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To: Provosts/Vice Presidents Student Affairs

From: Allison G. Jones

Subject: State University Grant Awarding Policy - Clarification

On March 8, 2001, campuses received information about revisions to student eligibility and awarding policies for the State University Grant (SUG) program effective with the summer 2001 term. The revised awarding policy included provision for maximum grant amounts for an academic year of the lesser of -

- Up to \$3,600 for full-time enrollment;
- Up to \$2,400 for less than full-time enrollment;
- An amount which in combination with any fee-designated award such as a Cal Grant or fee waiver does not exceed \$3,600 for full-time enrollment or \$2,400 for less than full-time enrollment, e.g., if a student enrolled full time receives a \$1,428 Cal Grant, the maximum State University Grant would be \$2,172 (\$3,600 - \$1,428); or
- An amount which in combination with all other financial aid the student is scheduled to receive does not exceed the student's evaluated financial need for the applicable term(s) of enrollment.

The awarding policy also included a provision for maximum awards to be prorated on the basis of the percentage that the term represents to an academic year for students enrolling for less than an academic year, e.g., the maximum for full-time enrollment for one semester is \$1,800, and the maximum for full-time enrollment for one quarter is \$1,200.

Increasing the maximum allowable award above the level of the assessed State University Fee was intended to provide each campus with greater flexibility in establishing awarding policies and priorities to address its unique enrollment management goals and the higher maximum for students enrolling in at least 12 units per term was designed to provide a greater incentive for full-time enrollment.

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At that time, the new maximum awards were significantly higher than the State University Fee amounts to be assessed for the 2001-02 academic year. The \$3,600 maximum awards for full-time students (12 units or more) compared to a State University Fee of \$1,428 for undergraduates and \$1,506 for graduate and postbaccalaureate students who enrolled in more than 6 units per term. The \$2,400 maximum award for students enrolled in fewer than 12 units per term was also still higher than the \$1,428 or \$1,506 fee assessed of students enrolling in 6.1 to 11.9 units and higher still than the \$828 and \$876 fee assessed of students enrolling in 6 or fewer units per term.

The fee increases for the 2004-05 academic year mean that the \$2,400 maximum award established in 2001 for students enrolling in fewer than 12 units per term is actually less than the actual State University Fee assessed of students enrolling in 6.1 to 11.9 units in the categories for students enrolled in teaching credential programs paying a fee of \$2,706 per academic year, and graduate and other postbaccalaureate students who pay a fee of \$2,820.

One of the objectives of the State University Grant program is to provide assistance to the most needy students (reflected by the expected family contribution) to ensure that the amount of the State University Fee that is assessed is offset by a combination of State University Grant and other fee-designated awards (e.g., Cal Grant fee awards or fee waivers.)

In those instances where the State University Fee actually assessed of a student is greater than the \$2,400 academic year amount specified for students enrolling on less than a full-time basis, the maximum State University Grant shall be the amount of the assessed State University Fee for an amount that when combined with other fee-designated awards does not exceed the amount of the assessed fee.

Questions regarding the State University Grant program and awarding policy may be directed to Ms. Mary L. Robinson, Associate Director for Student Financial Aid, Academic Affairs, Student Academic Support, at (562) 951-4737 or mlrobinson@calstate.edu.

AGJ/mlr

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