

401 Golden Shore, 5th Floor  
Long Beach, CA 90802-4210

CSU Legislative Reports Website  
[www.calstate.edu/budget/fybudget/legislative-reports/](http://www.calstate.edu/budget/fybudget/legislative-reports/)

Steve Relyea  
Executive Vice Chancellor  
and Chief Financial Officer

562-951-4600  
srelyea@calstate.edu

January 26, 2017

Honorable Chair  
Joint Legislative Budget Committee  
1020 N Street, Room 553  
Sacramento, CA 95814  
ATTN: Ms. Peggy Collins

Mac Taylor  
Legislative Analyst  
925 L Street, Suite 1000  
Sacramento, CA 95814

Michael Cohen, Director  
Department of Finance  
State Capitol, Room 1145  
Sacramento, CA 95814

Daniel Alvarez  
Secretary of the Senate  
State Capitol, Room 3044  
Sacramento, CA 95814

Diane Boyer-Vine  
Legislative Counsel  
State Capitol, Room 3021  
Sacramento, CA 95814

E. Dotson Wilson  
Chief Clerk of the Assembly  
State Capitol, Room 3196  
Sacramento, CA 95814

## California State University Report: Preliminary Institutional Financial Aid Programs

As required by Section 66021.1 of the Education Code, enclosed is the California State University's (CSU) Preliminary Institutional Financial Aid Report for the 2015/16 academic year. This year's report also includes information on the California DREAM loan program as required by Section 70035 (g) (1) (2) of the Education Code.

As CSU has consistently reported over the years, we have found that more than half of CSU's students will graduate without any education loan debt. Of those that did incur debt, the average debt load was lower than the California and national averages. Specifically, some of the highlights on CSU financial aid report includes:

- In 2015-16 80% of all CSU students (372,000) received nearly \$4.2 Billion in total financial assistance.
- 73% of undergraduate financial aid recipients have their tuition fees fully covered by State University Grants, Cal Grants or waivers.

---

### 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

**Institutional Aid Preliminary Report**

January 26, 2017

Page 2

- More than half (51 percent) of CSU baccalaureate recipients graduated with zero education loan debt.
- Of the 49 percent who graduated with debt, the average loan debt of \$15,531 is lower than the California average of \$22,191 and well below the national average of \$30,100.
- State mandated fee waivers represent nearly \$46 Million in foregone revenue to CSU campuses.

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:

Full report posted to [www.calstate.edu/budget/fybudget/legislative-reports/](http://www.calstate.edu/budget/fybudget/legislative-reports/)

- c: Timothy P. White, Chancellor, California State University  
Loren Blanchard, Executive Vice Chancellor and Chief Academic Officer  
Garrett Ashley, Vice Chancellor, University Relations and Advancement  
Ryan Storm, Assistant Vice Chancellor for Budget  
Kathleen Chavira, Assistant Vice Chancellor, Advocacy and State Relations  
Kara Perkins, Executive Budget Director  
Dean Kulju, Director, Student Financial Aid Services and Programs, Student Academic Support

---

## 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 preliminary 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 90<sup>th</sup> percentile undergraduate institutional aid award amount provided per recipient for the prior two academic years and the current academic year.

(4) The average and 90<sup>th</sup> 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 is 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 2016-17 is \$661 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 \$841.

## **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 \$2,462.



**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 \$1,173.

**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 2015-2016, 2,932 students received campus fee grants for a total of \$3,629,651.

**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 \$2,381.

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 \$10,001.

**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 2015-16, 226 students received funding for a total of \$861,585.

**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 2015-16, 409 students received funding for a total of \$3,278,796.

**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 2015-16, 19 students received funding for a total of \$199,253.

**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 2015-16, 858 students received funding for a total of \$2,792,524.

**California Dream Loan**

*\* New\** The California Dream Loan was established in the 2015-16 academic year. For the 2015-16 academic year, \$2 million was allocated Systemwide. Of this, \$1m million lottery fund revenues and \$1 million state general fund was allocated to 22 CSU campuses based on eligible student population. In 2015-16, 207 students received funding for a total of \$378,687. See California Dream Loan chart for additional information.

**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 2015-16.

**Mandatory Fee Waiver Programs**

The *CSU Mandatory Waiver Report on page 10* 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).

**Undergraduate Institutional Aid Recipients**

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

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

2015-2016	Avg	90th Percentile
Amount	\$4,487	\$6,122

2016-2017	Avg	90th Percentile
Amount	\$4,500	\$6,130

**Undergraduate Need-based Institutional Aid Recipients**

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.

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

\* *Dependent students*

In 2015-2016; 144,305 CSU undergraduates (35% of enrolled students) received funding from this source. Their financial characteristics and average institutional aid award are presented below.

2015-2016	Avg	90th Percentile
Parent Income *	\$27,815	\$55,736
Expected Family Contribution	\$721	\$2,792
Financial Need	\$19,814	\$25,676

\* *Dependent students*

**Effectiveness of Institutional Aid Programs**

The following information is from the 2015-2016 academic year:

Nearly 80% of *all* CSU students receive some form of financial assistance and 73% 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 2014-2015 academic year:

2014-2015	Amount of Debt	% with Debt
CSU Average	\$15,531	49%
California Average	\$22,191	54%
National Average	\$30,100	68%

CSU students are about 49% below the national average and approximately 31% below the state average.

Source: The Project on Student Debt "Student Debt and the Class of 2015", December 2016

**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 2015-2016, there were 293,855 CSU undergraduates who demonstrated financial need and received funding. This number represents approximately 72 percent of the college year undergraduate headcount enrollment of 409,170 undergraduates for 2015-2016.

**2015-16 Undergraduates**

Aggregate Need and Aid	Students	Dollars	Avg
Cost of Attendance	293,838	\$6,013,585,672	\$20,466
Expected Family Contribution	293,823	\$781,825,587	\$2,661
Financial Need	293,823	\$5,231,522,489	\$17,805
Outside Scholarships & Other Resources	20,840	\$48,599,588	\$2,332
Federal Gift Aid	217,223	\$965,011,682	\$4,442
State Gift Aid (Cal Grants)	121,115	\$633,070,151	\$5,227
Institutional Non-need-based Gift Aid	19,025	\$60,608,724	\$3,186
Institutional Need-based Gift Aid	132,813	\$586,762,787	\$4,418
All Scholarships & Grant Aid	276,725	\$2,342,911,759	\$8,467
Balance of Need after Gift Aid	290,001	\$2,898,050,946	\$9,993
Total Work-Study	7,037	\$19,514,983	\$2,773
Total Loans	143,253	\$1,019,848,925	\$7,119
Total Financial Aid	293,855	\$3,382,275,667	\$11,510
Outstanding/Unmet Need	258,119	\$1,976,552,015	\$7,658



**2016-17 Undergraduates**

Aggregate Need and Aid	Students	Dollars	Avg
Cost of Attendance	295,000	\$6,053,400,000	\$20,520
Expected Family Contribution	295,000	\$796,500,000	\$2,700
Financial Need	295,000	\$5,256,900,000	\$17,820
Outside Scholarships & Other Resources	20,900	\$50,578,000	\$2,420
Federal Gift Aid	220,000	\$990,000,000	\$4,500
State Gift Aid (Cal Grants)	123,500	\$652,080,000	\$5,280
State Scholarship (MCS)	40,000	\$50,000,000	\$1,250
Institutional Non-need-based Gift Aid	19,200	\$62,016,000	\$3,230
Institutional Need-based Gift Aid	133,500	\$595,410,000	\$4,460
All Scholarships & Grant Aid	277,830	\$2,400,084,000	\$9,103
Balance of Need after Gift Aid	291,165	\$2,856,816,000	\$9,807
Total Work-Study	7,000	\$19,110,000	\$2,730
Total Loans	143,812	\$1,028,255,800	\$7,150
Total Financial Aid	295,000	\$3,447,449,800	\$11,686
Outstanding/Unmet Need	258,125	\$1,954,206,216	\$7,571

**2017-18 Undergraduates**

Aggregate Need and Aid	Students	Dollars	Avg
Cost of Attendance	297,000	\$6,118,200,000	\$20,600
Expected Family Contribution	297,000	\$807,840,000	\$2,720
Financial Need	297,000	\$5,310,360,000	\$17,880
Outside Scholarships & Other Resources	21,000	\$51,450,000	\$2,450
Federal Gift Aid	221,000	\$1,016,600,000	\$4,600
State Gift Aid (Cal Grants)	124,500	\$666,075,000	\$5,350
State Scholarship (MCS)	40,000	\$68,000,000	\$1,700
Institutional Non-need-based Gift Aid	19,300	\$62,725,000	\$3,250
Institutional Need-based Gift Aid	133,900	\$602,550,000	\$4,500
All Scholarships & Grant Aid	279,714	\$2,467,400,000	\$9,396
Balance of Need after Gift Aid	293,139	\$2,842,960,000	\$9,698
Total Work-Study	7,100	\$19,525,000	\$2,750
Total Loans	144,787	\$1,042,466,400	\$7,200
Total Financial Aid	297,000	\$3,529,391,400	\$11,883
Outstanding/Unmet Need	259,875	\$1,923,446,088	\$7,401

**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.

2016-2017 Academic Year	Parent Income				
	\$20,000	\$40,000	\$60,000	\$80,000	\$100,000
Cost of Attendance	\$24,205	\$24,205	\$24,205	\$24,205	\$24,205
Parent Contribution	\$0	\$431	\$3,669	\$8,167	\$14,780
Financial Need	\$24,205	\$23,774	\$20,536	\$16,038	\$9,425
Typical Financial Aid Package					
Federal Pell Grant	\$5,815	\$5,365	\$2,165	\$0	\$0
Federal SEOG	\$800	\$750	\$0	\$0	\$0
Cal Grant	\$1,670	\$5,472	\$0	\$0	\$0
State University Grant	\$5,472	\$0	\$5,472	\$0	\$0
State Scholarship (MCS)	\$0	\$0	\$0	\$1,641	\$1,641
Federal Work-Study & Student Loans	\$10,448	\$12,187	\$12,899	\$14,397	\$7,784
Total Student Financial Aid	\$24,205	\$23,774	\$20,536	\$16,038	\$9,425

Table 1.1 Institutional Aid Expenditures								
	Actual 2014-2015		Actual 2015-2016		Projected 2016-2017		Projected 2017-2018	
	Students	Dollars	Students	Dollars	Students	Dollars	Students	Dollars
<b>State University Grants</b>								
Undergraduate	120,881	\$564,538,500	120,881	\$565,760,516	122,000	\$579,500,000	124,000	\$595,200,000
Graduate/Postbaccalaureate	15,310	\$82,264,642	14,237	\$76,508,552	14,500	\$81,883,800	14,800	\$82,880,000
All Students	136,191	\$646,803,142	135,118	\$642,269,068	136,500	\$661,383,800	138,800	\$678,080,000
<b>Educational Opportunity Program (EOP) Grants</b>								
Undergraduate	21,437	\$17,152,470	21,692	\$18,232,208	21,700	\$18,030,973	21,700	\$18,030,973
Graduate/Postbaccalaureate	0	\$0	0	\$0	0	\$0	0	\$0
All Students	21,437	\$17,152,470	21,692	\$18,232,208	21,700	\$18,030,973	21,700	\$18,030,973
<b>Graduate Equity Fellowships</b>								
Undergraduate	0	\$0	0	\$0	0	\$0	0	\$0
Graduate/Postbaccalaureate	264	\$657,653	357	\$878,866	330	\$825,000	350	\$875,000
All Students	264	\$657,653	357	\$878,866	330	\$825,000	350	\$875,000
<b>CSU Future Scholars Program Awards</b>								
Undergraduate	373	\$438,249	342	\$401,215	360	\$424,800	380	\$448,400
Graduate/Postbaccalaureate	0	\$0	0	\$0	0	\$0	0	\$0
All Students	373	\$438,249	342	\$401,215	360	\$424,800	380	\$448,400
<b>Campus Fee Grants</b>								
Undergraduate	2,037	\$3,151,079	2,871	\$3,514,981	2,500	\$4,000,000	2,550	\$4,080,000
Graduate/Postbaccalaureate	50	\$121,641	61	\$114,670	62	\$148,800	64	\$153,600
All Students	2,087	\$3,272,720	2,932	\$3,629,651	2,562	\$4,148,800	2,614	\$4,233,600
<b>Institutional Scholarships</b>								
Undergraduate	19,996	\$44,128,441	22,555	\$49,774,971	22,800	\$50,388,000	23,000	\$50,830,000
Graduate/Postbaccalaureate	4,342	\$13,370,303	4,511	\$14,659,219	4,550	\$14,560,000	4,600	\$14,720,000
All Students	24,338	\$57,498,744	27,066	\$64,434,190	27,350	\$64,948,000	27,600	\$65,550,000
<b>Athletic Scholarships &amp; Grants</b>								
Undergraduate	4,605	\$38,184,678	4,646	\$46,176,259	4,700	\$43,240,000	4,720	\$43,896,000
Graduate/Postbaccalaureate	81	\$996,358	76	\$1,048,049	75	\$975,000	75	\$982,500
All Students	4,686	\$39,181,036	4,722	\$47,224,308	4,775	\$44,215,000	4,795	\$44,878,500
<b>Education Doctorate Grants</b>								
Undergraduate	204	\$892,809	226	\$861,585	230	\$989,000	240	\$1,080,000
<b>Doctorate of Physical Therapy Grants</b>								
Undergraduate	420	\$3,747,929	409	\$3,278,796	420	\$3,570,000	425	\$3,612,500
<b>Doctorate of Nursing Grants</b>								
Undergraduate	21	\$278,762	19	\$199,253	25	\$325,000	25	\$337,500
<b>Graduate Business Grant</b>								
Undergraduate	44	\$94,196	21	\$58,204	30	\$78,000	30	\$81,000
Graduate/Postbaccalaureate	896	\$2,740,557	837	\$2,734,320	850	\$2,720,000	860	\$2,795,000
All Students	940	\$2,834,753	858	\$2,792,524	880	\$2,798,000	890	\$2,876,000
<b>Subtotal-Grants &amp; Scholarships</b>								
Undergraduate	148,477	\$664,030,893	152,147	\$682,108,083	152,851	\$695,661,773	154,862	\$712,566,373
Graduate/Postbaccalaureate	19,450	\$106,050,013	18,382	\$100,862,031	18,664	\$104,682,600	19,016	\$106,018,600
All Students	167,927	\$770,080,906	170,529	\$782,970,114	171,515	\$800,344,373	173,878	\$818,584,973
<b>Institutional Long-Term Educational Loans</b>								
Undergraduate	29	\$117,327	37	\$137,223	40	\$160,000	40	\$164,000
Graduate/Postbaccalaureate	2	\$3,572	1	\$5,000	2	\$6,000	2	\$6,000
All Students	31	\$120,899	38	\$142,223	42	\$166,000	42	\$170,000
<b>Unduplicated Students and Total Awards</b>								
Undergraduate	148,489	\$664,148,220	152,223	\$682,606,933	152,786	\$695,821,773	154,885	\$712,730,373
Graduate/Postbaccalaureate	19,451	\$106,053,585	18,386	\$100,882,391	18,665	\$104,688,600	19,017	\$106,024,600
All Students	167,940	\$770,201,805	170,609	\$783,489,324	171,451	\$800,510,373	173,902	\$818,754,973
<b>Waivers of State Tuition Fee</b>								
Undergraduate	12,742	\$51,665,918	13,595	\$56,414,109	13,700	\$57,540,000	13,800	\$59,340,000
Graduate/Postbaccalaureate	2,858	\$12,394,207	2,889	\$12,674,925	2,900	\$13,050,000	2,900	\$13,050,000
All Students	15,600	\$64,060,125	16,484	\$69,089,034	16,600	\$70,590,000	16,700	\$72,390,000
<b>Unduplicated Students and Total Assistance</b>								
Undergraduate	160,369	\$715,814,138	164,861	\$739,004,365	165,520	\$753,361,773	167,707	\$772,070,373
Graduate/Postbaccalaureate	21,982	\$118,447,792	20,893	\$113,573,993	21,177	\$117,738,600	21,522	\$119,074,600
All Students	182,351	\$834,261,930	185,754	\$852,578,358	186,697	\$871,100,373	189,229	\$891,144,973

## CSU Preliminary Mandatory Waiver Report

	2014/15 Reported	2015/16 Reported	2016/17 Budget	2017/18 Budget
<b>Number of Fee Waivers</b>				
<b>Cal Vet/Medal of Honor</b>	<b>8,031</b>	<b>8,514</b>	<b>8,514</b>	<b>8,514</b>
<i>Undergraduate</i>	7,598	8,059	8,059	8,059
<i>Graduate</i>	433	455	455	455
<b>Alan Pattee</b>	<b>37</b>	<b>35</b>	<b>35</b>	<b>35</b>
<i>Undergraduate</i>	35	33	33	33
<i>Graduate</i>	2	2	2	2
<b>Minimum/Average/Maximum Waiver</b>				
<b><i>Cal Vet/Medal of Honor</i></b>				
<i>Undergraduate</i>				
Minimum	\$0	\$0	\$0	\$0
Average	\$5,339	5,342	5,342	5,342
Maximum	\$5,472	\$5,472	\$5,472	\$5,472
<i>Graduate</i>				
Minimum	\$0	\$0	\$0	\$0
Average	\$6,001	5,956	5,956	5,956
Maximum	\$6,738	\$6,738	\$6,738	\$6,738
<b><i>Alan Pattee</i></b>				
<i>Undergraduate</i>				
Minimum	\$0	\$0	\$0	\$0
Average	\$5,362	5,343	5,343	5,343
Maximum	\$5,472	\$5,472	\$5,472	\$5,472
<i>Graduate</i>				
Minimum	\$0	\$0	\$0	\$0
Average	\$6,738	6,738	6,738	6,738
Maximum	\$6,738	\$6,738	\$6,738	\$6,738
<b>Aggregate Cost of Waivers</b>				
<b><i>Cal Vet/Medal of Honor</i></b>				
Undergraduate	\$40,566,942	\$43,047,904	\$43,047,904	\$43,047,904
Graduate	2,599,619	2,707,194	2,707,194	2,707,194
	<u>\$43,166,561</u>	<u>\$45,755,098</u>	<u>\$45,755,098</u>	<u>\$45,755,098</u>
<b><i>Alan Pattee</i></b>				
Undergraduate	\$186,807	174,510.18	\$174,510	\$174,510
Graduate	10,107	11,252	11,252	11,252
	<u>\$196,914</u>	<u>\$185,763</u>	<u>\$185,763</u>	<u>\$185,763</u>
Mandatory Waivers	\$40,402,149	\$45,940,860	\$45,940,860	\$45,940,860
Other Required Waivers	25,333,011	21,801,976	21,801,976	21,801,976
Total Funded Waivers Cost	<u>\$65,735,160</u>	<u>\$67,742,836</u>	<u>\$67,742,836</u>	<u>\$67,742,836</u>
Total Funded Waivers	13,256	14,404	14,404	14,404



Section 70035 of the California Education Code directs the California State University to report annually to the Legislature on the DREAM loan program. The following information is provided in response to the request which reads as follows:

- (g) (1) The California State University and the University of California shall annually report to the Legislature as part of their respective annual financial aid reports the dollar amount of each DREAM loan awarded and number of students for whom a DREAM loan was awarded that academic year.
- (2) Each institution, including an institution described in subdivision (f), shall annually report all of the following:
  - (A) The total amount of funding in the institution’s DREAM revolving fund.
  - (B) The annual amount contributed by the state to the institution’s DREAM revolving fund.
  - (C) The annual amount contributed by the institution to the institution’s DREAM revolving fund.
  - (D) The annual administrative costs of the DREAM Program at the institution.

<b>CA Dream Loan</b>				
<b>2015-2016</b>				
<b>Campus</b>	<b>State General Fund</b>	<b>Lottery Funds</b>	<b>Total Funding</b>	<b>Annual Administrative Cost</b>
Bakersfield	\$22,400	\$22,400	\$44,800	\$467
Channel Islands	\$9,150	\$9,150	\$18,300	\$0
Chico	\$17,250	\$17,250	\$34,500	\$0
Dominguez Hills	\$40,950	\$40,950	\$81,900	\$0
East Bay	\$21,750	\$21,750	\$43,500	\$0
Fresno	\$51,800	\$51,800	\$103,600	\$0
Fullerton	\$97,550	\$97,550	\$195,100	\$0
Humboldt	\$5,500	\$5,500	\$11,000	\$0
Long Beach	\$101,400	\$101,400	\$202,800	\$0
Los Angeles	\$101,400	\$101,400	\$202,800	\$0
Maritime	\$0	\$0	\$0	\$0
Monterey Bay	\$10,700	\$10,700	\$21,400	\$0
Northridge	\$116,000	\$116,000	\$232,000	\$0
Pomona	\$69,750	\$69,750	\$139,500	\$0
Sacramento	\$49,750	\$49,750	\$99,500	\$0
San Bernardino	\$50,700	\$50,700	\$101,400	\$0
San Diego	\$29,250	\$29,250	\$58,500	\$1,375
San Francisco	\$63,650	\$63,650	\$127,300	\$1,114
San Jose	\$52,450	\$52,450	\$104,900	\$0
San Luis Obispo	\$21,450	\$21,450	\$42,900	\$3,655
San Marcos	\$25,750	\$25,750	\$51,500	\$0
Sonoma	\$18,850	\$18,850	\$37,700	\$1,885
Stanislaus	\$22,550	\$22,550	\$45,100	\$0
<b>Total</b>	<b>\$1,000,000</b>	<b>\$1,000,000</b>	<b>\$2,000,000</b>	<b>\$8,496</b>

## FINAL REPORT: Aggregate Summary of Financial Aid Awarded

**2015-2016 Student Financial Assistance by Student Level**

<b>Undergraduates</b>	<b>Number</b>	<b>Total</b>	<b>Mean</b>
Pell Grant	218,166	\$949,375,351	\$4,352
SEOG Grant	26,507	\$13,328,611	\$503
BIA Grant	204	\$705,454	\$3,458
Chafee Grant	550	\$2,544,027	\$4,626
Federal Teach Grant	118	\$355,538	\$3,013
Other Federal Grant	773	\$1,964,368	\$2,541
Direct Loan-Subsidized	137,304	\$563,491,694	\$4,104
Direct Loan- Unsubsidized	107,265	\$485,574,291	\$4,527
Parent Loan	13,364	\$165,719,529	\$12,400
Perkins Loan	3,136	\$7,741,304	\$2,469
Nursing Student Loan	119	\$378,590	\$3,181
Federal Work-Study	7,044	\$19,527,801	\$2,772
Cal Grant A	30,766	\$156,836,810	\$5,098
Cal Grant B	90,618	\$477,237,712	\$5,266
Middle Class Scholarship	37,045	\$30,182,030	\$815
State University Grant	120,881	\$565,760,516	\$4,680
EOP Grant	21,692	\$18,232,208	\$841
Future Scholars Scholarship	321	\$352,215	\$1,097
Graduate Business Grant	21	\$58,204	\$2,772
Campus Fee Grant	2,871	\$3,514,981	\$1,224
Institutional Scholarship	22,552	\$49,774,971	\$2,207
Athletic Scholarship	4,646	\$46,176,259	\$9,939
Institutional Long Term Loan	37	\$137,223	\$3,709
California Dream Loan	207	\$378,687	\$1,829
Other Scholarship/Grant	19,461	\$45,657,168	\$2,346
Other Educational Loan	6,285	\$64,140,618	\$2,346
Tuition Fee Waivers	13,595	\$56,414,109	\$4,150
Americorp Grant	266	\$497,639	\$1,871
Other Resources	7,741	\$19,199,311	\$2,480
Direct Loans	164,786	\$1,220,420,587	\$7,406
Other Federal Aid Programs	219,137	\$976,393,243	\$4,456
Cal Grants	121,387	\$634,088,640	\$5,224
CSU Aid Programs & Waivers	145,361	\$641,082,810	\$4,410
All Work Study	7,044	\$19,527,801	\$2,772
All Loans	167,619	\$1,293,197,019	\$7,715
Total Aid w/Waivers	338,101	\$3,731,475,028	\$11,037
Institutional Grants	133,234	\$587,225,648	\$4,407
Work Study/Loans	170,785	\$1,312,724,820	\$7,686

**2015-2016 Student Financial Assistance by Student Level**

<b>Graduates</b>	<b>Number</b>	<b>Total</b>	<b>Mean</b>
Pell Grant	3,313	\$10,916,333	\$3,295
SEOG Grant	0	\$0	\$0
BIA Grant	22	\$89,767	\$4,080
Chafee Grant	5	\$22,500	\$4,500
Federal Teach Grant	673	\$1,912,190	\$2,841
Other Federal Grant	158	\$1,638,437	\$10,370
Direct Loan-Subsidized	4,845	\$20,240,240	\$4,178
Direct Loan- Unsubsidized	21,337	\$272,284,313	\$12,761
PLUS Loan	1,020	\$8,316,777	\$8,154
Perkins Loan	418	\$1,312,905	\$3,141
Nursing Student Loan	23	\$167,331	\$7,275
Federal Work-Study	348	\$1,019,453	\$2,929
Cal Grant A	41	\$219,738	\$5,359
Cal Grant B	56	\$337,871	\$6,033
Middle Class Scholarship	611	\$521,523	\$854
Graduate Equity Fellowship	349	\$863,966	\$2,476
State University Grant	14,237	\$76,508,552	\$5,374
Doctor of Education Grant	222	\$854,280	\$3,848
Doctor of Physical Therapy Grant	372	\$3,035,443	\$8,160
Doctor of Nursing Practice Grant	19	\$199,253	\$10,487
Graduate Business Grant	837	\$2,734,320	\$3,267
Campus Fee Grant	61	\$114,670	\$1,880
Institutional Scholarship	4,511	\$14,659,219	\$3,250
Athletic Scholarship	76	\$1,048,049	\$13,790
Institutional Long Term Loan	1	\$5,000	\$5,000
Other Scholarship/Grant	1,890	\$9,683,803	\$5,124
Other Educational Loan	692	\$7,416,569	\$10,718
Tuition Fee Waivers	2,889	\$12,674,925	\$4,387
Americorp Grant	137	\$419,473	\$3,062
Other Resources	1,702	\$10,971,724	\$6,446
Direct Loans	22,989	\$300,841,330	\$13,086
Other Federal Aid Programs	4,218	\$16,059,463	\$3,807
Cal Grants	101	\$579,137	\$5,734
CSU Aid Programs & Waivers	18,135	\$96,919,739	\$5,344
All Work Study	348	\$1,019,453	\$2,528
All Loans	23,427	\$309,743,135	\$13,222
Total Aid w/Waivers	33,945	\$448,867,955	\$13,223
Institutional Grants	14,849	\$80,712,198	\$5,436
Work Study/Loans	23,556	\$310,762,588	\$13,193

**2015-2016 Student Financial Assistance**

<b>All Students</b>	<b>Number</b>	<b>Total</b>	<b>Mean</b>
Pell Grant	221,479	\$960,291,684	\$4,336
SEOG Grant	26,507	\$13,328,611	\$503
BIA Grant	226	\$795,221	\$3,519
Chafee Grant	555	\$2,566,527	\$4,624
Federal Teach Grant	791	\$2,267,728	\$2,867
Other Federal Grant	931	\$3,602,805	\$3,870
Direct Loan-Subsidized	142,149	\$583,731,934	\$4,106
Direct Loan- Unsubsidized	128,602	\$757,858,604	\$5,893
Parent Loan	13,364	\$165,719,529	\$12,400
Graduate PLUS Loan	1,458	\$13,951,860	\$9,569
Perkins Loan	3,554	\$9,054,209	\$2,548
Nursing Student Loan	142	\$545,921	\$3,845
Federal Work-Study	7,392	\$20,547,254	\$2,780
Cal Grant A	30,807	\$157,056,548	\$5,098
Cal Grant B	90,674	\$477,575,583	\$5,267
Middle Class Scholarship	37,656	\$30,703,553	\$815
Graduate Equity Fellowship	357	\$878,866	\$2,462
State University Grant	135,118	\$642,269,068	\$4,753
EOP Grant	21,692	\$18,232,208	\$841
Doctor of Education Grant	226	\$861,585	\$3,812
Doctor of Physical Therapy Grant	409	\$3,278,796	\$8,017
Doctor of Nursing Practice Grant	19	\$199,253	\$10,487
Future Scholars Scholarship	342	\$401,215	\$1,173
Graduate Business Grant	858	\$2,792,524	\$3,255
Campus Fee Grant	2,932	\$3,629,651	\$1,238
Institutional Scholarship	27,063	\$64,434,190	\$2,381
Athletic Scholarship	4,722	\$47,224,308	\$10,001
Institutional Long Term Loan	38	\$142,223	\$3,743
California Dream Loan	207	\$378,687	\$1,829
Other Scholarship/Grant	21,351	\$55,340,971	\$2,592
Other Educational Loan	6,977	\$71,557,187	\$10,256
Tuition Fee Waivers	16,484	\$69,089,034	\$4,191
Americorp Grant	403	\$917,112	\$2,276
Other Resources	9,443	\$30,171,035	\$3,195
Direct Loans	187,775	\$1,521,261,927	\$8,102
Other Federal Aid Programs	223,355	\$992,452,706	\$4,443
Cal Grants	121,488	\$634,667,777	\$5,224
CSU Aid Programs & Waivers	163,496	\$738,002,549	\$4,514
All Work Study	7,392	\$20,547,254	\$2,780
All Loans	191,046	\$1,602,940,154	\$8,390
Total Aid w/Waivers	372,046	\$4,180,342,983	\$11,236
Institutional Grants	148,083	\$667,937,846	\$4,511
Work Study/Loans	194,341	\$1,623,487,408	\$8,354