Using Zoom Webinar

➢ To submit questions, click on the Q&A icon on the control panel. The Q&A window will appear, allowing you to ask questions to the host and panelists.

➢ You can also access the chat feature, raise your hand, and adjust your audio settings from the control panel.

➢ The webinar materials and recording will be posted at www.jbay.org following the live presentation.

All questions (1)   My questions

Lee 01:54 PM

Will there be a follow-up session?

You 02:11 PM
The host said there will be a session next week.

👍 1   Comment

Type your question here...

AGENDA

1   Overview of SAP

2   Impact of SAP on Students

3   Student Stories

4   AB 789 Overview

5   AB 789 Provisions

6   Q&A

John Burton Advocates for Youth

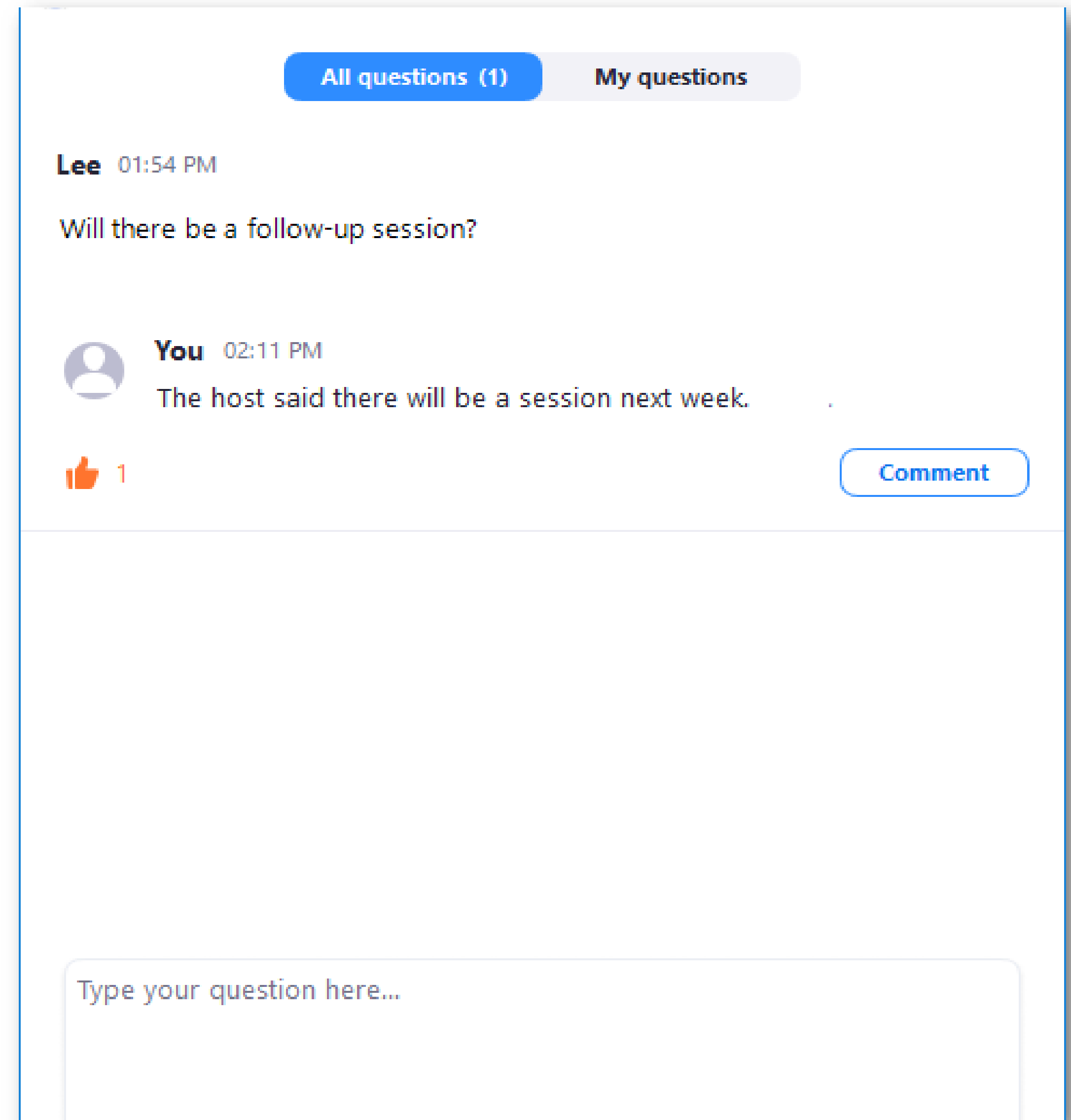# TODAY'S PRESENTERS

Sarah Pauter

Senior Project Manager

John Burton Advocates for Youth

Erin Clews

Student

UC Santa Cruz

Taneil Franklin

Student

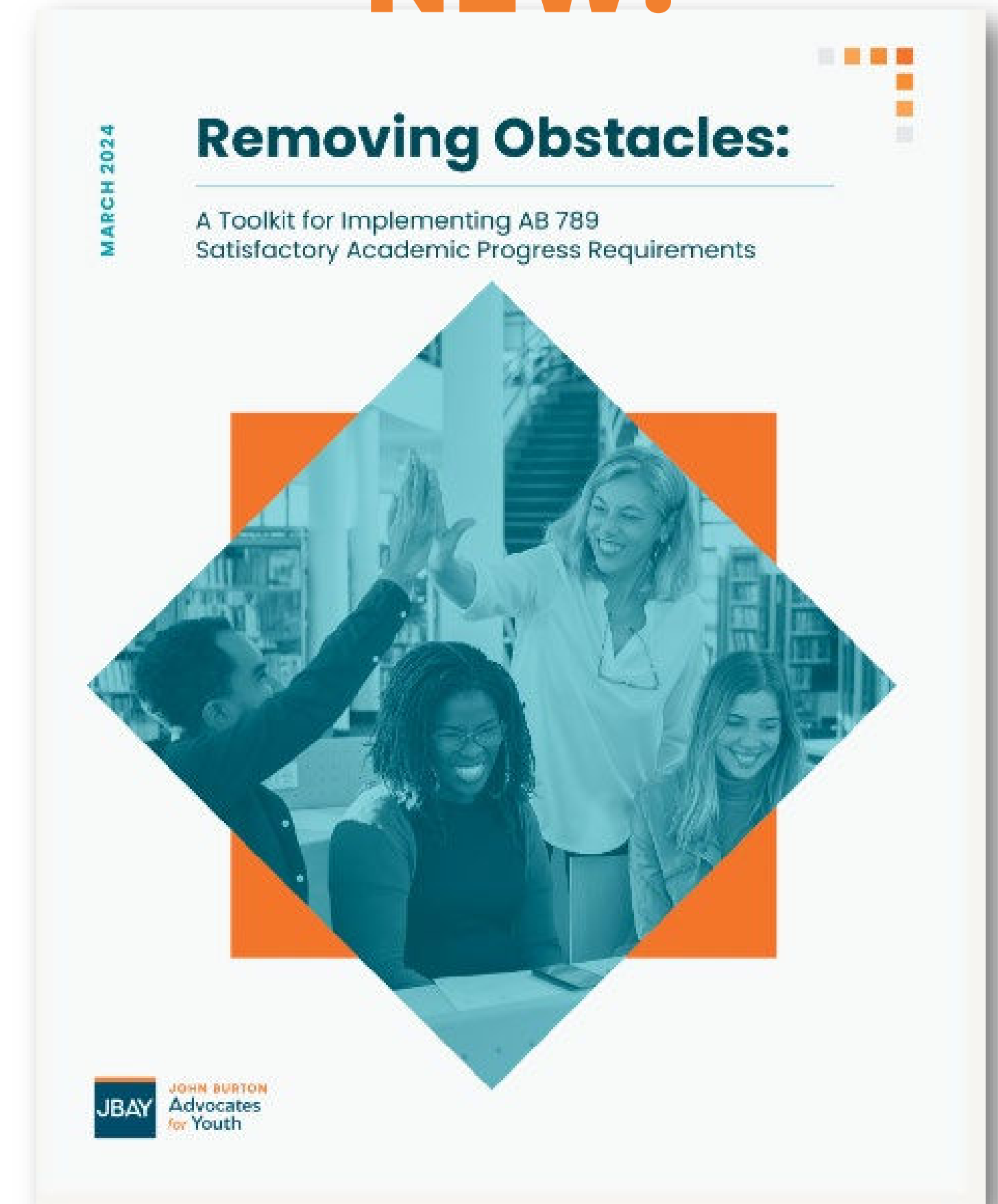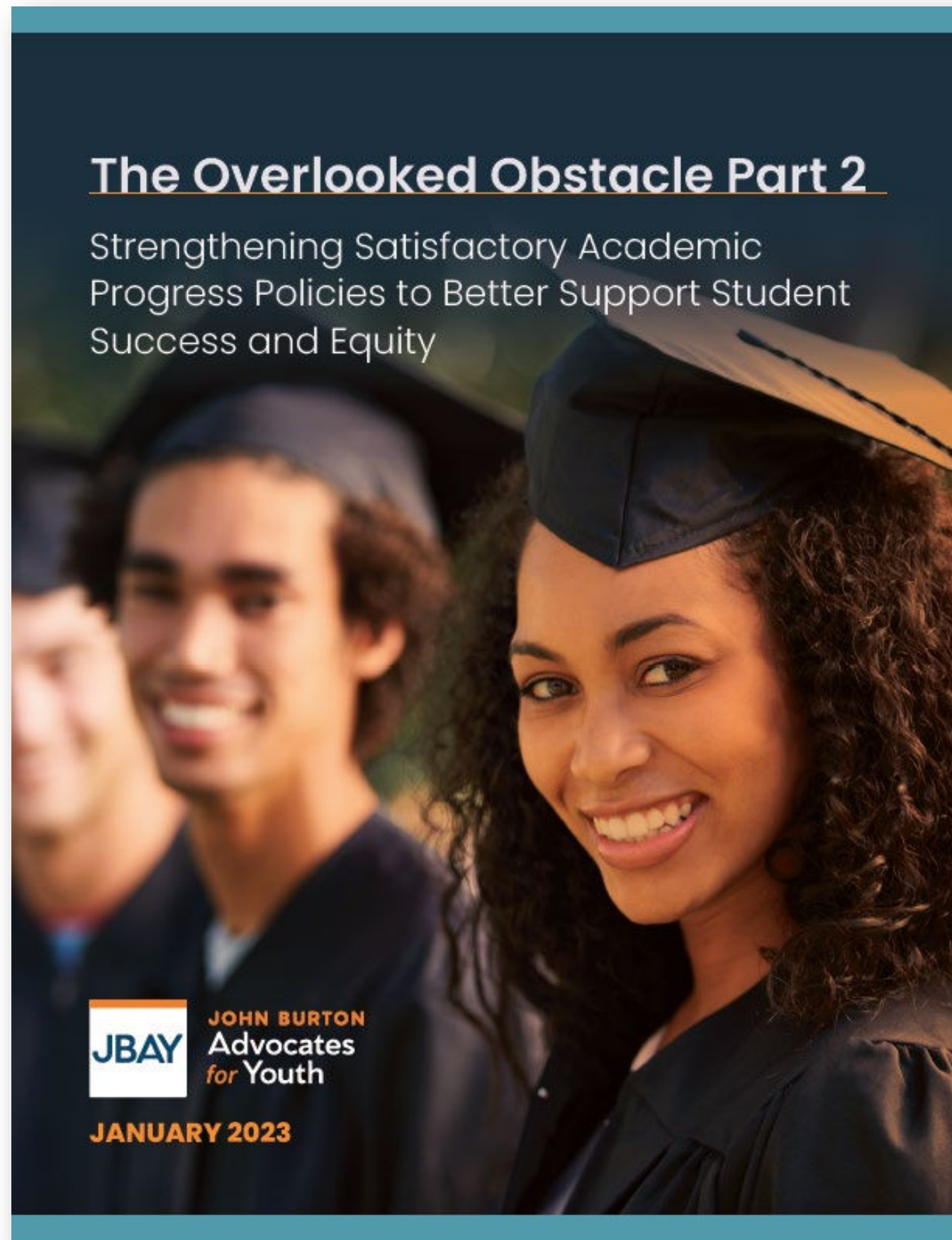Los Angeles Trade Technical College

Christina Tangalakis

Associate Dean, Financial Aid Office
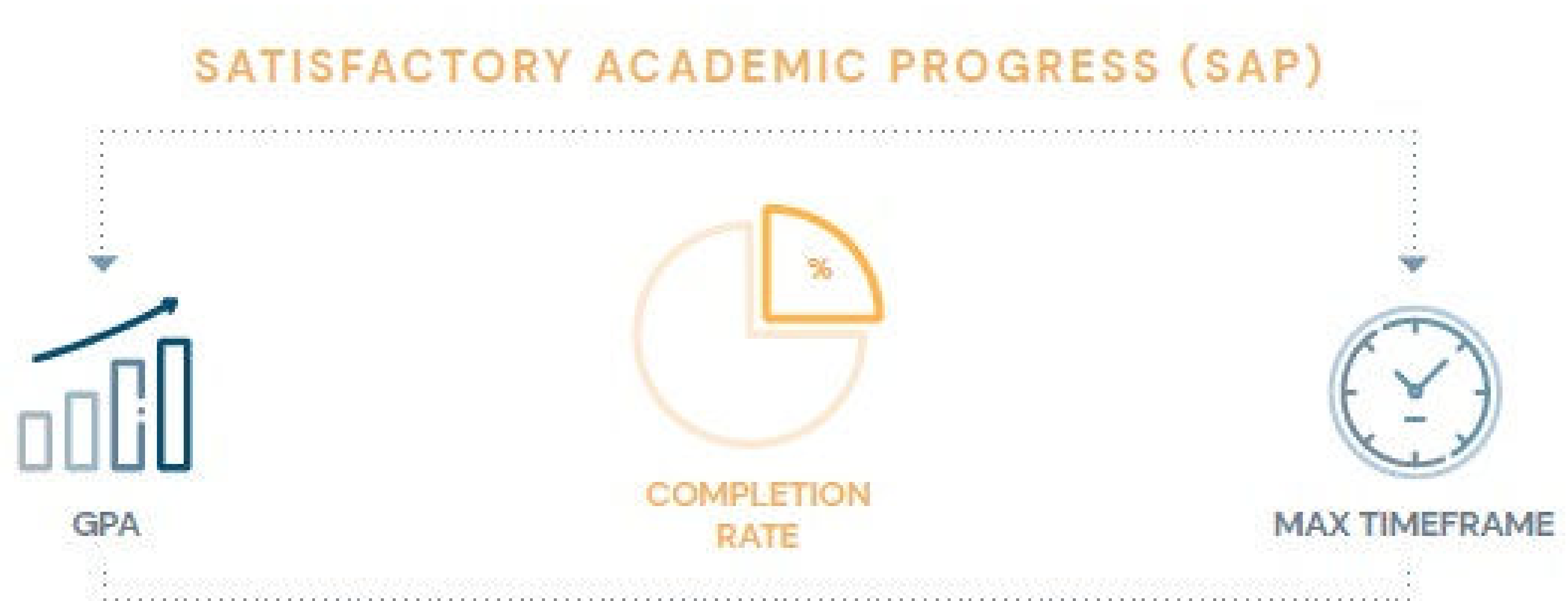
Glendale Community College
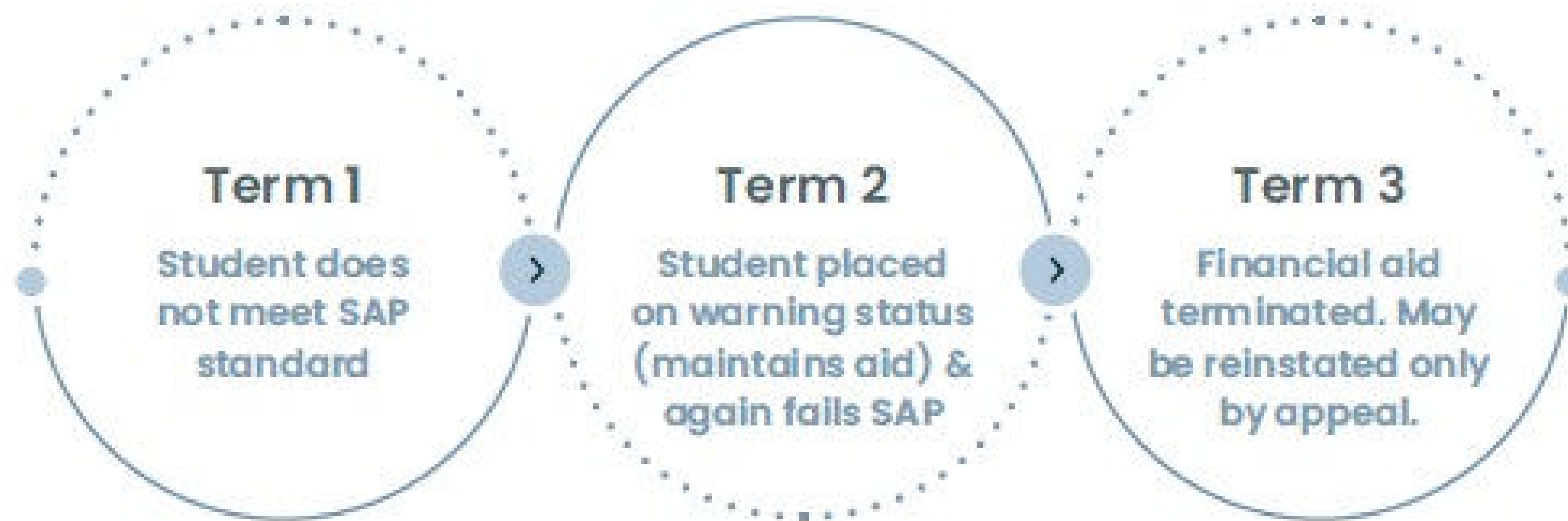
INTRODUCTION

The Overlooked Obstacle Series

NEW!

JULY 2021

The
Overlooked
Obstacle

How Satisfactory Academic Progress Policies
Impede Student Success and Equity

JBAY JOHN BURTON
Advocates
for Youth

The Overlooked Obstacle Part 2

Strengthening Satisfactory Academic
Progress Policies to Better Support Student
Success and Equity

JBAY JOHN BURTON
Advocates
for Youth

JANUARY 2023

MARCH 2024

Removing Obstacles:

A Toolkit for Implementing AB 789
Satisfactory Academic Progress Requirements

JBAY JOHN BURTON
Advocates
for Youth

jbay.org/college/expanding-financial-aid/
jbay.org/resources/ab789-implementation-toolkit/

John Burton Advocates for Youth

What is Satisfactory Academic Progress?

SATISFACTORY ACADEMIC PROGRESS (SAP)

GPA

COMPLETION RATE

MAX TIMEFRAME

How Does SAP Impact Financial Aid?

INSTITUTIONS THAT EVALUATE SAP EACH PAYMENT PERIOD

Term 1
Student does not meet SAP standard

Term 2
Student placed on warning status (maintains aid) & again fails SAP

Term 3
Financial aid terminated. May be reinstated only by appeal.
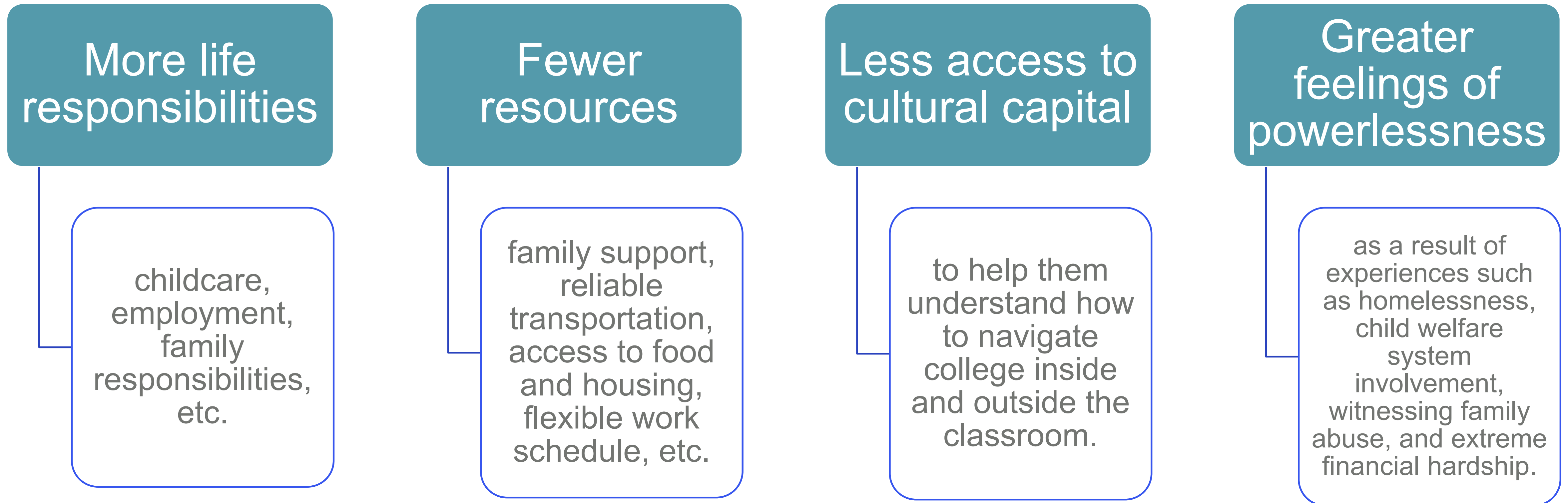
Appeal: "death of a relative, an injury or illness of the student, or special circumstances as determined by the institution"

IMPACT OF SAP
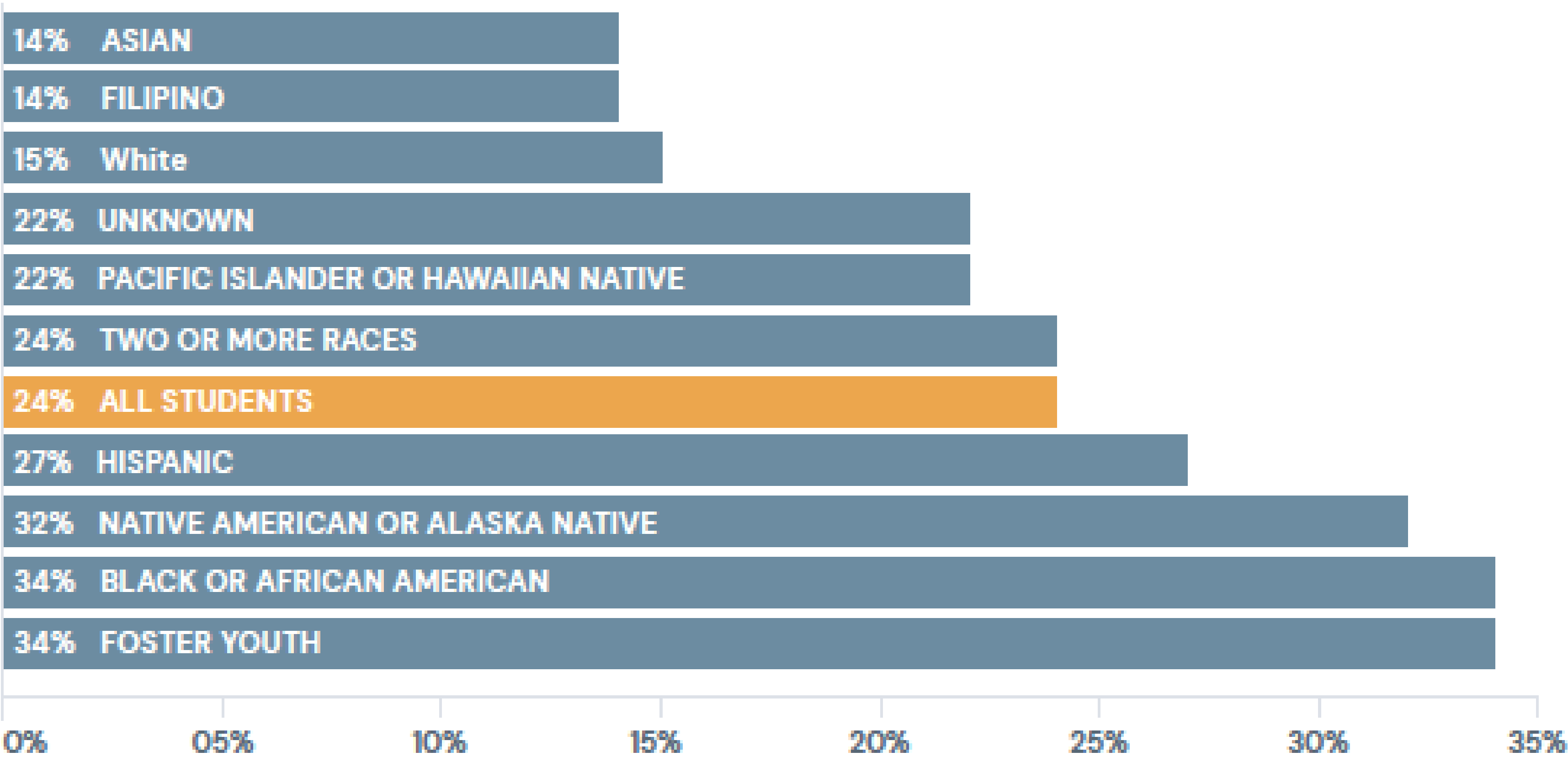
Research Review – Qualitative
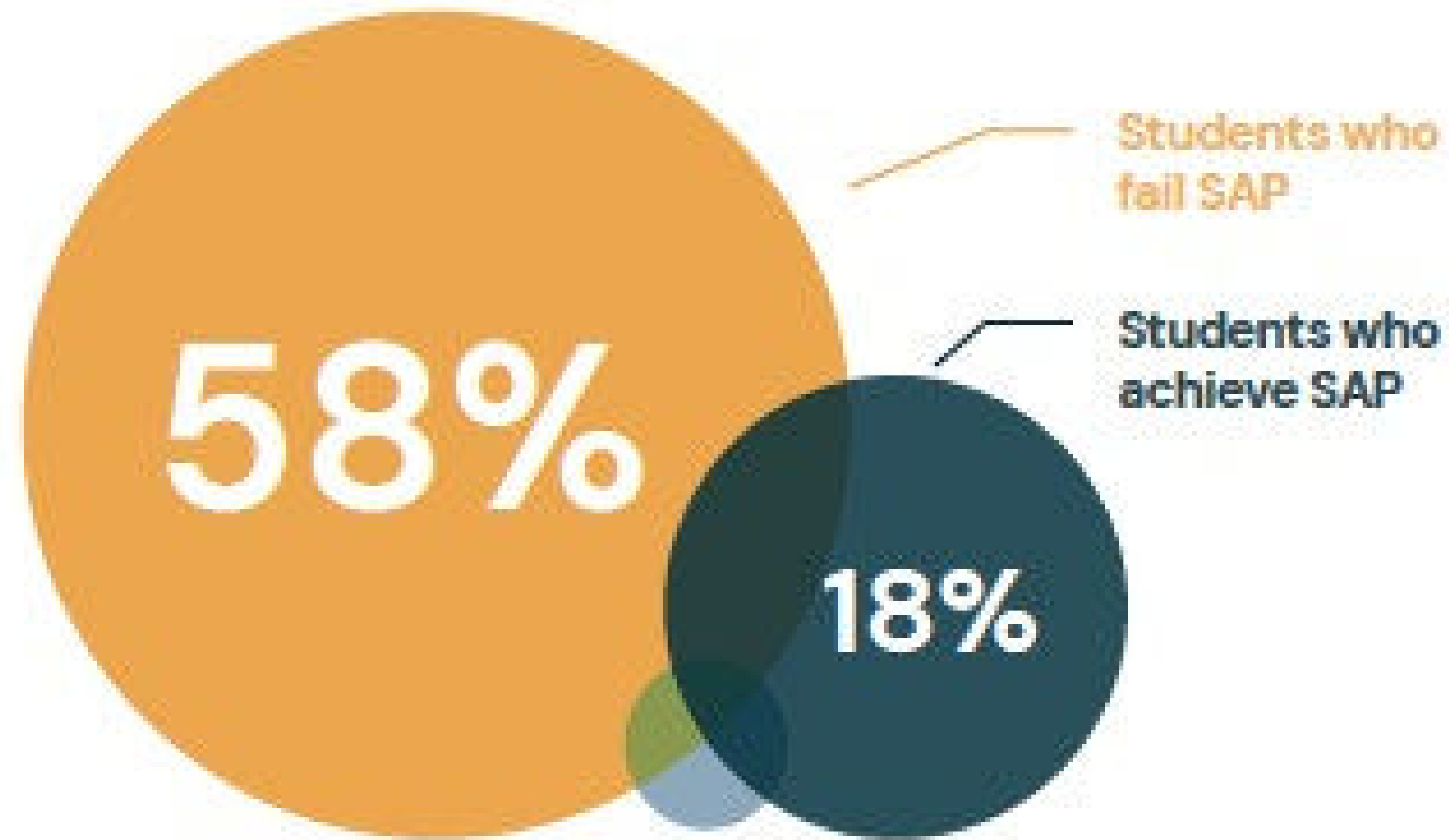
Students not making SAP had:

More life responsibilities	Fewer resources	Less access to cultural capital	Greater feelings of powerlessness
childcare, employment, family responsibilities, etc.	family support, reliable transportation, access to food and housing, flexible work schedule, etc.	to help them understand how to navigate college inside and outside the classroom.	as a result of experiences such as homelessness, child welfare system involvement, witnessing family abuse, and extreme financial hardship.

Percent of students who remained enrolled for first two consecutive terms and failed to make SAP in both terms

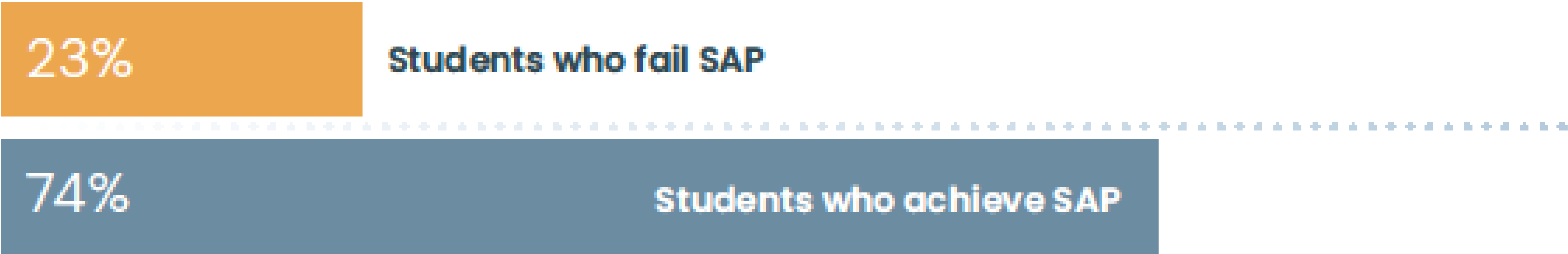|	
14%	ASIAN
14%	FILIPINO
15%	White
22%	UNKNOWN
22%	PACIFIC ISLANDER OR HAWAIIAN NATIVE
24%	TWO OR MORE RACES
24%	ALL STUDENTS
27%	HISPANIC
32%	NATIVE AMERICAN OR ALASKA NATIVE
34%	BLACK OR AFRICAN AMERICAN
34%	FOSTER YOUTH

0%   05%   10%   15%   20%   25%   30%   35%

Among foster youth, Black, and Native American Pell Grant recipients, over one-third have been disqualified from financial aid after their first year.

Percent of students who fail to enroll for a third term

58%

18%

Students who fail SAP

Students who achieve SAP

Percent of students who maintain financial aid in their third term

23% — Students who fail SAP

74% — Students who achieve SAP

STUDENT STORIES

Student Panel

1. Tell us about yourself!
2. What were the circumstances that resulted in you not meeting SAP?
3. What was it like navigating the appeals process?
4. What AB 789 provisions do you think will be most impactful for students and why?
5. Where are you now in your educational journey, and what are your long-term educational and career goals?

Erin Clews

Taneil Franklin

ASSEMBLY BILL 789

SAP POLICIES ACROSS CALIFORNIA'S INSTITUTIONS

- **Many institutions imposed requirements that were stricter than federal requirements:**
  - 10 institutions mandated course completion thresholds higher than 67 percent
  - Some campuses assessed SAP based on cumulative measures while others examined cumulative and term-based measures

- **No two campuses had the same appeals process or criteria:**
  - The grounds for filing an appeal varied widely—some special circumstances were explicitly allowed at some institutions while being explicitly disallowed at others
  - Some campuses limited the number of "lifetime" appeals a student could submit

Assembly Bill (AB) 789 Background

1

Ensure students can maintain good SAP standing by setting institutional standards at the federal minimums

2

Create consistent and student-friendly appeal processes to encourage the submission of appeals

3

Enhance communication to students about SAP policies, the implications of not meeting SAP, and appeal processes

AB 789 Fast FAQs

1. **When does AB 789 go into effect?** All AB 789 provisions must be operationalized by the start of the 2024–25 academic year.

2. **Is AB 789 applicable to public institutions only, or both public and private colleges and universities?** AB 789 applies to any institution whose students receive Cal Grants, and therefore includes both public and private colleges and universities.

3. **Do the AB 789 provisions align with federal statute and regulations?** All AB 789 provisions are consistent with current federal statute and regulations.

4. **Will institutions need two separate SAP policies for state and federal financial aid?** Because the provisions required by AB 789 all fall within the federal requirements, institutions can utilize the same SAP policy for both state and federal financial aid.

AB 789 PROVISIONS

1. Creating AB 789 Compliant SAP Policies

HOT TIP!

Once an institution has made updates to its SAP policy in alignment with AB 789 requirements, it will need to make evaluation adjustments in its financial aid management system (FAMS) to align with the new SAP policy standards. Institutions should also amend their SAP notification letters and communications to reflect the changes.

✓ Set the GPA and pace of completion standards at the federal minimum requirements

✓ Evaluate SAP based **only** on cumulative measures as opposed to cumulative and individual term–based measures

✓ Exclude remedial coursework from maximum timeframe calculations

✓ Exclude transfer credits that do not count towards a student's current program of study from maximum timeframe calculations

Campus Spotlight: Glendale Community College

Reduced completion rate requirement from 70% to 67% to align with the federal minimum requirements and created flexibility in evaluating certain credits (e.g., exclusion of repeated courses).

Campus Spotlight: Glendale Community College

Resulted in a **22%** overall decrease in the number of students on financial aid disqualification due to SAP.

	Number AY17	Percent AY17	Number AY21	Percent AY21	Decrease
SAP Dismissal	2228	18%	1475	14%	**22%**

2. Developing Consistent and Accessible Appeals Processes

✓ Notify students of their option to appeal

✓ Accept both electronic and hard copy appeals

✓ Create consistency in the handling of appeals
- Deadlines must be no earlier than three weeks before the end of the term
- Decisions must be determined and communicated to students within 45 days of submission
- Students with a pending appeal cannot be dropped for nonpayment
- Offer a second review process for appeals that are denied

Expanded Special Circumstances

✓ Expand and explicitly state the special circumstances that can form the basis of an appeal:

- o Death of a relative or other significant person
- o Injury or illness, including behavioral health conditions, of the student or a relative or other significant person
- o Pregnancy or birth of a child
- o Homelessness
- o Loss of childcare
- o Loss or change in employment
- o Loss of access to personal or public transportation
- o Being a victim of a serious crime
- o Natural disaster
- o Change of major

Developing Consistent and Accessible Appeals Processes (continued)

- ✓ Allow students to appeal in any subsequent term, and do not limit the number of lifetime appeals a student may submit
- ✓ Waive third-party documentation requirements when documentation cannot be reasonably obtained
- ✓ Accept appeals from re-entering students who disenrolled while on SAP disqualification
- ✓ Allow students who adhere to their academic plan to remain on "financial aid probation"

Campus Spotlight: Glendale Community College

	Students on SAP Dismissal in 2020-2021		Students Appealing in 2020-2021		SAP Dismissal Students Re-enrolling at GCC After SAP Dismissal and Appeal in 2020-2021		SAP Dismissal Students Re-enrolling at GCC Anytime After Dismissal		
	Student Count	Percent of Total	Student Count	Appeal Rate*	Student Count	Percent of Total	Student Count	Re-enroll Rate**	Attrition Rate***
Number of Students	1,475	6.5%	105	**7.1%**	99	**94.3%**	1,026	**69.6%**	30.4%
Latinx/Hispanic	585	13.9%	42	**7.2%**	41	**97.6%**	415	**70.9%**	29.1%
Black/African American	61	10.6%	2	**3.3%**	2	**100.0%**	35	**57.4%**	42.6%

3. Enhancing Communication to Students

SAMPLE SYLLABI STATEMENT
YOUR GRADES MATTER!

In order to continue to receive financial aid, you must meet the Satisfactory Academic Progress (SAP) requirements. Making satisfactory academic progress means that you are maintaining a 2.0 GPA, you have successfully completed 67% of your coursework, and you will graduate on time.

If you do not maintain SAP, you may lose your financial aid. If you have questions, please contact financial aid at financialaid@txstate.edu.

✓ Provide information to students about the institution's SAP standards and financial aid appeal process:
- o Include information about the institution's SAP policy and appeal process during new student orientation
- o Request that faculty embed "student-friendly language" on the institution's SAP standards and appeal process on course syllabi
- o Include SAP policy and appeal process information on institutional websites and in financial aid offers

What is "student-friendly" language?

- Limit jargon
- Use active voice with the subject of each sentence performing the verb in the sentence (e.g., "The student must show their ID" instead of "An ID must be shown by the student")
- Prioritize short sentences and use simple sentence structure
- Use lower grade-level diction and vocabulary
- Embed contact information!
- Segment information into smaller sections that pertain to student actions

University of Wisconsin-Madison

- Includes clear, simple SAP information on their website, parsing the content in easy-to-follow menu schemes.

- Clearly, simply explains how to make SAP, what happens if students do not make SAP, how to appeal, and what the appeal process is.

What is Satisfactory Academic Progress?

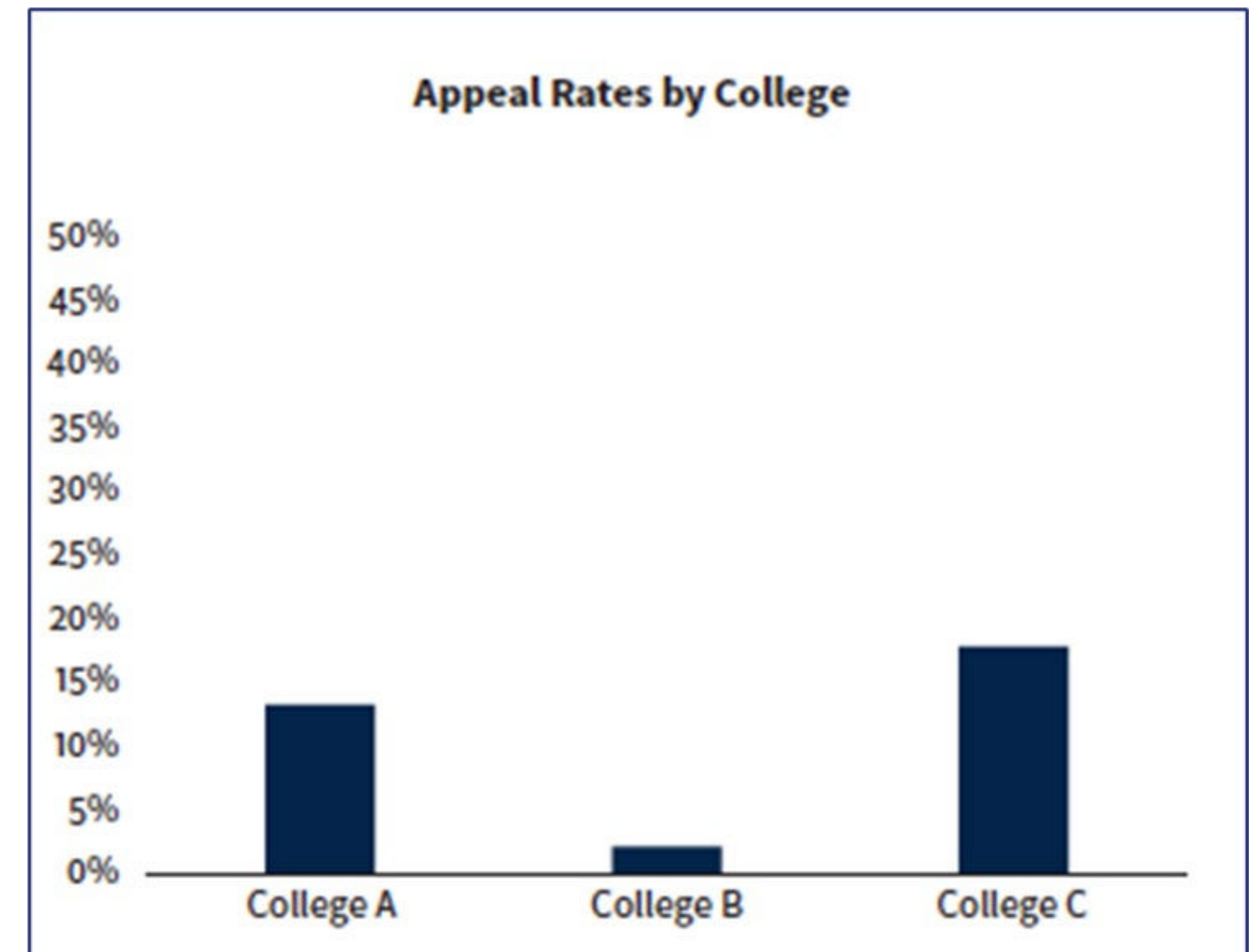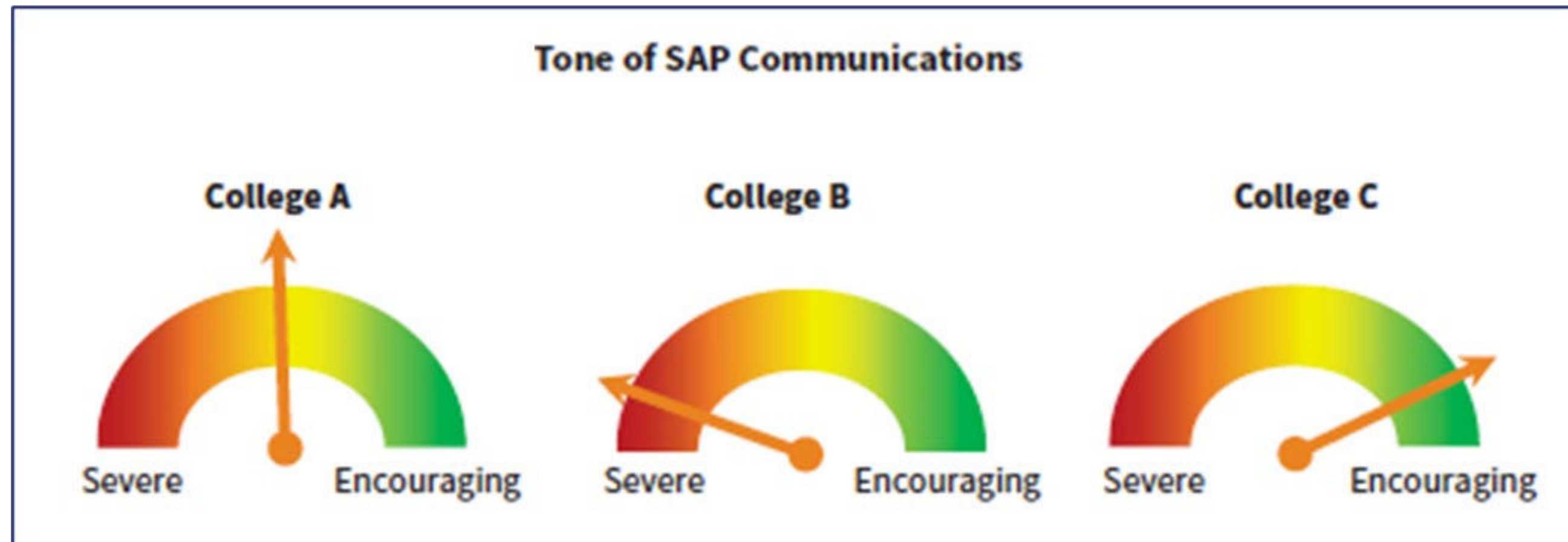| **Satisfactory Academic Progress (SAP)** | **Not Meeting SAP** | **Appeal Process** | **Other Options** |

The following three components are evaluated at the end of each academic year:

1. Undergraduate students must have a minimum cumulative grade point average of 2.0.

2. You must successfully complete a cumulative 2/3 (67%) of all credits for which you attempt.

   - **"Attempted"** coursework includes all classes that appear on your official transcript, including those with a DR (dropped) or W (withdrew) grade notation. The last day to drop classes without a DR or W notification varies each semester – check the Registrar's Office "Key Deadlines" for specifics.

   - **"Completed"** coursework includes all classes with a passing grade (D or above). Credits that are dropped, failed, or incomplete will negatively impact your completion rate.

3. You may not enroll for more than 150% of the number of credits needed to complete your degree. Transfer credits and prior degree credits are included in this evaluation.

https://financialaid.wisc.edu/eligibility/

Impact of Communication Tone

Tone of SAP Communications

College A

Severe — Encouraging

College B

Severe — Encouraging

College C

Severe — Encouraging

Appeal Rates by College

50%
45%
40%
35%
30%
25%
20%
15%
10%
5%
0%

College A | College B | College C

Source: Headlam, C. Marano E., Yu, J. (2009). A Matter of Degree: Using Behavioral Science to Identify Barriers to Credit Intensity and Satisfactory Academic Progress, Center for Applied Behavioral Science at MDRC
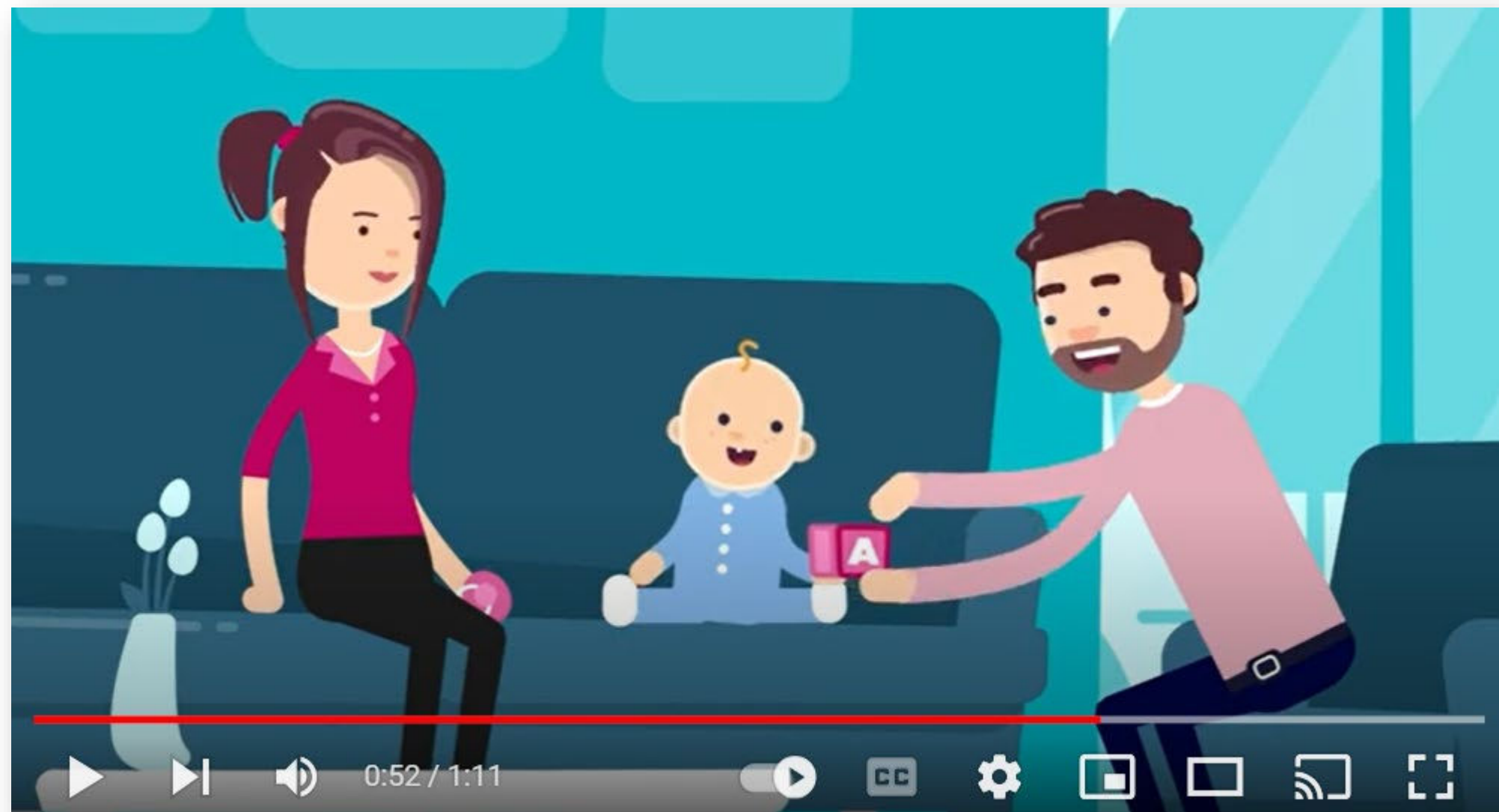
John Burton Advocates for Youth

Enhancing Communication to Students (continued)

SAMPLE NOTIFICATION LANGUAGE

This is an alert to inform you that you did not meet Satisfactory Academic Progress (SAP) standards during the [fall/spring/summer] term. If you do not meet the SAP standards by the next formal evaluation point at the end of the [INSERT] term, you will no longer be eligible for future financial aid. As a reminder, the SAP standards you must meet are listed below. We want you to be successful at [INSTITUTION] and encourage you to reach out to the on-campus resources listed below that can help you improve your academic progress.

- ✓ Notify students after each term in which SAP has **not** been met
  - ○ Note: These informal reviews do not require institutions that evaluate annually to change their formal evaluation frequency or place students on formal financial aid warning status

Campus Spotlight: Glendale Community College

This is Mynd FLAT | Showreel

- Currently creating a 2 minute "flat motion" SAP informational video with Mynd that will be available in English, Spanish, and Armenian

- Developing financial aid modules for New Student Orientation in Canvas

AB 789 Technical Assistance

- Launching this week!

- Institutions will have the opportunity to apply for a "mini-grant" to support implementation

- Fill out the brief interest survey to schedule a one-on-one session or contact sarah@jbay.org

Q&A

Please type your questions in the Q&A window or raise your hand to be unmuted.

John Burton Advocates for Youth

THANK YOU

Sarah Pauter
sarah@jbay.org

JBAY.ORG