REMUKG OBSTACLES: A Toolkit for Implementing AB 789 Satisfactory Academic Progress (SAP) Requirements

April 30, 2024
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.
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
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

[Images of book covers]

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

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What is Satisfactory Academic Progress?

SATISFACTORY ACADEMIC PROGRESS (SAP)

GPA

COMPLETION RATE

MAX TIMEFRAME
How Does SAP Impact Financial Aid?

Appeal: “death of a relative, an injury or illness of the student, or special circumstances as determined by the institution”
Research Review – Qualitative

Students not making SAP had:

- **More life responsibilities**
  - childcare, employment, family responsibilities, etc.

- **Fewer resources**
  - family support, reliable transportation, access to food and housing, flexible work schedule, etc.

- **Less access to cultural capital**
  - to help them understand how to navigate college inside and outside the classroom.

- **Greater feelings of powerlessness**
  - 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

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%

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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?
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

- 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

**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.

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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.

<table>
<thead>
<tr>
<th></th>
<th>Number AY17</th>
<th>Percent AY17</th>
<th>Number AY21</th>
<th>Percent AY21</th>
<th>Decrease</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAP Dismissal</td>
<td>2228</td>
<td>18%</td>
<td>1475</td>
<td>14%</td>
<td>22%</td>
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</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Number of Students</th>
<th>Student Count</th>
<th>Percent of Total</th>
<th>Student Count</th>
<th>Appeal Rate*</th>
<th>Student Count</th>
<th>Percent of Total</th>
<th>Student Count</th>
<th>Re-enroll Rate**</th>
<th>Attrition Rate***</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>1,475</td>
<td>6.5%</td>
<td>105</td>
<td>7.1%</td>
<td>99</td>
<td>94.3%</td>
<td>1,026</td>
<td>69.6%</td>
<td>30.4%</td>
</tr>
<tr>
<td>Latinx/Hispanic</td>
<td>585</td>
<td>13.9%</td>
<td>42</td>
<td>7.2%</td>
<td>41</td>
<td>97.6%</td>
<td>415</td>
<td>70.9%</td>
<td>29.1%</td>
</tr>
<tr>
<td>Black/African American</td>
<td>61</td>
<td>10.6%</td>
<td>2</td>
<td>3.3%</td>
<td>2</td>
<td>100.0%</td>
<td>35</td>
<td>57.4%</td>
<td>42.6%</td>
</tr>
</tbody>
</table>

*Appeal Rate* refers to the percentage of students appealing their SAP dismissal in 2020-2021.

**Re-enroll Rate** refers to the percentage of students re-enrolling at GCC after SAP dismissal and appeal in 2020-2021.

***Attrition Rate*** refers to the percentage of students who left the college after SAP dismissal any time after dismissal.

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3. Enhancing Communication to Students

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

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.

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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.

https://financialaid.wisc.edu/eligibility/
Impact of Communication Tone

Enhancing Communication to Students (continued)

- 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

- 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

This is Mynd FLAT | Showreel
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
Please type your questions in the Q&A window or raise your hand to be unmuted.
THANK YOU

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