancho Cordova, CA 95670

TABLE OF CONTENTS

I. OVERVIEW	3
Purpose.....	3
Background	3
II. PROGRAM DESCRIPTION	4
A. Grant Information.....	4-5
B. Eligibility Requirements / Qualifying Entities.....	5-8
C. Technical Assistance and Definitions.....	8-9
D. Allowable Activities and Costs.....	9
E. Non-allowable Activities and Costs.....	9-10
F. Questions to the Commission	10
III. ACCOUNTABILITY	10
A. Reporting and Collaboration Requirements.....	10-11
B. Program Deliverables.....	11-12
IV. APPLICATION PROCEDURES AND PROCESSES	12
A. Program Timeline.....	12
B. Application Due Date.....	13
C. Application Review	13
D. Application Scoring Rubrics.....	13
E. Application Format and Instructions.....	13
F. Incomplete and Late Applications	14
G. Appeals Process.....	14
V. GRANT AWARDS	14
A. Grant Award Notification	14
B. Assurances, Certifications, Terms, and Conditions	14-15
1. Assurances and Certifications	15
2. Terms and Conditions	15
C. Grant Funding.....	15
VI. APPLICATION COMPONENTS AND INSTRUCTIONS	15
A. Application Components.....	15-16
B. Application Instructions.....	16-23

I. OVERVIEW

Purpose

The California Student Aid Commission (Commission) is accepting grant applications from qualifying entities, including California local government agencies and nonprofit organizations, that sponsor or collaborate on one or more comprehensive citywide or regional child savings account programs. Following this competitive process, the Commission will provide funding for a grant period beginning upon the disbursement of funds from the Commission, which is anticipated to be on or about March 5, 2021. Funds shall be available for encumbrance or expenditure until June 30, 2022. Funds that will be awarded are available based on an eligible applicant's timely submitted and properly completed application and proposed budget. The total funds available for this grant program is ten million dollars (\$10,000,000).

The goal of this grant is to provide qualifying entities with funds for one of the following purposes:

- A. To initiate a new local child savings account program
- B. To expand an existing local child savings account program

Background

California Student Aid Commission

The Commission is a state government agency established in 1955 with the primary role to administer State-authorized student financial aid programs available to children attending all segments of postsecondary education in California. These programs include grant, scholarship, and loan assumption programs supported by the state and the federal government.

The Commission operates according to the following Mission and Vision statements:

Mission: *Making Education Beyond High School Financially Accessible to All Californians.*

Vision: *A California that invests in educational opportunity, fosters an active, effective citizenry, and provides a higher quality of social and economic life for its people.*

II. PROGRAM DESCRIPTION

A. Grant Information

The Child Savings Account Grant Program (CSA Grant Program) was enacted in the 2019-20 State Budget (Education Code Sections 70115-70115.2, added by Stats. 2019, Ch. 53, Sec. 18) to support local governments and nonprofit organizations that sponsor or collaborate on one or more comprehensive citywide or regional child savings account programs.

The intent of the CSA Grant Program is to support local governments and nonprofit organizations that sponsor or collaborate on one or more comprehensive citywide or regional child savings account programs.

The Budget Act of 2020 appropriates ten million dollars (\$10,000,000) in one-time General Fund dollars to the CSA Grant Program. The amount of each grant award shall be at a minimum, one hundred thousand dollars (\$100,000) of the ten million dollars (\$10,000,000):

1. Up to 74 percent or seven million four hundred thousand dollars (\$7,400,000) of the funding shall be used to initiate new local child savings account programs.
2. A minimum of 24 percent or two million four hundred thousand dollars (\$2,400,000) of the funding shall be used to expand existing local child savings account programs.
3. Two percent or two hundred thousand dollars (\$200,000) shall be used by the Commission to provide outreach and administration of the program, and to provide technical assistance to applicants.

The Commission has latitude to fund less than 74 percent to new programs and more than 24 percent to existing programs. The strength of the applications will be taken into consideration to fund the programs that provide evidence of sustainability and community support.

The Commission will provide funding for grant(s) pursuant to the CSA Grant Program for the period beginning on or about March 1, 2021 through June 30, 2022. Funds will be awarded based on an eligible applicant's timely submitted and properly completed application and proposed budget. The total funds available for this grant program is ten million dollars (\$10,000,000).

All applications for CSA Grant Program funding must specify, at a minimum:

1. The amount of grant dollars being requested over the period on or about March 5, 2021 – June 30, 2022.
2. The total number of children that would be served primarily, ages 0-10, by these grant dollars through Fiscal Year 2020-22.
3. The percentage of low-income families, as evidenced by [Free and Reduced Price Meals](#) data, residing in the community served by each participating entity.
4. A narrative including, but not limited to a) a detailed and effective plan to inform local families about the importance of establishing a college savings account and/or educate families about local college savings programs in operation or development; b) detailed plans to provide local families with college savings fiscal literacy assistance; c) a plan to establish a [college-going culture](#); d) a description of how the program will be sustained, or, for existing programs, how the program may be expanded.

Applications will be reviewed and scored according to these and other criteria specified in this Request for Applications (RFA), as described in Scoring Rubrics. Successful applicants may not be awarded the entire grant amount for which they have applied, but may receive a reduced amount, consistent with direction provided in subdivision (a) of Education Code Section 70115.1. The minimum grant award amount is one hundred thousand dollars (\$100,000).

The Commission reserves the right to adjust downward the grant award amount requested if the Commission determines the adjustment meets the requirements and intent of the statute.

B. Eligibility Requirements / [Qualifying Entities](#)

Applicants must be either local government or nonprofit organizations that sponsor or collaborate on one or more comprehensive citywide or regional [child savings account programs](#), and meet the following requirements under section (a) or (b):

- a. **“New Programs” – CSA programs that are in planning or under discussion, and do not have children enrolled in the program with open accounts at the time of the application submission.**

Pursuant to subdivisions (b)(1)(A) and (c)(1) of Education Code Section 70115.1, to be considered for a CSA award, a local government or nonprofit organization must meet the following minimum qualifications:

1. Not have a local child savings account program in operation or under development;
2. Seek the grant to establish a local child savings account program that primarily targets children who are 0 to 10 years of age, inclusive;
3. Develop a plan to augment funding it receives to provide continued financial support for its proposed program; and
4. Demonstrate how the proposed program will enroll eligible children into the program or that the program can automatically enroll eligible children.

Pursuant to subdivision (c)(2), priority will be given to applicants with no local child savings account programs in operation or under development who meet the qualifications as described above based on the following criteria. Each category will be scored separately based on information provided in the applications. The scoring process is explained in the Scoring Rubrics. Applications that meet the minimum requirements will be assessed and scored against other applications based on how well they meet the criteria.

1. The percentage of students in the local program's geographic region who are eligible to receive [free or reduced-price meals](#);
2. The lower average and median incomes of families living in the local program's geographic region;
3. The [college-going rates for students](#) in the local program's geographic region;
4. Secured funding, or planned funding, through local budget commitments, philanthropy, or other funding sources;
5. The number of children with access to a college savings account under the local program;
6. A long-term and fiscally sound plan to sustain its local program;
7. An effective plan to inform local families about the importance of establishing a college savings account, provide local families with college savings fiscal literacy assistance, and establish a [college-going culture](#);
8. A plan to invest a minimum of one hundred dollars (\$100), through a combination of initial deposits and incentive payments, into each college savings account opened under the local program.

b. **“Existing Programs” – CSA programs that are in operation and have children enrolled in the program with open accounts at the time of the application.**

Pursuant to subdivisions (b)(1)(B) and (d)(1) Education Code Section 70115.1, in order to be considered for a CSA Grant Program award, a local government or nonprofit organization must meet all of the following minimum qualifications. Each category will be scored separately based on information provided in the applications. An explanation of the scoring process is provided in the Scoring Rubrics. Applications that meet the minimum requirements will be assessed and scored against other applications based on how well they meet the criteria.

1. Operate a local child savings account program in operation that primarily serves children who are 0 to 10 years of age, inclusive.
2. Have secured funds in addition to grants received under this chapter, to support its program.
3. Demonstrate the capacity to enroll eligible children into the program or the ability to automatically enroll eligible children.
4. Describe how these funds will expand the existing program. Examples of expansion to include, but not be limited to any evidence of growth in the program, e.g., adding additional children, increasing incentives for families for participation, increasing the geographic region of service, offering additional services to participant families.

Pursuant to subdivision (d)(2), priority will be given to an entity with a local child savings account program in operation or under development meeting the qualifications described above based on the following criteria. Each category will be scored separately. An explanation of the scoring process is in the Scoring Rubrics. The Scoring Rubric will compare applications against one another and will be given scores based on how well they meet each criterion.

1. The percentages of students in the local program’s geographic region who are eligible to receive [free or reduced-price meals](#);
2. The lower average and median income levels of families living in the local program’s geographic region;
3. The [college-going rates](#) for students in the local program’s geographic region;
4. The funding secured through local budget commitments, philanthropy, or other funding sources;
5. The amount of funds saved for the local program;

6. The outreach events demonstrated by the applicant in its application to cultivate a [college-going culture](#) and encourage contributions to child savings accounts;
7. The ability to sustain and potentially expand its program;
8. A plan to invest a minimum of one hundred dollars (\$100.00), through a combination of initial deposits and incentive payments, into each child savings account opened under the local program.

C. Technical Assistance

The Commission encourages potential applicants to use the technical assistance made available by the Commission to develop their program proposal. Technical assistance available to applicants includes, but is not necessarily limited to:

1. A toolkit put together by Prosperity Now, for qualifying entities seeking to successfully launch a new local child savings account program; the toolkit is available at: <https://prosperitynow.org/csa-starter-kit>;
2. Participating in a work group to share best practices;
3. Attending the webinar by the Commission to respond to questions regarding the grant program; and
4. Additional resources available at: <https://www.csac.ca.gov/csa>.

Definitions

The Commission has established the following definitions:

1. **“Child savings account program”** means a comprehensive citywide or regional children’s savings account program that primarily targets children who are 0 to 10 years of age, inclusive.
2. **“Clear and significant progress”** given that this is a limited term program, it will be imperative to demonstrate a positive impact to the community served. This includes but is not limited to the following:
 - a. For New Programs, that they have made progress toward the goals to serve low-income children and families in geographic regions with low college going rates;
 - b. For Existing Programs, that they have increased their existing program, including how their services have expanded for low income children and families in geographic regions with low college going rates. This includes specifying any increase in the numbers of children served.

3. **"College-going culture"** refers to the environment, attitudes, and practices in schools and communities that encourage students and their families to obtain the information, tools, and perspective to enhance access to and success in post-secondary education.
4. **"College-going rates"** is the total percentage of California public high school completers who enrolled in any public or private postsecondary institution (in-state or out-of-state) within 12 or 16 months of completing high school, based on available report filters. To access data files, click here: <https://dq.cde.ca.gov/dataquest/>
5. **"Eligible for free and reduced-price meals"** are children whose families have incomes at or below 130 percent of the poverty level. To access data files, click here: <https://dq.cde.ca.gov/dataquest/>
6. **"Essential"** refers to a required expenditure to provide the means to administer the program as structured in Education Code 70115-70115.2.
7. **"Qualifying entity"** refers to local governments and nonprofit organizations that sponsor or collaborate on one or more comprehensive citywide or regional child savings account program.

D. Allowable Activities and Costs

Budgets for the use of grant funds will be reviewed and any items that are deemed non- allowable or exceed the limits set forth in the statute will be eliminated.

Allowable expenditures include funds to; provide seed funding for child savings accounts, administer the Child Savings Account Program, and provide outreach programs to build participation.

E. Non-allowable Activities and Costs

Funds provided under this grant may not be used for the following purposes:

1. Supplanting existing funding and efforts, including costs otherwise necessary to operate a child savings account program without this grant;
2. Acquiring equipment for administrative or personal use unless [essential](#) to the establishment or ongoing operation of a child savings account program;
3. Acquiring furniture (e.g., bookcases, chairs, desks, file cabinets, tables) unless essential to the establishment or ongoing operation of a child savings account program, or to provide reasonable accommodations to employees, interns, or volunteers with disabilities;

4. Purchasing food services/refreshments/banquets/meals;
5. Purchasing or renting space unless essential to the establishment or ongoing operation of a child savings account program;
6. Paying for memberships in professional organizations;
7. Purchasing promotional favors, such as bumper stickers, pencils, pens, or T-shirts, unless essential to the outreach activities;
8. Subscribing to journals or magazines; and
9. Traveling outside the State of California.

F. Questions to the Commission

Entities applying for Child Savings Account grant funding may submit questions about the application process or program requirements to the Commission.

All questions must be submitted via email to the Commission **no later than 3:00 p.m. PT on October 23, 2020**. The email address for questions is csa@csac.ca.gov.

Responses to all questions received will be publicly posted on the CSA website (<https://www.csac.ca.gov/csa>) by 5:00 p.m. PT on October 30, 2020.

III. ACCOUNTABILITY

A. Reporting and Collaboration Requirements

To ensure the successful implementation of the CSA Grant Program, grantees are required to submit the following reports to the Commission showing program activities that are proposed, in progress or completed:

1. An *Introductory Program Report*, describing the first six months of activities and how CSA Grant Program funds are spent by the grantees, due by September 6, 2021.
2. An *Annual Program Report* for each fiscal year in which CSA Grant Program funds are expended by the grantee, due by March 31, 2022 and March 31, 2024.

Grantees will also be required to engage in ongoing collaboration with the Commission, which may include, but may not be limited to:

1. Attending, in person or via telephone, regular meetings or conference calls to share progress updates on CSA program activities.
2. Assisting the Commission with disseminating resources and best practices on a statewide basis.

As part of carrying out its fiduciary responsibility to the taxpayers of the State of California, the Commission may perform compliance reviews of CSA Grant Program activities. Each awarded entity is required to provide information to the Commission upon request, including but not limited to accounting and budget documents.

B. Program Deliverables

Reports

Grantees must provide a summary of activities in the *Introductory Program Report* and the *Annual Program Reports* that includes, but is not limited to the following:

1. Demonstrate [clear and significant](#) progress toward meeting goals as stated in the CSA Grant Program application, to specifically describe how the criteria as required and noted above, have been met. The report must include a timeline of when the stated goals are expected to be achieved. Describe any challenges in meeting these goals.
2. The total dollar amount of CSA funds spent for one-time administrative costs to date.
3. The total dollar amount in all college savings accounts served by the program, including the amount contributed by funds from the entity, the amount contributed by grant funds from the CSA Program, and the amount contributed by family members or individual with accounts.
4. The total number of families served and the total number of participating children with a distinct individual college savings account opened in the child's name.
5. A summary of all marketing, outreach, and awareness efforts made by the grantee that are targeted at individuals and families intended to be served by the college savings program, including, but not limited to:
 - a. public and community events that raise awareness of the program;
 - b. communications via media, social media, and all other electronic and physical forms (such as flyers and brochures); and
 - c. direct outreach to individuals and families that may be eligible to participate in the program.

6. Recommendations for best practices that other entities—including nonprofit agencies, local governments, or the State of California—may wish to consider in developing, establishing, or operating a college savings program.

IV. APPLICATION PROCEDURES AND PROCESSES

A. Program Timeline

Activity	Due Date
RFA Release Date	October 8, 2020
Technical Assistance Webinar hosted by CSAC at 11 a.m. PT – visit https://www.csac.ca.gov/csa for more details.	October 16, 2020
Written RFA Questions Due to the Commission by 3:00 p.m. PT – email questions to csa@csac.ca.gov .	October 23, 2020
Commission Posts Responses to Questions on https://www.csac.ca.gov/csa .	October 30, 2020
Applications Due to the Commission	November 20, 2020
Mandatory Scoring Begins	November 23, 2020
Announce Preliminary Award Offers on https://www.csac.ca.gov/csa . Decision letters emailed to all applicants.	December 15, 2020
Notice to Accept and Appeals due to the Commission by 3:00 p.m. PT – email to csa@csac.ca.gov .	December 22, 2020
Commission Consideration of Appeals and of Awarding of Grants. <i>Note: January 2021 Commission meeting date will be posted in December 2020.</i>	Mid-January, 2021
Announce Approved CSA Grantees – visit https://www.csac.ca.gov/csa for updates.	Mid-January, 2021
Budget Narrative Revisions and Accounting Forms due to the Commission by 3:00 p.m. PT – email to csa@csac.ca.gov .	End of January, 2020
Completion of Contracts	February 26, 2021
Proposed Start of Grants	March 8, 2021
First Introductory Report Due to the Commission	September 6, 2021
Annual Program Reports Due to the Commission	March 31, 2022; March 31, 2023

B. Application Due Date

The CSA Grant Program application, all required forms, and all supporting documents *must be emailed to the Commission by 3:00 p.m. Pacific Time on November 20, 2020* to the following email address:

csa@csac.ca.gov

Subject line: CSA RFA #20-102 – “Applicant’s Name”

C. Application Review

Each application will be read and scored by a review panel. The review panel will be comprised of Commission staff. Application review will start on November 23, 2020.

D. Application Scoring Rubric

To learn how applications will be scored, please view the Scoring Rubrics file available at: <https://csac.ca.gov/csa>.

E. Application Format and Instructions

To be eligible to receive a grant award, all applicants must adhere to the required application formats, and must include as part of the application submission all requested information, completed forms, supporting documents, and attachments. The application must meet all the minimum requirements listed below. Applications that do not adhere to these requirements will not be scored or considered for funding.

1. One original e-signed CSA Grant Program application must be received at the Commission by 3:00 p.m. Pacific Time on **November 20, 2020**.
2. Application must be emailed to csa@csac.ca.gov.
3. All forms and supporting documents should be in one PDF file; following the specified order on the Checklist. Do **NOT** submit a folder with multiple files.
4. The application narrative must be typed using 12-point Arial font, double-spaced.
5. The narrative section is not to exceed ten (10) pages in length. Do **NOT** attach additional pages or information not requested in the application. Required forms and supporting documentation are to be included in the application package and will not count toward the 10-page limit of the narrative section.

F. Incomplete and Late Applications

Incomplete or late applications will not be scored or considered for funding.

G. Appeals Process

Applicants who wish to appeal a grant award decision must submit a letter of appeal to:

csa@csac.ca.gov

Subject line: CSA RFA #20-102 Appeal – “Applicant’s name”

The Commission must receive the letter of appeal, with an e-signature by an authorized person, by December 22, 2020 at 3 p.m. PST.

Appeals shall be limited to the grounds that the Commission failed to correctly apply the standards for reviewing the application as specified in this RFA. The applicant pursuing an appeal must file a detailed and complete written statement, including the issue(s) in dispute, the legal authority or other basis for the appeal position, and the remedy sought. The Commission will not consider incomplete or late appeals. The appeal may not contain any new information that was not originally contained in the applicant’s original application.

The Commission will consider the appeals during the January 2021 Commission meeting. That decision shall be the final administrative action afforded to the appeal.

V. GRANT AWARDS

A. Grant Award Notification

Applicants selected for funding will be sent a formal notification document from the Commission. Each grantee must sign and return the notification to the Commission before disbursement of funds can be made.

B. Assurances, Certifications, Terms, and Conditions

Assurances, certifications, terms, and conditions are requirements of applicants and grantees as a condition of receiving funds. The signed grant

application submitted to CSAC is a commitment to comply with the assurances, certifications, terms, and conditions associated with the grant.

1. Assurances and Certifications

Applicants do not need to sign and return the general assurances and certifications with the application. Instead, applicants must download assurances and certifications and keep these items on file and available for compliance reviews, complaint investigations, or audits.

2. Terms and Conditions

The grant award will be processed upon receipt of the signed notification document. The document must be signed by the applicant's chief executive officer or authorized designee and returned to the Commission within ten (10) business days.

All funds must be expended within the dates designated and for not more than the maximum amount indicated on the notification document. All funds must be expended or encumbered by June 30, 2022. No extensions of this grant will be allowed.

The budgets submitted by applicants must display two years of implementation (ending by June 30, 2022) showing how the grant will be used to support, develop, implement, and sustain the proposed college savings program. Proposed expenditures must demonstrate appropriate use of state funds.

C. Grant Funding

The grant will be disbursed on an annual basis beginning on or about March 1, 2021 and continuing until June 30, 2022, consistent with the budget provided as part of this RFA and the annual reports filed thereafter. It is the Commission's intent to disburse funds as needed and to avoid CSA Grant Program funds from being used by awardees to manage their general cash flow and budget concerns unrelated to CSA.

VI. APPLICATION COMPONENTS AND INSTRUCTIONS

A. Application Components

A complete application package must include the following components:

- Form A: Application Cover Page
- Form B: Application Proposal
- Form C: Application Narrative
- Form D: Required Data (1 of 2)
- Form D: Required Data (2 of 2)
- Form E: How Funding Will Be Used
- Form F: FY 2020-21 Grant Budget Narrative
- Form G: FY 2021-22 Grant Budget Narrative

B. Application Instructions

In order to be competitive, all applications must adhere to the required format and include all of the requested information and completed forms. Only complete applications will be considered for scoring.

Form A: Application Cover Page

1. Indicate if the Applicant is starting or planning to start a new child savings account program or has an existing child savings account program. Refer to section “Program Description”, item B.
2. Enter the date when the program was launched if the applicant has an existing child savings account program.
3. Enter the name of the program that is applying for the CSA Grant in “Applicant’s Name”.
4. Enter the “Employer Identification Number (EIN)”, also known as the “Federal Employer Identification Number” or “Federal Tax Identification Number. This is a unique nine-digit number assigned by the Internal Revenue Service (IRS) to business entities operating in the United States for the purposes of identification.
5. Enter the organization’s name that is associated with the EIN.
6. Enter the address of the organization that operates the program.
7. Enter the name, title, and contact information of the Executive Director or CEO, Program Director, and primary contact for CSAC, if not the Program Director; this could be the Program Coordinator.

Form B: Application Proposal

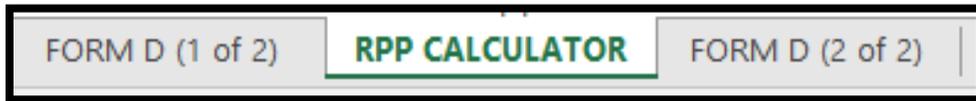
1. The application narrative must be typed using 12-point Arial font, double-spaced.
2. The proposal section is not to exceed two (2) pages.

Form C: Application Narrative

1. The application narrative must be typed using 12-point Arial font, double-spaced.
2. The narrative section is not to exceed ten (10) pages in length.
3. Required supporting documentation are to be included in the application package and will not count toward the 10-page limit of the narrative section.

Form D (1 of 2): Required Data

1. Section 1 – Amounts must be rounded up to the nearest dollar.
2. Section 2 – Include number of children of all ages that the program is serving or plan to serve.
3. Sections 3 & 4 – Do not enter incomes based on information entered on the “RPP Calculator”.
4. Go to the sheet “RPP Calculator”.



5. Before entering information into the first two green cells, applicant must visit the U.S. Census website to find the Mean and Median Incomes of families in the program’s geographic regions.

To find the mean and median incomes of families in the program's geographic region:

a) Click on the link:
<https://data.census.gov/cedsci/table?q=Income&tid=ACSST1Y2018.S1901&hidePreview=true>

b) Collapse the Labels "Total" and "Percent Allocated". Your label column should look like this:

Label
> Total
Median income (dollars)
Mean income (dollars)
> PERCENT ALLOCATED

- c) Click "Geographies".
I. Selection varied. Make selections that are appropriate to the program's geographic region.
- d) Click "Years"
I. Select "2018".
- e) Click "Hide"
I. De-select "Number", "Married-couple families", and "Nonfamily households".
- f) Your customized table should show the estimated Mean and Median incomes (dollars) for families in the program's geographic regions.

Families		
Label	Estimate	Margin of Error
> Total	79,241,578	±137,610
Median income (dollars)	76,401	±153
Mean income (dollars)	103,185	±230
> PERCENT ALLOCATED		

g) Print a copy of the customized table and attach to Form D. This will be your “supporting document”.

6. On the RPP Calculator, enter the Mean Income on F10 and Median Income on F11.
 - I. If the program covers multiple geographies, for example a program’s geographic region covers two school districts, use the average of all the mean income estimates as the Mean Income on F10. Use the average of all the median income estimates as the Median Income on F11.
 - II. Select Metropolitan Statistical Area (MSA) from the dropdown on E14.
 - III. Print a copy of the completed RPP Calculator and attach to Form D. This will be your “supporting document”.
7. Return to “Form D (1 of 2)”. You will find that Sections 3 & 4 have been completed.
8. Section 5 - Applicant must visit the CA Department of Education website to find the College-Going Rate for students in the program’s geographic region.

To find the College-Going Rate:
a) Click on the link: https://dq.cde.ca.gov/dataquest/
b) Filter the report to reflect the geographic region that the applicant is planning to serve or is serving.



- I. Select Level – Selection varied. Make selections that reflect the program’s geographic region.
 - II. Select Subject – Select “College-Going Rates” under Post-Secondary Education.
 - III. Select Submit – Click “Submit” button.
 - IV. Determine a time frame – Select “2017-18”.
 - V. Select Geographic Region – Selection varied. Make selections that reflect the program’s geographic region.
 - VI. Select a Report – Select “College-Going Rate for CA High School Students”.
 - VII. Find College-Going Rate under “Report Totals”.
- c) Print a copy of the page and attach to Form D. This will be your “supporting document”.
- d) Note: If the program covers multiple geographic regions, use the average of all the College-Going Rates as the percentage to enter on Form D, Section 5.
9. Section 6 - Applicant must visit the CA Department of Education website to find the Percentage of students eligible to receive [Free and Reduced-Price Meals](#) in the program’s geographic region.

To find the Percentage of students eligible to receive Free and Reduced-Price Meals:

a) Click on the link: <https://dq.cde.ca.gov/dataquest/>

b) Filter the report to reflect the geographic region that the applicant is serving or plan to serve.



I. Select Level – Selection varied. Make selections that reflect the program’s geographic region.

II. Select Subject – Select “Free and Reduced-Price Meals” under Other Reports.

III. Select Submit – Click “Submit” button.

IV. Determine a time frame – Select “2019-20”.

V. Enter a portion of the geographic region’s name, then click “Submit” button.

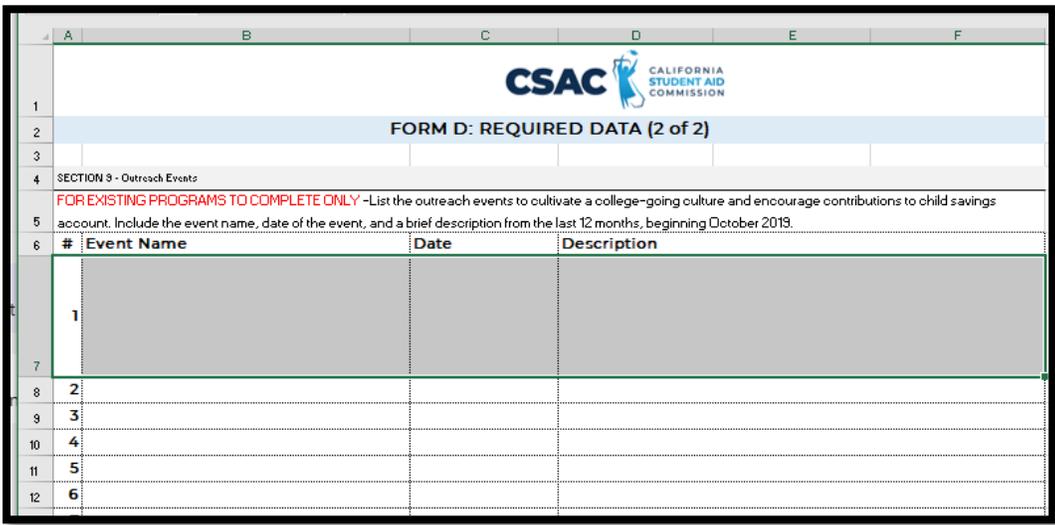
VI. Select District – Select first option “Free and Reduced-Price Meal – (*geographic region*) summary data”.

- c) Print a copy of the page and attach to Form D. This will be your “supporting document”.
- d) Note: If the program covers multiple geographic regions, use the average of all the Free and Reduced-Price Meals percentages as the percentage to enter on Form D, Section 6.

- 10. Section 7 – Amount must be rounded to the nearest dollar.
- 11. Section 8 – Enter the source name and dollar amounts. If the applicant has a new program, only enter data in the peach color columns. If the applicant has an existing program, only enter data in the green color columns. Delete unused rows.

Form D (2 of 2): Required Data

- 1. This form is *only for applicants with an existing program* to complete. Applicants with a new program will skip this form.
- 2. Enter the name and date of the outreach event.
- 3. Provide a brief description of the event.
- 4. The event must have been held within the last 12 months, beginning October 2019.
- 5. All cells under Description are in Wrap Text. Please expand the cell, by dragging down the row, so the entire response is visible.



CSAC CALIFORNIA STUDENT AID COMMISSION		
FORM D: REQUIRED DATA (2 of 2)		
SECTION 9 - Outreach Events		
FOR EXISTING PROGRAMS TO COMPLETE ONLY -List the outreach events to cultivate a college-going culture and encourage contributions to child savings account. Include the event name, date of the event, and a brief description from the last 12 months, beginning October 2019.		
#	Event Name	Description
1		
2		
3		
4		
5		
6		

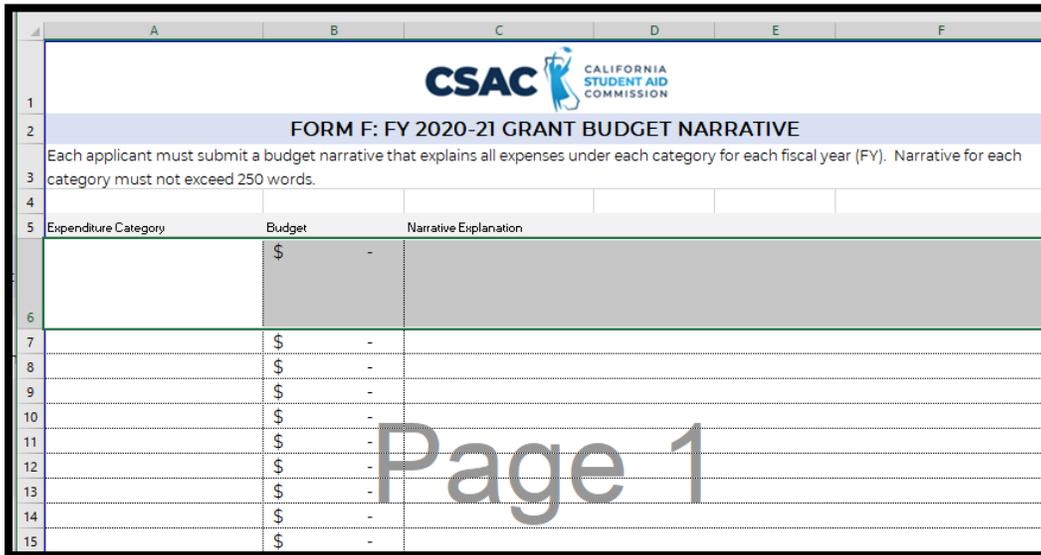
- 6. Delete unused rows.
- 7. Total the number of events from the list.
- 8. Enter the number at the bottom of the list next to “Total # events from last 12 months”.

Form E: How Funding Will Be Used

1. Total Budget Requested – Do NOT enter amount. It will auto populate from Form D, Section 1.
2. Enter expenditure categories and their allocated amounts.
3. The Total Budget must equal the Total Budget Requested to obtain the status “Balanced Budget”. If they do not match, the status will be either “Underbudgeted – Try Again” or “Overbudgeted – Try Again”.
4. Unlike other forms on this file, you will NOT be able to delete unused rows.

Form F & G: Grant Budget Narratives by Fiscal Year

1. Enter expenditure categories and their allocated amounts for their respective fiscal year.
2. Provide a brief narrative for each category. Each narrative must not exceed 250 words.
3. All cells under Narrative Explanation are in Wrap Text. Please expand the cell, by dragging down the row, so the entire response is visible.



CSAC CALIFORNIA STUDENT AID COMMISSION		
FORM F: FY 2020-21 GRANT BUDGET NARRATIVE		
Each applicant must submit a budget narrative that explains all expenses under each category for each fiscal year (FY). Narrative for each category must not exceed 250 words.		
Expenditure Category	Budget	Narrative Explanation
	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	
	\$ -	

4. Delete rows that will not be used.