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**AB-1858 Student financial aid: Financial Aid Shopping Sheet.** (2017-2018)

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**Assembly Bill No. 1858**

**CHAPTER 671**

An act to amend Section 69514 of, and to add Sections 66021.3 and 94912.5 to, the Education Code, relating to student financial aid.

[ Approved by Governor September 22, 2018. Filed with Secretary of State September 22, 2018. ]

**LEGISLATIVE COUNSEL'S DIGEST**

AB 1858, Calderon. Student financial aid: Financial Aid Shopping Sheet.

(1) Existing law, the Donahoe Higher Education Act, sets forth the missions and functions of the segments of postsecondary education in this state. As defined in the act, these segments include the University of California, the California State University, the California Community Colleges, and independent institutions of higher education as defined in the act, and private postsecondary educational institutions as defined in the California Private Postsecondary Education Act of 2009. Provisions of the Donahoe Higher Education Act apply to the University of California only to the extent that the Regents of the University of California act by resolution to make them applicable.

This bill would add to the Donahoe Higher Education Act a provision that would require, by January 1, 2020, and permanently thereafter, each campus of the University of California, the California State University, and the California Community Colleges, and each independent institution of higher education to provide students with the Financial Aid Shopping Sheet as developed by the United States Department of Education to inform students or individuals who have been offered admission about financial aid award packages. The bill would also require these institutions to provide the completed Financial Aid Shopping Sheet when they provide in print or electronically financial aid award packages to individuals who are offered admission to the institution. The bill would declare that this provision would apply to the University of California irrespective of any action taken by the regents to make it applicable. To the extent that this bill would add to the duties of community college districts, it would constitute a state-mandated local program.

(2) Existing law establishes the Student Aid Commission in state government for, among other duties, the administration of student financial aid programs and the dissemination of information about all institutional, state, and federal student aid programs to potential applicants.

This bill would require the commission, in the event that the Financial Aid Shopping Sheet developed by the United States Department of Education is no longer available, to develop, in consultation with the Bureau for Private Postsecondary Education, a similar form that a postsecondary educational institution subject to the requirements of this bill will use.

(3) The existing California Private Postsecondary Education Act of 2009 provides for the regulation of private postsecondary educational institutions by the Bureau for Private Postsecondary Education in the Department of Consumer Affairs. The act is repealed by its own provisions as of January 1, 2021.

This bill would add to the California Private Postsecondary Education Act of 2009 a provision that would require, by January 1, 2020, and permanently thereafter, as applicable, each private postsecondary educational institution subject to its provisions that participates in federal student financial aid programs or specified veterans' financial aid programs to provide students with the Financial Aid Shopping Sheet as developed by the United States Department of Education to inform students or potential students about financial aid award packages prior to enrollment, as specified.

(4) The California Constitution requires the state to reimburse local agencies and school districts for certain costs mandated by the state. Statutory provisions establish procedures for making that reimbursement.

This bill would provide that, if the Commission on State Mandates determines that the bill contains costs mandated by the state, reimbursement for those costs shall be made pursuant to the statutory provisions noted above.

Vote: majority Appropriation: no Fiscal Committee: yes Local Program: yes

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## THE PEOPLE OF THE STATE OF CALIFORNIA DO ENACT AS FOLLOWS:

**SECTION 1.** Section 66021.3 is added to the Education Code, to read:

**66021.3.** (a) Notwithstanding Section 67400, by January 1, 2020, and permanently thereafter, each campus of the University of California, the California State University, and the California Community Colleges, and each independent institution of higher education as defined in Section 66010, shall provide students with the Financial Aid Shopping Sheet as developed by the United States Department of Education to inform students or individuals who have been offered admission about financial aid award packages. An institution subject to this section shall provide the completed Financial Aid Shopping Sheet when it provides in print or electronically a financial aid award package to an individual who is offered admission to his or her institution.

(b) In implementing this section, the institutions of higher education identified in this section may seek guidance as needed from the United States Department of Education.

**SEC. 2.** Section 69514 of the Education Code is amended to read:

**69514.** The commission shall do all of the following:

(a) Report, on or before April 1 of each year, statistical data examining the impact and effectiveness of state-funded programs. The commission shall utilize common criteria in determining the impact of these programs, and shall have the authority to obtain any data from postsecondary educational institutions necessary for the reports. To the extent practicable, this report shall specifically note the number and the demographic characteristics of the students who qualify for a Cal Grant award based on obtaining high school graduation or its equivalent pursuant to paragraph (2) of subdivision (e) of Section 69433.9.

(b) Collect and disseminate data concerning the financial resources and needs of students and potential students, and the scope and impact of existing state, federal, and institutional student aid programs.

(c) Report, on or before April 1 of each year, the aggregate financial need of individuals seeking access to postsecondary education and the degree to which current student aid programs meet this legitimate financial need.

(d) Develop and report annually the distribution of funds and awards among income groups, ethnic groups, grade point average levels, and postsecondary education segments.

(e) Prepare and disseminate information regarding the criteria utilized in distributing available student aid funds.

(f) Be authorized to expend funds for the purpose of disseminating information about all institutional, state, and federal student aid programs to potential applicants. This distribution of information shall primarily focus on potential applicants with the greatest financial need.

(g) In the event that the Financial Aid Shopping Sheet developed by the United States Department of Education is no longer available, develop, in consultation with the Bureau for Private Postsecondary Education, a similar form that a postsecondary educational institution subject to the requirements of either Section 66021.3 or 94912.5 shall use. The form shall provide students and their families with information including, but not necessarily limited to, grant and scholarship opportunities and net costs associated with attendance at an institution.

**SEC. 3.** Section 94912.5 is added to the Education Code, to read:

**94912.5.** (a) By January 1, 2020, and permanently thereafter, each institution subject to this chapter that participates in federal student financial aid programs, including, but not necessarily limited to, those programs authorized by Title IV of the federal

Higher Education Act of 1965 or veterans' financial aid programs authorized pursuant to Section 21.4253 of Title 38 of the Code of Federal Regulations, shall provide students with the Financial Aid Shopping Sheet as developed by the United States Department of Education to inform students or potential students about financial aid award packages prior to enrollment.

(b) In implementing this section, an institution that is subject to this chapter that participates in federal student financial aid programs, including, but not necessarily limited to, those programs authorized by Title IV of the federal Higher Education Act of 1965 or veterans' financial aid programs authorized pursuant to Section 21.4253 of Title 38 of the Code of Federal Regulations, may seek guidance as needed from the United States Department of Education.

**SEC. 4.** If the Commission on State Mandates determines that this act contains costs mandated by the state, reimbursement to local agencies and school districts for those costs shall be made pursuant to Part 7 (commencing with Section 17500) of Division 4 of Title 2 of the Government Code.