What is the problem we are trying to solve?
Access to Cal Poly by all students – regardless of income level
Our Proposed Solution

- Provide full financial aid for Cal Poly campus fees and academic support for low income California students admitted to Cal Poly – Cal Poly Opportunity Grant.

- Thus enhancing the percentage of low income California students attending and graduating from Cal Poly.

- Moreover, benefiting all students by ensuring that the value of your degree continues to appreciate.

- Fund the Cal Poly Opportunity Grant primarily through establishment of the Cal Poly Opportunity Fee. A Cal Poly fee charged to all entering non-California students starting fall 2018.
Cal Poly Statistics
2017–18

85% California residents

52/48 Percentage split of male and female students

65.7K Applications received for fall 2018

ALWAYS MINIMUM 85% CALIFORNIA RESIDENTS
Why Out-of-State Students?
Cal Poly is Way Under Market!

2017–18

Cost of Attendance – CA Resident

Cost of Attendance – Non-resident US

- UC
- Cal Poly
Under Market – Nonresident tuition

- CAL POLY
- UC
Under Market – Vs Other States
Why Low Income and Diverse Students Don’t Attend Cal Poly

**PROSPECTIVE STUDENT CONCERNS**

- College affordability.
- Distance from home – So Cal, Bay Area, and larger Central Valley cities.
- The cultural and physical environment looks and feels different than my home.
- My family needs my help at home.
- Scholarship and financial aid packages are more robust elsewhere.
University of California system annual cost estimated to be about $8,000 higher per year.

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<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>TUITION &amp; FEES*</td>
<td>$9,432</td>
</tr>
<tr>
<td>BOOKS &amp; SUPPLIES</td>
<td>$1,884</td>
</tr>
<tr>
<td>ROOM &amp; BOARD</td>
<td>$13,116</td>
</tr>
<tr>
<td>PERSONAL &amp; TRANSPORTATION*</td>
<td>$2,793</td>
</tr>
<tr>
<td><strong>TOTAL COST OF ATTENDANCE</strong></td>
<td><strong>$27,225</strong></td>
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</tbody>
</table>

*Out-of-state resident tuition and transportation higher
The Underlying Problem for Students

Residential Tuition and Fees $9,432

- Tuition $5,742
- Campus Fees $3,690

NO STATE AID for on-campus fees.

Cal Grant and State University Grant (SUG) available for tuition.
Net Cost Of Attendance After Financial Aid For Low-Income Students

Cal Poly is the Most Expensive Public University Net of Financial Aid
Our Goal for the Cal Poly Opportunity Grant

• Provide as many undergraduate California students as possible with financial aid for all Cal Poly fees.
  • Long-term: all eligible undergraduate California students (<$12,000 Expected Family Contribution).
  • Short-term: provide aid for full fees to as many undergraduate California students as possible.
  • Starting with engineering, STEM and other high-demand majors.
What is Expected Family Contribution or EFC?

- Expected Family Contribution (EFC) is based on a federal formula that uses a family’s income, assets and benefits to determine a family's ability to assist with their student's educational expenses and how much and what types of financial aid a student is eligible to receive.

**CATEGORIES OF EFC**

- $0
- <$4,000
- $4,000 to $8,000
- $8,000 to $12,000

**STUDENTS <$4,000 EFC:**

- 37% - Latino
- 30% - White
- 20% - Asian
- 13% - Other
Cal Poly Opportunity Grant (CPOG)

- Provide full financial aid for Cal Poly fees for low-income California students.
- Proactive advising and other academic support services to enhance student success and thus graduation rates.
- Require students receiving the Cal Poly Opportunity Grant to live on campus their first two years.
- $900 for tech package.
Cal Poly Opportunity Grant (CPOG)

**FIRST PHASE**

- Students with Expected Family Contribution <$4,000.

**SECOND AND FOLLOWING PHASES**

- Include all majors/students at Cal Poly.
- Increase Expected Family Contribution beyond $4,000.
Proposal: Create the Cal Poly Opportunity Fee

- A mandatory, category II, campus-based fee assessed to all out-of-state students.
- Cohort based: the new fees are gradually phased in with each new incoming class of out-of-state freshman, transfer and masters students.
Cal Poly Opportunity Fee (CPOF)

- Phased in annually, by cohort, not to exceed $2,010 per year for four years: not to exceed $8,040 per year following full implementation fall 2021.
- Beyond 2021, additional increases possible with Chancellor’s approval.
- Cal Poly Opportunity Fee and CSU out-of-state tuition combined should not exceed 90% of UC out-of-state tuition and fees.
- Fee remains unchanged if student continues in graduate program.
- Fee changes with second BS or exceeding 200 units.
Cal Poly Opportunity Fee (CPOF)

- Current matriculated out-of-state students would not be subject to the fee.
- Percentage out-of-state resident students at Cal Poly will not exceed current cap of 15%.
- The Cal Poly Opportunity Fee will be assessed in addition to the system-wide per-unit out-of-state tuition.
Purpose of the Cal Poly Opportunity Fee

• Provide primary funding needed to support Cal Poly Opportunity Grant recipients with financial aid and proactive advising.

• AB540 students are among those eligible to receive the Cal Poly Opportunity Grant.

• Support Cal Poly’s future by increasing diversity and creating an intercultural experience that prepares all students for success in an ever-diverse world.
We know aid will attract low income students

CAL POLY SCHOLARS
First Generation Students
2017–18

<table>
<thead>
<tr>
<th>CAL POLY SCHOLARS</th>
<th>ALL CAL POLY STUDENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>68%</td>
<td>21%</td>
</tr>
</tbody>
</table>
Cal Poly Scholars

RETENTION — JR YEAR, 2014 COHORT

Non-First Generation
95
90
85
80
75

First Generation: Non-Cal Poly Scholar

First Generation: Cal Poly Scholar
Increased financial aid also increases diversity

CAL POLY SCHOLARS

OVER 30% LATINO, 30% ASIAN

OR <20% WHITE
Additional benefit of attracting low income students 

ENHANCES DIVERSITY
Detailed Description of Cal Poly Opportunity Fee and Cal Poly Opportunity Grant
Use of the Cal Poly Opportunity Fee

Since Cal Poly has a strong market value and thus the ability to generate the Cal Poly Opportunity Fee differently than other CSU campuses, 15% of gross revenue from the Cal Poly Opportunity Fee will be returned to the Chancellor to financial aid and/or academic support low-income students in the CSU.
Use of the Cal Poly Opportunity Fee

The remaining revenue will be used as follows:

• **50%** - Cal Poly Opportunity Grant.

• **25%** - Support services for low-income, first-generation students.

• **25%** - Cal Poly (Pending budget conditions, additional support may be provided to Cal Poly Opportunity Grant or support during initial phase-in).
## Projected Fees and Revenues

<table>
<thead>
<tr>
<th>YEAR</th>
<th>COHORT INCREASE</th>
<th>CUMULATIVE INCREASE</th>
<th>CAL POLY OPPORTUNITY FEE REVENUE</th>
</tr>
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<tbody>
<tr>
<td>2018</td>
<td>$2,010</td>
<td>$2,010</td>
<td>$1.64 m</td>
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<tr>
<td>2019</td>
<td>$2,010</td>
<td>$4,020</td>
<td>$4.85 m</td>
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<tr>
<td>2020</td>
<td>$2,010</td>
<td>$6,030</td>
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<td>$2,010</td>
<td>$8,040</td>
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<td>2022</td>
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<td>2023</td>
<td>$8,040</td>
<td>$24.14 m</td>
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</table>
## Students Impacted (Fees + $900 Tech)

<table>
<thead>
<tr>
<th>YEAR</th>
<th>CAL POLY OPPORTUNITY FEE ONLY FIRST TIME FRESHMAN AND NEW TRANSFER ONLY</th>
<th>CAL POLY OPPORTUNITY FEE ONLY ALL STUDENTS</th>
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<tbody>
<tr>
<td>2018</td>
<td>149</td>
<td>149</td>
</tr>
<tr>
<td>2019</td>
<td>292</td>
<td>432</td>
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<tr>
<td>2020</td>
<td>467</td>
<td>871</td>
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<td>2021</td>
<td>644</td>
<td>1,454</td>
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<tr>
<td>2022</td>
<td>653</td>
<td>1,906</td>
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<tr>
<td>2023</td>
<td>661</td>
<td>2,226</td>
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## Projected Use of Revenue

<table>
<thead>
<tr>
<th>YEAR</th>
<th>CAL POLY OPPORTUNITY GRANT</th>
<th>SUPPORT</th>
<th>CAL POLY</th>
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<tbody>
<tr>
<td>2018</td>
<td>$0.70 m</td>
<td>$0.35 m</td>
<td>$0.35 m</td>
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<tr>
<td>2019</td>
<td>$2.06 m</td>
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<tr>
<td>2020</td>
<td>$4.11 m</td>
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<td>2021</td>
<td>$6.84 m</td>
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<td>2022</td>
<td>$8.87 m</td>
<td>$4.44 m</td>
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<tr>
<td>2023</td>
<td>$10.26 m</td>
<td>$5.13 m</td>
<td>$5.13 m</td>
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</table>
Governance

USE OF THE CAL POLY OPPORTUNITY FEE

• Fees will be used for academic support of students with proposals reviewed by an advisory committee.

• Cal Poly Opportunity Fee advisory committee will be composed of students, faculty and staff; and will include members recommended by ASI and Academic Senate.

• At least one student representing Cal Poly Opportunity Grant recipients and students paying Cal Poly Opportunity Fee.
Governance

USE OF THE CAL POLY OPPORTUNITY FEE

• Annual report provided to advisory committee, ASI, Academic Senate, Cal Poly Campus Advisory Committee and the Chancellor.

• Program reviewed by Chancellor or designee no earlier than fall 2023.
Learn by Doing

IMPACTS

• Create a campus that more closely resembles our diverse state.

• Serve a greater cross-section of California residents by providing financial aid and academic support to low-income California students.

• Help all graduates leave Cal Poly even more prepared to tackle future challenges and collaborate in a global society.

• Ensure value of Cal Poly degree continues to appreciate over time.
Share your comments through March 14 by going to the Cal Poly Portal.
THANK YOU