

Date of Hearing: June 15, 2021

ASSEMBLY COMMITTEE ON HIGHER EDUCATION

Jose Medina, Chair

SB 737 (Limón) – As Introduced February 19, 2021

**SENATE VOTE:** 32-7

**SUBJECT:** California Student Opportunity and Access Program.

**SUMMARY:** Makes several changes to the California Student Opportunity and Access program (Cal-SOAP), including the modification of the criteria that the California Student Aid Commission (CSAC) utilizes to allocate funding for support projects; and, allows the CSAC to allocate up to 2% of program funding for administration, data collection, and evaluation. Specifically, **this bill:**

*Funding Criteria*

- 1) Authorizes the CSAC to allocate funding to support projects designed to increase the accessibility of postsecondary educational opportunities and financial aid for pupils from underserved communities, who meet one or more of the following criteria:
  - a) Are from low-income families;
  - b) Would be the first in their families to attend a postsecondary educational institution;
  - c) Are from schools or geographic regions with documented low postsecondary education eligibility or participation rates;
  - d) Are homeless youth or former homeless youth, as defined, or who are at risk of becoming homeless;
  - e) Are from mixed immigrant status households or who themselves are immigrants;
  - f) Are current or former foster youth, as defined;
  - g) Identify as being LGBTQ+; and,
  - h) Are part of a historically underserved minority group.
- 2) Requires that CSAC allocate up to 2% of funding for program administration, data collection, and evaluation.
- 3) Specifies that any funds allocated, for that purpose, pursuant to (2) above, is not subject to existing match funding requirements.

*Project Duties and Responsibilities*

- 4) Modifies project requirements as follows:

- a) Specifies, in addition to increasing the availability of information for students on the existence of postsecondary education, that projects also inform students of the total cost of attending a postsecondary education institution, and financing options including, grants, scholarships, student loans, as well as work opportunities;
  - b) Removes “raising achievement levels of students,” as a primary responsibility of projects;
  - c) Requires that projects increase the number of pupils submitting completed financial aid applications including the Free Application for Federal Student Aid (FAFSA) or the California Dream Act Application (CADAA), and assist students as needed with the financial aid verification process; and,
  - d) Requires that projects hire undergraduate or graduate students to serve as college success coaches to mentor students, encourage a college-going culture, help students plan for their postsecondary education, and help students complete financial aid applications. Encourages projects to hire college success coaches with similar backgrounds as students.
- 5) Authorizes projects to assist first-year students at four-year institutions, to the extent resources are available.
- 6) Authorizes projects to assist middle school pupils, *instead of pupils in grades five and six*, inclusive, who are from low-income families and/or underserved community, as specified.
- 7) Requires projects to assist high school pupils, who are from low-income families or from the specified underserved communities, and their parents, in order to provide information on college preparation, understanding the total cost of attending a postsecondary educational institution, and to assist with completion of financial aid applications. Under the provisions of bill, projects are encouraged to leverage CSAC outreach efforts, such as Cash for College workshops, to assist their students with completing the FAFSA or the CADAA.
- 8) Requires that each project establish or strengthen regional collaborative relationships and partnerships.

#### *Project Administration*

- 9) Deems that the governing board of each project have approval authority of the project director.
- 10) Requires that each project maintain a comprehensive student data system on students receiving services through the program in middle and high school within the participating school districts. The bill maintains existing provisions, which provide that information maintained by projects be done in a manner consistent with the law relating to student records. The bill further authorizes CSAC to require that each project submit on a periodic basis to the Commission or a grantee designee, certain outreach metrics for the purpose of evaluating the effectiveness of the program and the project, including but not limited to, the individual records of high school students served, services performed by the project, the number of students that completed the FAFSA or the CADAA, and the number of students who are eligible for postsecondary enrollment.

- 11) Modifies the provision that at least 30% or the equivalent of each project grant be allocated for stipends to include college success coaches and for any costs associated with providing training or necessary supplies and equipment to the college success coaches who meet all of the following criteria:
- a) Work with middle and high school pupils;
  - b) Are currently enrolled in a college or other postsecondary education institution as an undergraduate or graduate student; and,
  - c) Have demonstrated financial need, as defined by CSAC, for the stipend.

*Miscellaneous*

- 12) Authorizes CSAC to adopt regulations necessary for the implementation and evaluation of Cal-SOAP and individual projects.
- 13) Repeals provisions that allows an initial grant be used for planning and development and repeals provisions specifying that full project funding be allocated when the consortium meets the established criteria.
- 14) Makes various changes to legislative findings and declarations and further includes, in part, that awareness of financial aid options has historically been a barrier for first-generation students and students from minority backgrounds trying to access a postsecondary education. Research shows that students unaware of their financial aid options and have misconceptions of eligibility, leading many to not complete the financial aid process.
- 15) Deletes references to “achievement level,” throughout the bill.
- 16) Define various terms for the purposes of the bill.
- 17) Makes other technical and conforming changes.

**EXISTING LAW:**

- 1) Authorizes CSAC as the administrators of Cal-SOAP, to apportion funds on a progress payment schedule for the support of projects designed to increase the accessibility of postsecondary educational opportunities for any of the following elementary and secondary school pupils:
- a) Are from low-income families;
  - b) Would be the first in their families to attend college;
  - c) Are from schools or geographic regions with documented low-eligibility or college participation rates; and,
  - d) Are homeless youth and former homeless youth, as defined.

- 2) Requires that the projects be proposed and operated through a consortium that involves at least one secondary school district office, at least one four-year college or university, at least one community college, and at least one agency, as specified.
- 3) Requires that each project maintain within the project headquarters a comprehensive pupil-specific information pupil data system on pupils receiving services through the program in grades 11 and 12 at secondary schools (middle and high schools) within the participating districts. Requires that the information be maintained in a manner consistent with the law relating to pupil records.
- 4) Authorizes CSAC to develop additional regulations regarding the awarding of project grants and criteria for evaluating the effectiveness of the individual projects (Education Code Section 69561).

**FISCAL EFFECT:** According to the Senate Appropriations Committee:

- 1) The Cal-SOAP is currently budgeted at \$7.9 million General Fund (GF) and funds 16 local projects throughout the state. The bill's provisions could potentially result in additional, but unknown GF cost pressure for the state. Specifically, the bill expands the population of students being assisted under the program to include first year college students, to the extent that resources are available. The bill also allows up to 2% of program funds to be allocated for administrative activities which could result in funds being diverted from direct student services.
- 2) The bill provides additional oversight responsibilities and authority for CSAC. For example, it authorizes the CSAC to require that each project submit certain outreach metrics for the purpose of evaluating the effectiveness of the program. The bill also authorizes CSAC to adopt regulations necessary for the implementation and evaluation of the program and projects. However, the CSAC indicates any state operations costs resulting from the bill could be absorbed within existing resources.

**COMMENTS:** *Background.* Established by the Legislature in 1978 and administered by CSAC, over 40 years later, Cal-SOAP remains instrumental in improving the flow of information about postsecondary education and financial aid while raising the achievement levels of at-risk populations throughout the state. Currently, 16 Cal-SOAP projects operate throughout California by consortia made up of secondary and postsecondary schools and community agencies. Current Cal-SOAP projects include: Central Coast (Santa Maria), Central Valley (San Joaquin), East Bay/Solano (Oakland, Richmond and Solano County), Inland Empire (through CSU San Bernardino), Long Beach, Los Angeles, Merced, Northcoast (Eureka), Riverside, Sacramento, San Diego/Imperial, San Francisco, San Jose, Santa Barbara, South County Gilroy, and South San Joaquin. Annual state funding for Cal-SOAP totals \$7.9 million, or about \$493,750 per consortium.

Because each project specializes in serving students within its community, the types of programs and services may differ. However, the projects share the common goal of improving the flow of information about postsecondary education and financial aid while raising achievement levels of targeted students. Some common services provided by the consortia include advising, tutoring, parent outreach, and college awareness workshops.

The measure newly authorizes CSAC to collect data from projects and evaluate project effectiveness. Additionally this measure allows for 2% of program funds to cover program administration costs. This money would not be subject to matching funding requirements.

Assembly Bill 584 (Quirk-Silvia), Chapter 500, Statutes of 2017, required the CSAC, contingent upon sufficient funding, ensure that at least one Cal-SOAP consortium be established in Orange County.

*While the intent of this measure is not to create a Cal-SOAP consortium in Orange County, moving forward, the author may wish to work with the Assembly Member from Orange County, CSAC, the Department of Finance, and the appropriate Legislative Budget Committees, in order to have an Orange County Cal-SOAP consortium be established and comply with the statutory changes of this measure.*

*Need for this measure.* According to the author, “The Cal-SOAP currently has a statutory mandate to improve access to higher education by raising the achievement level and increasing college eligibility of underserved students.” The author contends that, “While these goals are important, there are numerous government-funded programs - such as AVID, TRIO and GEAR UP- that already provide these services and are working to close the opportunity gap in higher education.”

The author states, “Thus, SB 737 would help to reposition the Cal-SOAP program as the premier financial aid awareness and assistance program and avoid duplicative state outreach efforts.” The author argues that, “SB 737 intends to accomplish this goal by updating the governing statutes so that Cal-SOAP projects would focus on helping students and families to: understand the true costs of college or other postsecondary programs; understand their financing options - including grants, scholarships, student loans, and work opportunities; and apply for financial aid using the FAFSA or CADAA.”

Further, the author argues that, “Unfortunately, there is a lack of outreach efforts that focus on helping students fully understand the true cost of attendance, how to pay for college, and supporting them through the financial aid application process altogether. We must ensure that students of low-income backgrounds and other historically underserved backgrounds are equipped with the necessary financial knowledge to pursue a college education.”

Additionally, the author states that, “Access to financial aid is now more important than ever. The COVID-19 pandemic has yielded significant loss in income for so many of our students and their families. To offset the long-term economic impacts of our state’s economy, we must ensure that we invest in our students so that they can pursue higher education and know that there is financial aid available.”

Lastly, the author contends that, “SB 737 aligns with recent efforts by the Administration and the Legislature to increase financial aid access for all eligible students by requiring financial aid application completion among high school seniors.”

*Committee comments.* This measure shifts the current focus of Cal-SOAP. The Cal-SOAP projects provide services directly to pupils in middle and high schools and are designed to increase the availability of information on postsecondary schooling and work opportunities.

These projects also work to raise the achievement level of said pupils so as to increase the number of high school graduates eligible to pursue postsecondary learning opportunities.

This measure shifts Cal-SOAP's focus away from "raising student achievement," as one of its primary functions toward increasing access to financial aid programs. Although "raising academic achievement" is important, the author argues that this work is duplicative as other government programs (mainly federal) offer these types of services. The shift toward financial aid outreach and assistance as a core responsibility of Cal-SOAP could potentially fill an information void for middle and high school pupils and their families on a topic that is complex, yet necessary to higher education access.

Specifically, this measure calls for projects to assist pupils and their families understand the true costs of college, college-financing options, and applying for student financial aid programs.

A second program administered by CSAC, the Cash for College program, has a similar mission, which provides free professional assistance to families completing state and federal financial aid applications. However, unlike the Cal-SOAP program, Cash for College programs rely on volunteers to conduct application workshops for high school seniors. Cal-SOAP projects have dedicated staff to support a range of middle school and high school pupils prepare for college.

Further, this measure would also expand the pool of students targeted for Cal-SOAP services. Currently, Cal-SOAP projects must serve low-income pupils, first-generation college pupils, pupils from schools with documented low postsecondary education participation rates, and currently and former homeless youth. This measure adds other groups of students from historically underserved communities including foster youth, LGBTQ+ students, students from mixed immigration status households, and other specified groups. The proposed changes also concentrate services for an older cohort of students.

Currently, younger pupils in elementary school could benefit from Cal-SOAP services; however, this measure explicitly refocuses programming toward middle and high school pupils. This shift is presumable because middle and high school pupils are closer to graduating.

Lastly, the measure allows projects to provide services to first-year university students, in addition to community college transfer students.

As aforementioned, this measure expands the pool of students targeted to be included on the Cal-SOAP list. While much data exists on the benefits of ensuring underrepresented student groups are able to be exposed and prepared for college, via Cal-SOAP and other programs, the State Constitution, Section 31 (as added pursuant to the passage of Proposition 209 in 1996), stipulates that the State cannot discriminate against or grant preferential treatment on the basis of race, sex, color, ethnicity, or national origin in the operation of public employment, public education, and public contracting.

*Moving forward, the author may wish to work with the Legislative Counsel and CSAC, in order to ensure portions of this measure, which appear to provide preferential treatment to specified individuals, do not violate the State Constitution.*

*Prior legislation.* AB 2819 (Limón), which died for a lack of hearing in this Committee, due to the truncated hearing schedule because of the global health pandemic, was similar in nature to this measure. And, in part, would have authorized CSAC to apportion funds under Cal-SOAP to

projects designed to increase accessibility of postsecondary educational opportunities for certain specified pupils from underserved communities. Additionally, the bill would require every Cal-SOAP consortium operating a project to allocate at least 20%, with the goal of allocating 30%, of each project grant to college success coaches meeting specified criteria.

## **REGISTERED SUPPORT / OPPOSITION:**

### **Support**

Alliance for A Better Community  
Asian Americans Advancing Justice - California  
Cal State Student Association  
Cal-SOAP LA Consortium  
California Faculty Association  
California State PTA  
California Student Aid Commission (Sponsor)  
California State Student Association  
Californians Together  
Children Now  
East Bay Consortium of Educational Institutions, Inc.  
Equal Justice Society  
Hispanic Association of Colleges and Universities (HACU)  
Humboldt County Office of Education Career and College Resources Department  
Inland Empire Immigrant Youth Collective  
John Burton Advocates for Youth  
Kid City Hope Place  
Long Beach Cal-SOAP  
Mission Graduates  
NextGen California  
North Coast Cal-SOAP Consortium  
Northern California College Promise Coalition  
Norwalk - La Mirada Unified School District  
Office of the Riverside County Superintendent of Schools  
Parent Institute for Quality Education  
Partnership for Los Angeles Schools  
San Bernardino Community College District  
San Diego and Imperial Counties Cal-SOAP  
San Jose-evergreen Community College District  
Santa Barbara Cal-SOAP Consortium  
Santa Maria Joint Union High School District  
Shaw Yoder Antwih Schmelzer & Lange  
Southern California College Access Network  
Southern San Joaquin Valley Cal-SOAP Consortium  
The Desertsong Group  
The Education Trust - West  
The Los Angeles Trust for Children's Health  
uAspire  
Watts/Century Latino Organization

**Opposition**

None on file.

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