



SCORING RUBRICS

SCORING RUBRIC FOR NEW PROGRAMS ONLY

Minimum Qualifications

Per Education Code Section 70115.1(c)(1), applicants must satisfy each of the following four minimum qualifications in order to be considered for CSA Grant Program funding:

CRITERIA	TRUE	FALSE
Not have a local child savings account program in operation or under development.		
Seek the grant to establish a local child savings account program that primarily targets children who are 0 to 10 years of age, inclusive.		
Have or develop a plan to augment funding it receives under this chapter to provide continued financial support for its proposed program.		
Indicate in its application that its proposed program has the capacity to enroll eligible children into the program or that the program has the ability to automatically enroll eligible children.		

If any answer is “False”, the applicant is not a qualified applicant and will not be considered for an award amount.

Scoring Criteria

Ranking Points Determination

Education Code Section 70115.1(c)(2) specifies that the Commission shall give grant priority to qualified applicants based on the following below. This priority list will only take into effect if the total funding requests exceed the funding available, and if the pool of qualified applicants is competitive; in order to ensure that no awardee receives less than \$100,000.



- A. Higher percentages of students in the local program's geographic region who are eligible to receive free or reduced-price meals.
- B. Lower average and median incomes of families living in the local program's geographic region.
- C. Lower college-going rates for students in the local program's geographic region.
- D. A higher amount of funding secured, or planned to be secured, through local budget commitments, philanthropy, or other funding sources.
- E. A higher number of children who would have access to a college savings account under the local program.
- F. Has a long-term and fiscally sound plan to sustain its local program.
- G. Has a detailed and 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.
- H. Has 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.

For items A, D, and E, the applicant with the highest number will receive the maximum point value. The maximum point value equals the number of qualified applicants. The applicant with the lowest number will receive 1 point.

- Note: For Item D, the Commission will divide the "funding secured or plan to be secured" by the "number of children who would have access to a college savings account" to get a Dollar Amount per student. This Dollar Amount will be the number used in Item D.

For items B and C, the applicant with the lowest number will receive the maximum point. The maximum point value equals the number of qualified applicants. The applicant with the lowest figure will receive 1 point.

Items F and H are each worth 1 point for "yes" and 0 points for "no".

Item G is worth 3 points total, each component is worth 1 point for "yes" and 0 points for "no".



Award Amount Determination

Education Code Section 70115.1(a) specifies that the Commission shall distribute CSA Grant Program funds to qualifying applicants based on the following factors:

- How many qualified applicants are eligible to receive grants;
- The amount of available funding to award grants;
- The number of students that each participating applicant intends to serve under the program;
- The percentage of low-income families residing in the community served by each participating applicant; and
- The total Ranking Points determined by list of priorities set by the Statute. *Note: This priority list will only take into effect if the total funding requests exceed the funding available, and or if the pool of qualified applicants is competitive.*

The Commission will use a weighted formula to determine how much funding each qualifying applicant will receive:

Step 1: The number of entities eligible to receive grants will depend on how many entities apply, the total amount of funding requested from all applicants (developing a new college savings program), and the priority ranking.

Step 2: The amount of available funding is up to **\$7,400,000** (seven million, four hundred thousand dollars).

Step 3: The number of students that each qualifying applicant intends to serve, identified in Form D, will result in each applicant being assigned a score from 0 to 50, based on the *total* number of students that *all* applicants indicate they intend to serve from March 1, 2021 through June 2022, as follows:

Step 3a. The number of students intended to be served by all qualifying applicants will be added together, the sum of which will be the Total Number of Students to be Served.

Step 3b. The number of students intended to be served by each qualifying applicant will then be divided by the Total Number of Students to be Served, producing an Student-Served Quotient for each qualifying applicant.



Step 3c. The Student-Served Quotient for each qualifying applicant will then be multiplied by 50 points, producing the Students-Served Points for each applicant.

Step 4: The percentage of low-income families residing in the community served by the college savings plan for each qualifying applicant, as identified in Form D, will result in each applicant being assigned a score from 0 to 50, weighted so that the applicant with the largest percentage of low-income families receives the highest score, and the applicant with the smallest percentage receives the lowest score, as follows:

Step 4a. The percentage of low-income families residing in the community served will be added together, the sum of which will be the Total Percentage of Low-Income Families.

Step 4b. The percentage of low-income families residing in the community served will then be divided by the Total Percentage of Low-Income Families, producing a Low-Income Families Quotient for each qualifying applicant.

Step 4c. The Low-Income Families Quotient for each qualifying applicant will then be multiplied by 50 points, producing the Low-Income Families Points for each applicant.

Step 5: Each qualifying applicant's Students-Served Points and Low-Income Families Points will be added together, the sum of which will be the Applicant Total Points. The prioritization of applicants will be applied in Step 5 using the Total Ranking Points determined earlier.

Step 5a. Each qualifying applicant's Total Points will be added to the Total Ranking Points, the sum of which will be the Grand Points.

Step 5b. The Grant Points will be added together, the sum of which will be the Grand Total Points.

Step 5c. The Grand Points will be divided by the Grand Total Points, then converted to a percentage, to produce a Percentage of Funds.



Step 5d. Each qualifying applicant's Percentage of Funds will be multiplied by \$7,400,000, the product of which is the Calculated CSA Award Amount.

Step 5e. The Commission will eliminate a qualifying applicant if their Calculated CSA Award Amount is under \$100,000.

Step 5f. The Commission will adjust the award amount so no qualifying applicant will be awarded an amount greater than the funding requested.

Step 5g. Any excess funding amounts after Step 5f will be re-distributed to the qualifying entities who do not receive the full funding requested.

Step 5h. Re-distribution of funds will be based on the Total Ranking Points.

- i. The Total Ranking Points of all qualifying applicants, who do not receive the full requested amount, will be added together, the sum of which will be the Grand Total Ranking Points.
- ii. Each qualifying applicant's Total Ranking Points will be divided by the Grand Total Ranking Points, then converted to a percentage, to produce a Second Percentage of Funds for each qualifying applicant.
- iii. Each qualifying applicant's Second Percentage of Funds will be multiplied by the excess funding amount, the product of which is the Preliminary Award Offer.
- iv. Steps 5e-5h will be taken again to meet Statute guidelines.

Step 5i. If there are not enough qualified entities to expend the allocated maximum \$7,400,000, the excess funds will be re-directed to qualified entities with an existing child savings program.



SCORING RUBRIC FOR EXISTING PROGRAMS ONLY

Minimum Qualifications

Per Education Code Section 70115.1(c)(1), applicants must satisfy each of the following four minimum qualifications in order to be considered for CSA Grant Program funding:

CRITERIA	TRUE	FALSE
Have a local child savings account program in operation or under development that primarily		
Have moneys, in addition to grants received under this chapter, to support its program.		
Indicate in its application that its program has the capacity to enroll eligible children into the program or that the program has the ability to automatically enroll eligible children.		

If any answer is “False”, the applicant is not a qualified applicant and will not be considered for an award amount.

Scoring Criteria

Ranking Points Determination

Education Code Section 70115.1(c)(2) specifies that the Commission shall give grant priority to qualified applicants based on the following below. This priority list will only take into effect if the total funding requests exceed the funding available, and or if the pool of qualified applicants is competitive; in order to ensure that no awardee receives less than \$100,000.

- A. Higher percentages of students in the local program’s geographic region who are eligible to receive free or reduced-price meals.
- B. Lower average and median incomes of families living in the local program’s geographic region.
- C. Lower college-going rates for students in the local program’s geographic region.
- D. A higher amount of funding secured through local budget commitments, philanthropy, or other funding sources.



- E. A higher total amount of funds saved for the local program.
- F. A higher number of outreach events demonstrated by the applicant in its application to cultivate a college-going culture and encourage contributions to child savings accounts.
- G. Demonstrated ability to sustain and potentially expand its program.
- H. Has 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.

For items A, D, E, and F, the applicant with the highest number will receive the maximum point value. The maximum point value equals the number of qualified applicants. The applicant with the lowest number will receive 1 point.

- Note 1: For Item D, the Commission will divide the “funding secured” by the “number of children served” to get a Dollar Amount per student. This Dollar Amount will be the number used in Item D.

For items B and C, the applicant with the lowest number will receive the maximum point. The maximum point value equals the number of qualified applicants. The applicant with the lowest figure will receive 1 point.

Item G and H are each worth 1 point for “yes” and 0 points for “no”.

Award Amount Determination

Education Code Section 70115.1(a) specifies that the Commission shall distribute CSA Grant Program funds to qualifying applicants based on the following factors:

- How many qualified applicants are eligible to receive grants;
- The amount of available funding to award grants;
- The number of students that each participating applicant intends to serve under the program;
- The percentage of low-income families residing in the community served by each participating applicant; and
- The total Ranking Points determined by list of priorities set by the Statute. *Note: This priority list will only take into effect if the total funding requests exceed the funding available, and or if the pool of qualified applicants is competitive.*



The Commission will use a weighted formula to determine how much funding each qualifying applicant will receive:

Step 1: The number of entities eligible to receive grants will depend on how many entities apply, the total amount of funding requested from all applicants (developing a new college savings program), and the priority ranking.

Step 2: The amount of available funding is, at minimum, **\$2,400,000** (two million, four hundred thousand dollars).

Step 3: The number of students that each qualifying applicant intends to serve, identified in Form D, will result in each applicant being assigned a score from 0 to 50, based on the *total* number of students that *all* applicants indicate they intend to serve from March 1, 2021 through June 2022, as follows:

Step 3a. The number of students intended to be served by all qualifying applicants will be added together, the sum of which will be the Total Number of Students to be Served.

Step 3b. The number of students intended to be served by each qualifying applicant will then be divided by the Total Number of Students to be Served, producing a Student-Served Quotient for each qualifying applicant.

Step 3c. The Student-Served Quotient for each qualifying applicant will then be multiplied by 50 points, producing the Students-Served Points for each applicant.

Step 4: The percentage of low-income families residing in the community served by the college savings plan for each qualifying applicant, as identified in Form D, will result in each applicant being assigned a score from 0 to 50, weighted so that the applicant with the largest percentage of low-income families receives the highest score, and the applicant with the smallest percentage receives the lowest score, as follows:

Step 4a. The percentage of low-income families residing in the community served will be added together, the sum of which will be the Total Percentage of Low-Income Families.



Step 4b. The percentage of low-income families residing in the community served will then be divided by the Total Percentage of Low-Income Families, producing an Low-Income Families Quotient for each qualifying applicant.

Step 4c. The Low-Income Families Quotient for each qualifying applicant will then be multiplied by 50 points, producing the Low-Income Families Points for each applicant.

Step 5: Each qualifying applicant's Students-Served Points and Low-Income Families Points will be added together, the sum of which will be the Applicant Total Points. The prioritization of applicants will be applied in Step 5 using the Total Ranking Points determined earlier.

Step 5a. Each qualifying applicant's Total Points will be added to the Total Ranking Points, the sum of which will be the Grand Points.

Step 5b. The Grant Points will be added together, the sum of which will be the Grand Total Points.

Step 5c. The Grand Points will be divided by the Grand Total Points, then converted to a percentage, to produce a Percentage of Funds.

Step 5d. Each qualifying applicant's Percentage of Funds will be multiplied by \$2,400,000, the product of which is the Calculated CSA Award Amount.

Step 5e. The Commission will eliminate a qualifying applicant if their Calculated CSA Award Amount is under \$100,000.

Step 5f. The Commission will adjust the award amount so no qualifying applicant will be awarded an amount greater than the funding requested.

Step 5g. Any excess funding amounts after Step 5f will be re-distributed to the qualifying entities who do not receive the full funding requested.



Step 5h. Re-distribution of funds will be based on the Total Ranking Points.

- i. The Total Ranking Points of all qualifying applicants, who do not receive the full requested amount, will be added together, the sum of which will be the Grand Total Ranking Points.
- ii. Each qualifying applicant's Total Ranking Points will be divided by the Grand Total Ranking Points, then converted to a percentage, to produce a Second Percentage of Funds for each qualifying applicant.
- iii. Each qualifying applicant's Second Percentage of Funds will be multiplied by the excess funding amount, the product of which is the Preliminary Award Offer.
- iv. Steps 5e-5h will be taken again to meet Statute guidelines.