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March 23, 2016

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California State University Report: Final Institutional Financial Aid Programs

As required by Section 66021.1 of the Education Code, the California State University's Final Institutional Financial Aid Report for the 2014/15 academic year is available and has been posted to www.calstate.edu/budget/fybudget/legislative-reports/. This year's report also includes information on the Middle Class Scholarship program as required by Education Code Section 70022 (4)(c).

We would also like to take this opportunity to share with you the following facts about CSU financial aid:

- In 2014/15 80% of all CSU students (367,500) received over \$4 billion in total financial assistance.
- 75% of undergraduate financial aid recipients have their tuition fees fully covered by grants or waivers.
- 51% of CSU baccalaureate recipients graduated with zero education loan debt.
- Of the 49% who graduated with debt, the average loan debt of \$14,388 is lower than the California average of \$21,382, and well below the national average of \$28,950.
- The mandatory fee waivers as reported here represent nearly \$68 million in foregone revenue to CSU campuses

CSU Campuses
Bakersfield
Channel Islands
Chico
Dominguez Hills
East Bay

Fresno
Fullerton
Humboldt
Long Beach
Los Angeles
Maritime Academy

Monterey Bay
Northridge
Pomona
Sacramento
San Bernardino
San Diego

San Francisco
San José
San Luis Obispo
San Marcos
Sonoma
Stanislaus

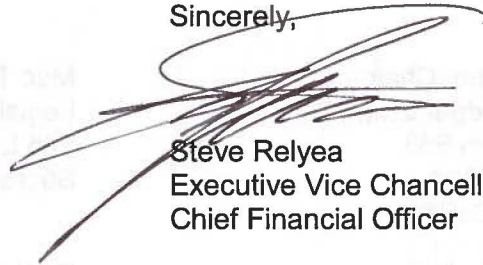
CSU Report: Final Institutional Financial Aid Programs

March 23, 2016

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If you have any questions about this report, please contact Mr. Dean Kulju, Director, Student Financial Aid Services and Programs at (562) 951-4737.

Sincerely,



Steve Relyea
Executive Vice Chancellor and
Chief Financial Officer

SR:dk

Full report posted to www.calstate.edu/budget/fybudget/legislative-reports/

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INSTITUTIONAL FINANCIAL AID PROGRAMS AT THE CALIFORNIA STATE UNIVERSITY

Section 66021.1 of the California Education Code directs the California State University to report annually to the Legislature on its institutional financial aid programs including a preliminary and final report. This final report is provided in response to the request which reads as follows:

66021.1 (b) The California State University shall, and the University of California is requested to, report annually to the Legislature on their respective institutional financial aid programs. The California State University shall, and the University of California is requested, to provide preliminary reports on or before January 10 of each year, and the final reports on or before March 31 of each year.

(c) The preliminary reports shall include all of the following:

(1) A description of the goals, terms, and policies of each of the university's institutional aid programs, including eligibility criteria, allocation of financial aid awards, fee waivers, and other relevant information.

(2) A description and explanation of any changes the university has made to any of these policies since the prior year, and any changes the university intends to make for the next academic year.

(3) The total amount the university expended on institutional aid for students, disaggregated by student level, for the two prior academic years, the current year, and a projection for the next year, and the average and 90th percentile undergraduate institutional aid award amount provided per recipient for the prior two academic years and the current academic year.

(4) The average and 90th percentile parental income level, expected family contribution, and the financial need of undergraduate need-based student institutional gift aid recipients for the prior two academic years.

(5) For the prior year, the current year, and the budget year, and an analysis identifying the estimated number of undergraduates with financial need; their aggregate cost of attendance and aggregate expected federal parent contribution; the aggregate amount of financial aid, including federal gift aid, state gift aid, institutional need-based aid, institutional merit-based aid, other institutional gift aid, and private gift aid, received by these students; the aggregate remaining amount to be met by work, borrowing, or other means; and an explanation of the estimated change in aggregate student need in the budget year resulting from changes in the cost of attendance, and other factors, including any fee increases proposed by the university in its fall budget proposal. The explanation shall include an estimate of the extent to which cost increases will be offset by federal, state, and institutional financial aid programs.

(6) The typical financial aid package for a typical dependent undergraduate student with a parent income of twenty thousand dollars (\$20,000), forty thousand dollars (\$40,000), sixty thousand dollars (\$60,000), eighty thousand dollars (\$80,000), and one hundred thousand dollars (\$100,000).

(d) The final report shall include all of the following for the prior academic year:

(1) An aggregate summary of financial aid awarded to students, including scholarships, grants, waivers, loans, and work-study awards from federal, state, institutional, and private sources.

(2) Indicators of effectiveness of university's aid programs in achieving the university stated goals related to financial aid.

Financial Aid Reports

In addition to this report, the University produces a variety of ad hoc reports which contain a variety of information including student costs, trends, and historical data.

Information regarding fees and financial aid are provided to the Board of Trustees throughout the year as part of finance and budget presentation and discussions.

Overview of Institutional Aid Programs

Historically, California has made a strong commitment to provide access to public postsecondary institutions while making it a priority to keep fees low at these institutions. Up until the Educational Opportunity Program was introduced in 1969 the availability of federal student aid programs, along with the state's scholarship program, precluded the apparent need for any system wide financial aid program at the CSU. The Program was introduced in order to promote expanded educational opportunities for low-income disadvantaged students. With its success public institutions have continued to see more individuals rightfully afforded the ability to go to college, despite increases in the cost of attendance for postsecondary education. As such the CSU and other higher education institutions have employed additional efforts to ensure that sufficient financial aid is available to assist students in meeting their costs to pursue their college degrees and overcome financial barriers. *See Table 1.1 Institutional Aid Expenditures on page 9 of this report.*

Goals for Institutional Aid Programs

Institutional aid programs contribute to a robust assortment of federal and state programs that make it possible to address the financial needs of CSU students. The CSU Board of Trustees adopted a fee and financial aid policy in 1993 with the goal to cover the State University Fee for financially needy students. In response to Trustee policy, to the maximum extent possible, the CSU offsets the State Tuition Fee for low and middle-income students utilizing the State University Grant and Cal Grant programs to promote access and ensure affordability for students with the least ability to pay. While not all CSU students may be eligible for grants, campuses construct financial aid packages with work study and loans after grants to minimize student indebtedness.

State University Grants (SUG)

The State University Grant (SUG) program was established for the 1982-83 award year with a General Fund appropriation of \$3.4 million. Due to fiscal considerations, General Fund support for the SUG program leveled off at \$33.7 million in 1992/93. Absent an increase in state support for the SUG program, in March 1993, the CSU Board of Trustees approved the framework for a new student fee and financial aid policy that called for dedicating one-third of annual incremental fee revenues to augment the State University Grant program. The CSU commitment to this program for 2015-16 is \$622 million. The SUG program provides need-based grants to eligible California residents and Dream applicants who enroll at CSU campuses in undergraduate, post-baccalaureate, and graduate programs. Need is based on expected family contribution (EFC) which cannot exceed one half of the campus standard cost of attendance for students living off-campus. The awarding criteria may vary across campuses depending on funds available, student demographics etc.

Educational Opportunity Program (EOP) Grants

The Educational Opportunity Program (EOP) Grants were established under the Budget Act of 1969 to provide financial assistance and support services to economically disadvantaged students admitted to the CSU under the Educational Opportunity Program. Program participants must be California residents enrolled in undergraduate degree programs and demonstrate financial need based on EFC which may vary across campuses. The maximum authorized grant is \$2,000 per year by statute; however, funding for the program has remained static at approximately \$17.5 million since the 1980's. The average award amount of an EOP grant is \$800.

Graduate Equity Fellowships

The Graduate Equity Fellowship program was established in 1985-86 and targets educationally and economically disadvantaged students to promote diversity in our graduate study programs and increase participation in those fields of study. The available funding of approximately \$850,000 was permanently allocated to campuses in 1996-97. The average award amount of a Graduate Equity Fellowship is \$2,491.

CSU Future Scholars Program Awards

The CSU Future Scholars Program, funded through lottery revenues, was designed to promote college participation of student who is disadvantaged because of economic, educational, or environmental background. Awards are renewable based on satisfactory academic performance. Financial need is not a criterion for eligibility and significant discretion is accorded to campuses in the use of funding to achieve program objectives. This program was designated as a campus based program in 2000-01 thus permitting campuses greater flexibility in the use of available lottery funding. The average award amount of a Future Scholars award is \$1,175.

Campus Fee-Funded Grants

Several CSU campuses set aside one-third of their resources from campus fee increases per Trustee policy (Executive Order 661) to assist financially needy students. Executive Order 740 superseded Executive Order 661 in April 2000, as requested by campus and student leaders, eliminating this requirement. In 2014-2015, 2,087 students received campus fee grants for a total of \$3,272,720.

Institutional Scholarships

CSU campuses provide a variety of institutional scholarships to enrolled students. Funding for these awards typically come from endowments, annual gifts, or other resources designated for this purpose. Eligibility criteria for institutional scholarships vary widely by campus as do application requirements and selection procedures. The average institutional scholarship award amount is \$2,363.

This category of assistance does not include “Outside Scholarships and Grants” where the funding is external to the campus and the determination of eligibility or the designation of award recipients is made by a source external to the institution.

Athletic Scholarships and Grants

CSU campuses with intercollegiate athletic programs provide athletic scholarships or grants to student-athletes. Typically the funding is derived from revenues generated by athletic programs or development (fund-raising) efforts of the campus and administered in conformance with applicable regulations and guidance from the National Collegiate Athletic Association (NCAA). Athletic grants and scholarships are generally awarded without respect to financial need but CSU policy requires that all awards be reported to the financial aid office to ensure the coordination of resources provided to need-based financial aid recipients and the prevention of over-awards to students. The average athletic scholarship award amount is \$8,361.

Education Doctorate Grant

The Education Doctorate Grant program was established in the 2007-08 academic year in conjunction with the independent educational doctorate program. Funding for the program is derived by a 10 percent set aside of the educational doctorate fees. Need based awards are made to California residents demonstrating the requisite need while completing their doctorate program. Award amounts are limited to the amount of education doctorate fees. In 2014-15, 204 students received funding for a total of \$892,809.

Doctor of Physical Therapy Grant

The Doctor of Physical Therapy Grant program was established in the 2012-13 academic year in conjunction with the doctorate program. Funding for the program is derived by a 33.3 percent set aside of the doctorate fees. Need based awards are made to California residents demonstrating the requisite need while completing their doctorate program. Award amounts are limited to the amount of physical therapy doctorate fees. In 2014-15, 420 students received funding for a total of \$3,747,929.

Doctor of Nursing Practice Grant

The Doctor of Nursing Practice Grant program was established in the 2012-13 academic year in conjunction with the doctorate program. Funding for the program is derived by a 20 percent set aside of the doctorate fees. Need based awards are made to California residents demonstrating the requisite need while completing their doctorate program. Award amounts are limited to the amount of nursing practice doctorate fees. In 2014-15, 21 students received funding for a total of \$278,762.

Graduate Business Grant

The Graduate Business Grant was established in the 2009-10 academic year consistent with the graduate business professional fee. Funding for the program is derived by a minimum 25 percent set aside of the graduate business professional fee. Need based awards are made to California residents demonstrating the requisite need while completing their master's program. Award amounts are limited to the amount of graduate business professional fees. In 2014-15, 940 students received funding for a total of \$2,834,753.

Waivers of Tuition Fee

In addition to traditional financial aid programs, fee waivers for Tuition Fees and campus-based fees are provided to students per the Education Code. During the years covered by this report, mandatory waivers are available to dependents or survivors of disabled or deceased California veterans, certain recipients (or children of recipients) of a Congressional Medal of Honor, children or surviving spouses of deceased public law enforcement or fire suppression employees who were California residents and who were killed in the course of law enforcement or fire suppression duties, and dependents of victims of the September 11, 2001 terrorist attacks. In addition, campuses have the authority to provide "discretionary" fee waivers to various categories of students. More detailed information is provided in the CSU Mandatory Waiver Report on page 10 of this report.

Recent and Anticipated Changes to Institutional Aid Policy

No changes are expected at this time. Table 1.1 reflects the Institutional Aid expenditures for 2014-15.

Mandatory Fee Waiver Programs

The following table reflects the actual number of waivers provided. The table also provides the minimum, average, and maximum amounts of waivers granted; as well as the aggregate cost of waivers for each CSU mandatory waiver program. CSU defines mandatory waivers as those mandated by state law – Alan Pattee, California Veteran, and 9-11 Victims Dependents. CSU also funds a number of non-state mandated waivers that are required by labor contracts (Employee and Dependents), state policy (California Residents 60+), and CSU policy that addresses state policy concerns (High School Students Special Programs). *See CSU Mandatory Waiver Report on page 10.*

Undergraduate Institutional Aid Recipients

The average and 90th percentile undergraduate institutional aid award amount provided per recipient for the prior two academic years and the current academic year are provided below:

	Avg	90th Percentile
2013-2014	\$4,500	\$6,122
Amount		

	Avg	90th Percentile
2014-2015	\$4,473	\$6,122
Amount		

<i>2015-2016</i>	Avg	90th Percentile
Amount	\$4,490	\$6,130

Undergraduate Need-based Institutional Aid Recipients

In 2013-2014; 131,975 CSU undergraduates (34% of enrolled students) received funding from this source. Their financial characteristics and average institutional aid award are presented below.

<i>2013-2014</i>	Avg	90th Percentile
Parent Income *	\$25,238	\$53,151
Expected Family Contribution	\$675	\$2,696
Financial Need	\$19,377	\$24,378

** Dependent students*

In 2014-2015; 141,218 CSU undergraduates (35% of enrolled students) received funding from this source. Their financial characteristics and average institutional aid award are presented below.

<i>2014-2015</i>	Avg	90th Percentile
Parent Income *	\$27,076	\$54,874
Expected Family Contribution	\$682	\$2,688
Financial Need	\$19,588	\$25,049

** Dependent students*

Effectiveness of Institutional Aid Programs

The following information is from the 2014-2015 academic year:

More than 79% of *all* CSU students receive some form of financial assistance and 75% of undergraduate financial aid recipients have their fees fully covered by grants or waivers.

Regarding student indebtedness, the most recent national information for baccalaureate recipients is from the 2013-2014 academic year:

2013-2014	Amount of Debt	% with Debt
CSU Average	\$14,388	49%
California Average	\$21,382	55%
National Average	\$28,950	69%

CSU students are about 49% below the national average and approximately 32% below the state average.

Source: The Project on Student Debt “Student Debt and the Class of 2014”, December 2015

Undergraduate Student Costs and Resources

The following tables reflect data on the aggregate cost of attendance, EFC, financial need, and the aid received from various sources on the part of financially needy undergraduates enrolled at the CSU. The tables also include an entry for outstanding or unmet need.

In reviewing these tables it is important to note that the aggregate amounts of financial aid cannot be deducted from the aggregate need figure to determine the outstanding or unmet need. Some students with financial need receive aid in excess of their evaluated need; this occurs when students receive unsubsidized student loans or parent loans to replace all or a portion of the expected family contribution.

Financial need is determined by deducting the amount of the EFC determined through the federal need analysis methodology from the student's Cost of Attendance (COA). Student financial aid administrators on the campuses then offer the student a "package" of financial aid taking into account the total aid that the student might receive from all sources. When financial aid program resources are not adequate to award students the full amount of their financial need, a student may appear to have unmet need. Unmet need may be created when a student who is awarded work-study does not work the requisite number of hours required to earn the full amount of the work-study awarded. Students may also elect not to borrow, thus creating unmet need to the extent of student loans included as a part of the package. In addition, students may elect to decrease the costs used to determine their financial need, e.g., sharing an apartment with several roommates.

During 2014-2015, there were 285,548 CSU undergraduates who demonstrated financial need and received funding. This number represents approximately 72 percent of the college year undergraduate headcount enrollment of 394,831 undergraduates for 2014-2015.

2014-15 Undergraduates

Aggregate Need and Aid	Students	Dollars	Avg
Cost of Attendance	285,548	\$5,747,674,354	\$20,129
Expected Family Contribution	285,532	\$766,678,727	\$2,685
Financial Need	285,532	\$4,980,724,935	\$17,444
Outside Scholarships & Other Resources	17,333	\$42,518,826	\$2,453
Federal Gift Aid	209,975	\$926,014,525	\$4,410
State Gift Aid (Cal Grants)	114,709	\$586,567,372	\$5,114
Institutional Non-need-based Gift Aid	16,934	\$49,294,692	\$2,911
Institutional Need-based Gift Aid	131,272	\$582,287,121	\$4,436
All Scholarships & Grant Aid	278,827	\$2,234,983,740	\$8,016
Balance of Need after Gift Aid	281,884	\$2,753,397,845	\$9,768
Total Work-Study	6,797	\$17,327,356	\$2,549
Total Loans	142,783	\$1,006,593,676	\$7,050
Total Financial Aid	285,564	\$3,258,904,772	\$11,412
Outstanding/Unmet Need	248,918	\$1,843,281,003	\$7,405

2015-16 Undergraduates

Aggregate Need and Aid	Students	Dollars	Avg
Cost of Attendance	291,000	\$5,907,300,000	\$20,300
Expected Family Contribution	291,000	\$814,800,000	\$2,800
Financial Need	291,000	\$5,092,500,000	\$17,500
Outside Scholarships & Other Resources	17,600	\$44,000,000	\$2,500
Federal Gift Aid	214,000	\$952,300,000	\$4,450
State Gift Aid (Cal Grants)	118,000	\$605,340,000	\$5,130
State Scholarship (MCS)	61,000	\$48,800,000	\$800
Institutional Non-need-based Gift Aid	17,300	\$51,900,000	\$3,000
Institutional Need-based Gift Aid	136,000	\$605,200,000	\$4,450
All Scholarships & Grant Aid	284,162	\$2,307,540,000	\$9,650
Balance of Need after Gift Aid	287,217	\$2,784,960,000	\$9,800
Total Work-Study	6,700	\$17,420,000	\$2,600
Total Loans	145,500	\$1,033,050,000	\$7,100
Total Financial Aid	291,000	\$3,358,010,000	\$11,540
Outstanding/Unmet Need	253,665	\$1,873,249,200	\$7,385

2016-17 Undergraduates

Aggregate Need and Aid	Students	Dollars	Avg
Cost of Attendance	293,500	\$6,046,100,000	\$20,600
Expected Family Contribution	293,500	\$851,150,000	\$2,900
Financial Need	293,500	\$5,194,950,000	\$17,700
Outside Scholarships & Other Resources	17,700	\$44,250,000	\$2,500
Federal Gift Aid	215,000	\$971,800,000	\$4,520
State Gift Aid (Cal Grants)	119,500	\$615,425,000	\$5,150
State Scholarship (MCS)	62,000	\$74,400,000	\$1,200
Institutional Non-need-based Gift Aid	17,500	\$52,500,000	\$3,000
Institutional Need-based Gift Aid	136,500	\$607,425,000	\$4,450
All Scholarships & Grant Aid	286,603	\$2,365,800,000	\$9,850
Balance of Need after Gift Aid	289,685	\$2,829,150,000	\$9,912
Total Work-Study	6,700	\$17,420,000	\$2,600
Total Loans	148,218	\$1,052,344,250	\$7,100
Total Financial Aid	293,500	\$3,435,564,250	\$11,706
Outstanding/Unmet Need	255,844	\$1,900,136,610	\$7,427

Typical financial aid packages for dependent students

This table/graphic would show the financial aid package received by a typical dependent student with a family income of: (a) \$20,000; (b) \$40,000; (c) \$60,000; (d) \$80,000; and (e) \$100,000.

The following tables assume that the student resides in off-campus housing (typically a shared apartment) and is an entering freshman. The parent contribution assumes a family of four with only one in college.

2015-16 Academic Year	Parent Income				
	\$20,000	\$40,000	\$60,000	\$80,000	\$100,000
Cost of Attendance	\$23,749	\$23,749	\$23,749	\$23,749	\$23,749
Parent Contribution	\$0	\$422	\$3,606	\$8,045	\$14,565
Financial Need	\$23,749	\$23,057	\$20,143	\$15,704	\$9,184
Typical Financial Aid Package					
Federal Pell Grant	\$5,775	\$5,325	\$2,125	\$0	\$0
Federal SEOG	\$800	\$750	\$0	\$0	\$0
Cal Grant	\$1,656	\$5,472	\$0	\$0	\$0
State University Grant	\$5,472	\$0	\$5,472	\$0	\$0
State Scholarship (MCS)	\$0	\$0	\$0	\$1,092	\$1,092
Federal Work-Study & Student Loan	\$10,046	\$11,510	\$12,546	\$14,612	\$8,092
Total Student Financial Aid	\$23,749	\$23,057	\$20,143	\$15,704	\$9,184

Table 1.1 Institutional Aid Expenditures

	Actual 2013-2014		Actual 2014-2015		Projected 2015-2016		Projected 2016-2017	
	Students	Dollars	Students	Dollars	Students	Dollars	Students	Dollars
State University Grants								
Undergraduate	115,383	\$541,774,569	120,881	\$564,538,500	122,600	\$578,220,000	123,600	\$579,000,000
Graduate/Postbaccalaureate	15,362	\$81,508,140	15,310	\$82,264,642	15,600	\$81,380,800	15,650	\$80,935,800
All Students	130,745	\$623,282,709	136,191	\$646,803,142	138,200	\$659,600,800	139,250	\$659,935,800
Educational Opportunity Program (EOP) Grants								
Undergraduate	21,229	\$17,218,196	21,437	\$17,152,470	21,500	\$17,437,973	21,500	\$17,437,973
Graduate/Postbaccalaureate	0	\$0	0	\$0	0	\$0	0	\$0
All Students	21,229	\$17,218,196	21,437	\$17,152,470	21,500	\$17,437,973	21,500	\$17,437,973
Graduate Equity Fellowships								
Undergraduate	0	\$0	0	\$0	0	\$0	0	\$0
Graduate/Postbaccalaureate	326	\$696,046	264	\$657,653	270	\$675,000	280	\$700,000
All Students	326	\$696,046	264	\$657,653	270	\$675,000	280	\$700,000
CSU Future Scholars Program Awards								
Undergraduate	421	\$536,633	373	\$438,249	390	\$456,300	400	\$468,000
Graduate/Postbaccalaureate	0	\$0	0	\$0	0	\$0	0	\$0
All Students	421	\$536,633	373	\$438,249	390	\$456,300	400	\$468,000
Campus Fee Grants								
Undergraduate	2,060	\$2,720,766	2,037	\$3,151,079	2,100	\$3,360,000	2,150	\$3,440,000
Graduate/Postbaccalaureate	170	\$270,111	50	\$121,641	60	\$150,000	70	\$175,000
All Students	2,230	\$2,990,877	2,087	\$3,272,720	2,160	\$3,510,000	2,220	\$3,615,000
Institutional Scholarships								
Undergraduate	18,144	\$39,807,764	19,996	\$44,128,441	20,100	\$44,220,000	20,200	\$44,440,000
Graduate/Postbaccalaureate	4,011	\$13,050,226	4,342	\$13,370,303	4,300	\$13,330,000	4,300	\$13,330,000
All Students	22,155	\$52,857,990	24,338	\$57,498,744	24,400	\$57,550,000	24,500	\$57,770,000
Athletic Scholarships & Grants								
Undergraduate	4,691	\$40,599,825	4,605	\$38,184,678	4,700	\$39,010,000	4,700	\$39,010,000
Graduate/Postbaccalaureate	63	\$728,407	81	\$996,358	75	\$907,500	75	\$907,500
All Students	4,754	\$41,328,232	4,686	\$39,181,036	4,775	\$39,917,500	4,775	\$39,917,500
Education Doctorate Grants								
	166	\$919,250	204	\$892,809	210	\$945,000	215	\$967,500
Doctorate of Physical Therapy Grants								
	290	\$2,347,335	420	\$3,747,929	430	\$3,612,000	440	\$3,696,000
Doctorate of Nursing Grants								
	26	\$370,624	21	\$278,762	25	\$337,500	25	\$337,500
Graduate Business Grant								
Undergraduate	30	\$92,167	44	\$94,196	50	\$145,000	50	\$145,000
Graduate/Postbaccalaureate	967	\$3,031,515	896	\$2,740,557	920	\$2,852,000	920	\$2,852,000
All Students	997	\$3,123,682	940	\$2,834,753	970	\$2,997,000	970	\$2,997,000
Subtotal-Grants & Scholarships								
Undergraduate	138,525	\$623,819,455	148,477	\$664,030,893	150,280	\$682,849,273	151,300	\$683,940,973
Graduate/Postbaccalaureate	19,130	\$103,774,996	19,450	\$106,050,013	19,706	\$102,907,300	19,779	\$102,596,300
All Students	157,655	\$727,594,451	167,927	\$770,080,906	169,986	\$785,756,573	171,079	\$786,537,273
Institutional Long-Term Educational Loans								
Undergraduate	35	\$121,920	29	\$117,327	35	\$143,500	35	\$143,500
Graduate/Postbaccalaureate	1	\$1,222	2	\$3,572	3	\$6,000	3	\$6,000
All Students	36	\$123,142	31	\$120,899	38	\$149,500	38	\$149,500
Unduplicated Students and Total Awards								
Undergraduate	138,543	\$623,926,882	148,489	\$664,148,220	150,295	\$682,992,773	151,315	\$684,084,473
Graduate/Postbaccalaureate	19,131	\$103,783,211	19,451	\$106,053,585	19,708	\$102,913,300	19,782	\$102,602,300
All Students	157,674	\$727,710,093	167,940	\$770,201,805	170,003	\$785,906,073	171,097	\$786,686,773
Waivers of State Tuition Fee								
Undergraduate	12,508	\$55,961,783	12,742	\$51,665,918	12,800	\$55,040,000	12,800	\$55,040,000
Graduate/Postbaccalaureate	2,500	\$10,426,943	2,858	\$12,394,207	2,900	\$13,050,000	2,900	\$13,050,000
All Students	15,008	\$66,388,726	15,600	\$64,060,125	15,700	\$68,090,000	15,700	\$68,090,000
Unduplicated Students and Total Assistance								
Undergraduate	150,311	\$679,865,640	160,369	\$715,814,138	162,231	\$738,032,773	163,245	\$739,124,473
Graduate/Postbaccalaureate	21,418	\$114,233,179	21,982	\$118,447,792	22,276	\$115,963,300	22,349	\$115,652,300
All Students	171,729	\$794,098,819	182,351	\$834,261,930	184,507	\$853,996,073	185,594	\$854,776,773

CSU State Mandated Waiver Report

		2013/14 Reported	2014/15 Reported	2015/16 Budget	2016/17 Budget
Number of Fee Waivers					
Cal Vet/Medal of Honor		7,470	8,031	8,031	8,031
	<i>Undergraduate</i>	7,044	7,598	7,598	7,598
	<i>Graduate</i>	426	433	433	433
Alan Pattee		39	37	37	37
	<i>Undergraduate</i>	38	35	35	35
	<i>Graduate</i>	1	2	2	2
Minimum/Average/Maximum Waiver					
<i>Cal Vet/Medal of Honor</i>					
	Undergraduate				
	Minimum	\$0	\$0	\$0	\$0
	Average	\$5,342	5,339	5,339	5,339
	Maximum	\$5,472	\$5,472	\$5,472	\$5,472
	Graduate				
	Minimum	\$0	\$0	\$0	\$0
	Average	\$5,992	6,001	6,001	6,001
	Maximum	\$6,738	\$6,738	\$6,738	\$6,738
<i>Alan Pattee</i>					
	Undergraduate				
	Minimum	\$0	\$0	\$0	\$0
	Average	\$5,442	5,362	5,362	5,362
	Maximum	\$5,472	\$5,472	\$5,472	\$5,472
	Graduate				
	Minimum	\$0	\$0	\$0	\$0
	Average	\$6,738	6,738	6,738	6,738
	Maximum	\$6,738	\$6,738	\$6,738	\$6,738
Aggregate Cost of Waivers					
<i>Cal Vet/Medal of Honor</i>					
	Undergraduate	\$37,623,346	\$40,566,942	\$40,566,942	\$40,566,942
	Graduate	2,562,542	2,599,619	2,599,619	2,599,619
		<u>\$40,185,888</u>	<u>\$43,166,561</u>	<u>\$43,166,561</u>	<u>\$43,166,561</u>
<i>Alan Pattee</i>					
	Undergraduate	\$209,523	186,807.24	\$186,807	\$186,807
	Graduate	6,738	10,107	10,107	10,107
		<u>\$216,261</u>	<u>\$196,914</u>	<u>\$196,914</u>	<u>\$196,914</u>
Mandatory Waivers		\$40,402,149	\$43,363,475	\$43,363,475	\$43,363,475
Other Required Waivers		25,333,011	24,226,304	24,226,304	24,226,304
Total Waivers Cost		<u>\$65,735,160</u>	<u>\$67,589,779</u>	<u>\$67,589,779</u>	<u>\$67,589,779</u>
Total Waivers		13,256	13,341	13,341	13,341

FINAL REPORT: Aggregate Summary of Financial Aid Awarded

2014-15 Student Financial Assistance by Student Level

Undergraduates	Number	Total	Mean
Pell Grant	211,377	\$911,848,477	\$4,314
SEOG Grant	24,604	\$12,908,299	\$525
BIA Grant	204	\$701,099	\$3,437
Chafee Grant	564	\$2,597,001	\$4,605
Federal Teach Grant	39	\$114,886	\$2,946
Other Federal Grant	961	\$2,659,758	\$2,768
Direct Loan-Subsidized	137,259	\$560,879,988	\$4,086
Direct Loan- Unsubsidized	108,035	\$494,852,042	\$4,580
Parent Loan	11,792	\$145,983,321	\$12,380
Perkins Loan	5,065	\$9,630,403	\$1,901
Nursing Student Loan	122	\$367,467	\$3,012
Federal Work-Study	6,808	\$17,342,904	\$2,547
Cal Grant A	29,256	\$148,609,405	\$5,080
Cal Grant B	85,828	\$439,291,950	\$5,118
Middle Class Scholarship	59,326	\$33,612,922	\$567
State University Grant	120,726	\$564,104,630	\$4,673
EOP Grant	21,437	\$17,152,470	\$800
Future Scholars Scholarship	373	\$438,249	\$1,175
Graduate Business Grant	27	\$68,288	\$2,529
Campus Fee Grant	2,037	\$3,151,079	\$1,547
Institutional Scholarship	19,938	\$44,024,688	\$2,208
Athletic Scholarship	4,605	\$38,184,678	\$8,292
Institutional Long Term Loan	29	\$117,327	\$4,046
Other Scholarship/Grant	19,524	\$43,226,925	\$2,214
Other Educational Loan	5,740	\$56,575,436	\$9,856
Tuition Fee Waivers	12,744	\$51,675,440	\$4,055
Americorp Grant	312	\$570,053	\$1,827
Other Resources	4,323	\$15,850,994	\$3,667
Direct Loans	164,652	\$1,206,281,960	\$7,326
Other Federal Aid Programs	212,519	\$940,827,390	\$4,427
Cal Grants	115,084	\$587,901,355	\$5,108
CSU Aid Programs & Waivers	143,621	\$633,464,303	\$4,411
All Work Study	6,808	\$17,342,904	\$2,547
All Loans	167,118	\$1,272,972,593	\$7,617
Total Aid w/Waivers	332,727	\$3,604,710,967	\$10,834
Institutional Grants	132,022	\$584,046,607	\$4,424
Work Study/Loans	170,034	\$1,290,315,497	\$7,589

2014-15 Student Financial Assistance by Student Level

Graduates	Number	Total	Mean
Pell Grant	3,037	\$9,878,592	\$3,215
SEOG Grant	0	\$0	\$0
BIA Grant	29	\$137,825	\$4,753
Chafee Grant	1	\$5,000	\$5,000
Federal Teach Grant	358	\$1,024,146	\$2,861
Other Federal Grant	230	\$2,322,064	\$10,096
Direct Loan-Subsidized	4,593	\$18,941,760	\$4,124
Direct Loan- Unsubsidized	22,350	\$286,527,560	\$12,820
PLUS Loan	1,150	\$8,695,791	\$7,562
Perkins Loan	1,169	\$3,317,445	\$2,838
Nursing Student Loan	15	\$122,780	\$8,185
Federal Work-Study	339	\$856,858	\$2,528
Cal Grant A	58	\$311,311	\$5,367
Cal Grant B	50	\$292,212	\$5,844
Middle Class Scholarship	1514	\$863,612	\$570
Graduate Equity Fellowship	253	\$638,886	\$2,525
State University Grant	15,465	\$82,698,512	\$5,347
Doctor of Education Grant	204	\$892,809	\$4,377
Doctor of Physical Therapy Grant	420	\$3,747,929	\$8,924
Doctor of Nursing Practice Grant	21	\$278,762	\$13,274
Graduate Business Grant	913	\$2,766,465	\$3,030
Campus Fee Grant	50	\$121,641	\$2,433
Institutional Scholarship	4,400	\$13,474,056	\$3,062
Athletic Scholarship	81	\$996,358	\$12,301
Institutional Long Term Loan	2	\$3,572	\$1,786
Other Scholarship/Grant	1,853	\$9,896,367	\$5,341
Other Educational Loan	625	\$6,571,541	\$10,514
Tuition Fee Waivers	2,856	\$12,384,685	\$4,336
Americorp Grant	165	\$583,354	\$3,535
Other Resources	1,397	\$10,715,698	\$7,671
Direct Loans	23,830	\$314,165,111	\$13,184
Other Federal Aid Programs	4,604	\$16,807,852	\$3,651
Cal Grants	130	\$691,580	\$5,320
CSU Aid Programs & Waivers	19,382	\$103,401,589	\$5,335
All Work Study	339	\$856,858	\$2,528
All Loans	24,296	\$324,180,449	\$13,343
Total Aid w/Waivers	34,794	\$467,850,137	\$13,446
Institutional Grants	16,112	\$87,718,894	\$5,444
Work Study/Loans	24,404	\$325,037,307	\$13,319

2014-15 Student Financial Assistance

All Students	Number	Total	Mean
Pell Grant	214,450	\$921,727,069	\$4,298
SEOG Grant	24,604	\$12,908,299	\$525
BIA Grant	233	\$838,924	\$3,601
Chafee Grant	565	\$2,602,001	\$4,605
Federal Teach Grant	397	\$1,139,032	\$2,869
Other Federal Grant	1,191	\$4,981,822	\$4,183
Direct Loan-Subsidized	141,852	\$579,821,748	\$4,088
Direct Loan- Unsubsidized	130,385	\$781,379,602	\$5,993
Parent Loan	11,792	\$145,983,321	\$12,380
Graduate PLUS Loan	1,577	\$13,262,400	\$8,410
Perkins Loan	6,234	\$12,947,848	\$2,077
Nursing Student Loan	137	\$490,247	\$3,578
Federal Work-Study	7,147	\$18,199,762	\$2,546
Cal Grant A	29,314	\$148,920,716	\$5,080
Cal Grant B	85,878	\$439,584,162	\$5,119
Middle Class Scholarship	60,840	\$34,476,534	\$567
Graduate Equity Fellowship	264	\$657,653	\$2,491
State University Grant	136,191	\$646,803,142	\$4,749
EOP Grant	21,437	\$17,152,470	\$800
Doctor of Education Grant	204	\$892,809	\$4,377
Doctor of Physical Therapy Grant	420	\$3,747,929	\$8,924
Doctor of Nursing Practice Grant	21	\$278,762	\$13,274
Future Scholars Scholarship	373	\$438,249	\$1,175
Graduate Business Grant	940	\$2,834,753	\$3,016
Campus Fee Grant	2,087	\$3,272,720	\$1,568
Institutional Scholarship	24,338	\$57,498,744	\$2,363
Athletic Scholarship	4,686	\$39,181,036	\$8,361
Institutional Long Term Loan	31	\$120,899	\$3,900
Other Scholarship/Grant	21,377	\$53,123,292	\$2,485
Other Educational Loan	6,365	\$63,146,977	\$9,921
Tuition Fee Waivers	15,600	\$64,060,125	\$4,106
Americorp Grant	477	\$1,153,407	\$2,418
Other Resources	5,720	\$26,566,692	\$4,645
Direct Loans	188,482	\$1,520,447,071	\$8,067
Other Federal Aid Programs	217,123	\$957,635,242	\$4,411
Cal Grants	115,214	\$588,592,935	\$5,109
CSU Aid Programs & Waivers	163,003	\$736,865,892	\$4,521
All Work Study	7,147	\$18,199,762	\$2,546
All Loans	191,414	\$1,597,153,042	\$8,344
Total Aid w/Waivers	367,521	\$4,072,561,104	\$11,081
Institutional Grants	148,134	\$671,765,501	\$4,535
Work Study/Loans	194,438	\$1,615,352,804	\$8,308

Section 66028.6 of the Education Code requires the CSU trustees to provide information regarding expenditures of revenues derived from student fees and the uses of institutional financial aid to the Legislature annually. CSU annually reports the use of student fee revenues in the Governor’s Budget “DETAILED EXPENDITURES BY PROGRAM” section for the past, current and budget year. As requested in Education Code section 66028.6, CSU is including additional details of the information presented in the Governor’s Budget in this institutional financial aid report. This information is designed to be representative of student fee revenue expenditure categories. CSU combines all General Fund and fee revenue for efficient fiscal operations. It does not budget nor expend resources by individual fund source.

2016/17 BUDGET GALLEY			CSU Student Fee
(Past Year 2014/15 SUMMARY)			Revenue
01	0101	General Academic Instruction	817,890,948
01	0102	Vocational/Technical Instruction	184,545
01	0104	Community Education	1,364,730
01	0105	Preparatory/Remedial Instruction	3,343,895
01	0106	Instructional Information Technology	15,606,853
01 Total			838,390,971
02	0201	Institutes and Research Centers	444,444
02	0202	Individual and Project Research	6,445,626
02	0203	Research Information Technology	25,632
02 Total			6,915,702
03	0301	Community Service	4,186,594
03	0303	Public Broadcasting Services	981,976
03	0304	Public Service Information Technology	62,366
03 Total			5,230,936
04	0401	Libraries	58,712,635
04	0402	Museums and Galleries	633,449
04	0403	Educational Media Services	12,701,637
04	0404	Academic Computing Support (obsolete program)	0
04	0405	Ancillary Support	7,243,577
04	0406	Academic Administration	127,606,919
04	0407	Academic Personnel Development	6,709,218
04	0408	Course and Curriculum Development	1,466,998
04	0409	Academic Support Information Technology	72,607,794
04 Total			287,682,227
05	0501	Student Services Administration	60,888,423
05	0502	Social and Cultural Development	70,351,278
05	0503	Counseling and Career Guidance	19,857,401
05	0504	Financial Aid Administration	15,332,973
05	0507	Student Health Services	101,984,941
05	0508	Student Services Information Technology	13,593,220
05	0509	Student Admissions	31,080,768
05	0510	Student Records	23,373,035
05 Total			336,462,039

2016/17 BUDGET GALLEY			CSU Student Fee
(Past Year 2014/15 SUMMARY)			Revenue
06	0602	Fiscal Operations	47,697,637
06	0605	Public Relations/Development	47,132,248
06	0606	General Administration	101,748,161
06	0607	Administrative Information Technology	104,333,004
06 Total			300,911,050
07	0701	Physical Plant Administration	36,642,621
07	0702	Building Maintenance	48,886,826
07	0703	Custodial Services	34,934,320
07	0704	Utilities	103,222,832
07	0705	Landscape and Grounds Maintenance	14,534,927
07	0706	Major Repairs and Renovations	82,490,248
07	0707	Security and Safety	32,658,949
07	0708	Logistical Services	39,112,746
07	0709	Oper and Maint Information Technology	1,275,963
07	0710	Lease Bond Payment	0
07 Total			393,759,432
08	0801	Scholarships	683,264,278
08	0802	Fellowships	560,097
08 Total			683,824,375
20	2001	Auxiliary Enterprise	
20 Total			
Total	Total		2,853,176,732